Phase 2 recommendations

Fixing Transport Assessments

On behalf of the
Fixing Transport Assessments National Working Group

CONTROL SHEET

Issued by: Fixing Transport Assessment National Working Group

Project: Fixing Transport Assessments
Title: Phase 2 recommendations
Status: For submission to DfT and MHCLG
Date: 24 July 2024

Document Production Record

Issue	Purpose/Status	Prepared by	Checked	Reviewed	Date
01	Draft	Nicola Waight (chair)	Nicola Lodge (vice chair)	FTA Working Group presenters	15/5/2024
02	Final	Nicola Waight (chair)	Jayne Meyrick	N/A	24/07/2024

Reviewers:
As would be expected with any Working Group covering such a broad range of expertise and specialities, there have been differences of opinion over weighting and focus of aspects of the development of this report. The report seeks to capture the majority view, and differences where they exist.

The final report has been authored by Nicola Lodge, Jayne Meyrick and Nicola Waight All views expressed are those of the individuals involved and are not necessarily reflective of their respective organisations.

Executive summary:

This report forms the Phase 2 outputs of the Fixing Transport Assessments National Working Group. The group is a coalition of local authorities and private sector transport consultancies, working together to propose improvements to the transport assessment process.

The current process is broken. All too often it enables car dependent developments that take us further and further away from our national ambition for low carbon, healthy developments where people want to live and work.

It follows a Phase 1 report issued in November 2023, which:

- reviewed the current policy position, and the practices it has resulted in;
- recommended changes to these policies; and
- identified six key themes for further investigation.

This Phase 2 document explores these six key themes, and makes detailed recommendations to the Government on updating policy and guidance on transport assessments (TA) to:

- Ensure that collaboration happens earlier and more often, within multidisciplinary design teams and with the local planning and highway authorities – supporting a process where positive decisions on development can be reached more quickly;
- Support a wide range of national policy goals, instead of 'locking in' car dependent, unhealthy developments; and
- Rebalance the range of assessment needed, without increasing the overall cost and effort spent.

Whilst there is significant interest among local authorities in new Vision Led transport assessment approaches, with some already adopting/seeking to adopt their own guidance, far broader changes to TA guidance and related policy (NPPF) and guidance (PPG) are required to meet our policy goals. Without national guidance, this change in approach will be slow at best; but more likely, uncertainty around planning inspector support, programmes, local growth, and tight budgets will 'water down' or prevent change.

The Working Group requests the Government to consider these recommendations and take the lead to change policy and guidance on TAs to achieve better alignment with national, regional and local policy goals, through plan making and decision taking.

Background

The Fixing Transport Assessments (or Fixing TAs) National Working Group was established in early 2023 in reaction to:

- firstly, the failure of existing TA guidance to maximise sustainable transport, and
- secondly, to respond to the national, regional and local policy landscape which has changed substantially in recent years but is not yet captured in much of the guidance.

The work of the group covers site-specific TAs and Local Plan TAs.

The Working Group was initially proposed by Hampshire County Council, which is undertaking a review of its own development management guidance to better support its newly adopted Local Transport Plan, and it has since grown through open invitation to include interested transport planning professionals.

The group is local authority led, but also includes consultants and professional organisations and arm's length bodies. At the time of writing, there are 114 members, representing 52 organisations, roughly evenly split between local government and the consultants that work for both them and developers, plus a related "Fixing TAs" LinkedIn group[1] with over 300 members. The group's terms of reference and list of members and member organisations are appended.

The Working Group **aims** to:

- review what changes could be made to transport assessment guidance and practice to better align their outcomes to national, regional, and local priorities including climate emergencies and other significant challenges including public health; and
- advise the Department for Transport (DfT) and the Ministry of Housing, Communities and Local Government (MHCLG) on the scope of potential improvements that they should take forward and implement.

The Working Group is seeking to reframe and refocus TAs around people, and the everyday trips they make, and national, regional, and local policy goals and objectives including:

- Carbon reduction
- Air quality
- Climate change resilience
- Safer streets
- Accessibility for all, particularly through active travel and public transport
- Health
- Local economies
- Quality of life and place

In doing so, the intended **outcomes** from the group are to:

- set out the challenges of existing policy, guidance, and practice;
- make recommendations to the DfT and MHCLG on the changes the group feels are required to policy, guidance and practice (including NPPF, PPG, Local Plans, Local Transport Plans, DfT guidance, and relevant guidance from arm's length bodies including National Highways (NH) and Active Travel England (ATE)), so that they can deliver on the objectives above and that methods and measures are affordable, practical, accessible, and defensible, with examples for others to follow; and
- prove the acceptability of new approaches through the local authority planning application processes, and Local Plan Examination in Public process.

It is the hope of the group that the outcomes will support the DfT, MHCLG and others to develop and adopt new guidance that addresses the recommendations.

The group is undertaking work in three phases, summarised below. **This report provides a summary of the Phase 2 findings**, which covers detailed recommendations on the metrics that should be considered through transport assessment. It reflects the collaborative efforts of all involved.
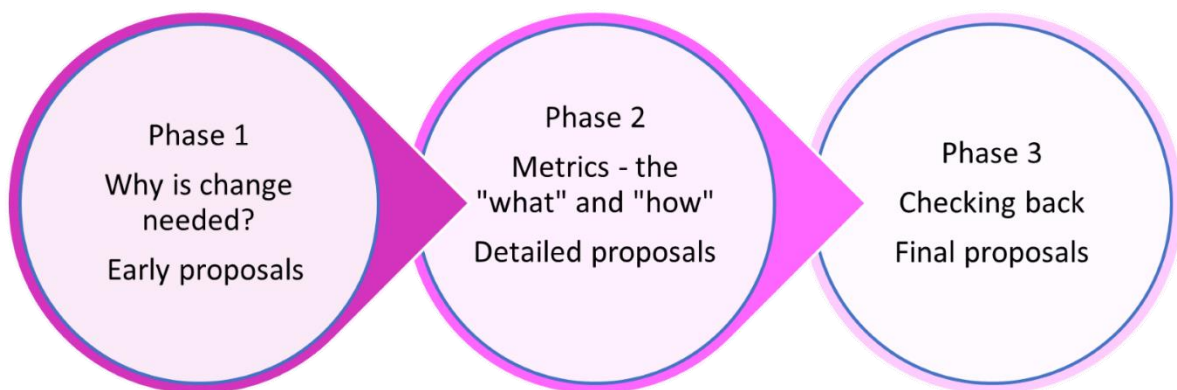

Figure 1 Project phases

Aligning to the scope of the DfT and MHCLG, this report relates to Transport Assessments (not appraisals) and Transport Statements in England, for Local Plans and in support of site-specific developments. It does not propose changes to National Planning Policy for Waste, and its associated transport assessments. Whilst the content of the report could be applied in other geographies, the legislative frameworks may differ.

Phase 1 recommendations were shared with DfT and MHCLG (DLUHC at the time) on 13 November 2023 and have since also been presented to DfT, ATE, NH and Homes England at the DfT offices on 29 November 2023.

As a reminder, the Phase 1 report contained three 'big asks' for policy and practice:

1. Start earlier and work together better:

Transport and accessibility evidence must be used earlier in the planning process than it currently is, and planning and transport authorities should work more closely on this. The evidence should strongly influence:

- site selection for Local Plans so that development is put in the right place at the right density. We cannot determinedly strive to meet housing targets at the expense of transport considerations and still expect to meet our policy goals.
- master planning for site-specific TAs so that development has the best chance of delivering policy goals and outcomes. Sites of any meaningful size that cannot offer transport choice, by which we mean good public and active travel options, should not be acceptable.

2. Update and integrate policy and guidance to deliver genuine transport choice:

Policy and guidance need to be updated and made more consistent. They should set out the role of TAs in relation to decarbonisation and other national, regional, and local policies, and be explicit about the interaction between TAs, Local Plans and Local Transport Plans. Specific changes to policy and guidance wording are set out in the Phase 1 report.

All the relevant policies should require a Vision Led approach and set out how this vision could be developed between stakeholders – we have suggested a two-tier approach in Chapter 3 of the Phase 1 report.

Policy must be rebalanced so that active and public transport modes are viable and realistic options so that residents, workers, and visitors could choose these and would not be reliant on only the private car.

3. Measure more things and measure them better

It is strongly felt that TAs focus too heavily on measuring congestion and fail to sufficiently measure almost everything else.

TA guidance should require proportionate multi criteria assessments - balanced towards policy goals and the key themes - and put forward methods for each of the criteria dependent on scale and type of development (e.g., urban/rural development). Where evidence on these key themes is in other assessments (e.g., Environmental Impact Assessments, Sustainability Appraisals, Strategic Environmental Assessments and Health Impact Assessments), the assessments should inform each other and be reflected in the TA, as transport is likely to be one of the biggest factors impacting these other assessments.

The Vision Led approach should be tested through scenarios, and guidance should set out how this could be done, proportionately, for different types of development. The default should not be "the worst case" because this will lead to providing for the worst case and will not support delivery of policy goals. The role of the Travel Plan should be strengthened to monitor and manage delivery of the vision.

DfT should provide data and tools to support practitioners undertaking these assessments and make the outputs easier for everyone to understand and interact with. It should also look to improve guidance on modelling, considering the role of transport models in this new multi criteria assessment, and support practitioners to understand the right approach for their TA.

Phase 2 process

Phase 2 for the Working Group involved a series of online workshops, each focusing on a key theme identified in Phase 1.

These six themes are:

1. Carbon
2. Health
3. Safety
4. Accessibility
5. Trip generation and
6. Post-planning considerations (travel planning)

Each workshop featured a presentation/s by relevant experts in the area, set out in Table 1 below.

Key theme	Presenter/s
Carbon	• Tom Gold – WSP • Martin Wedderburn – Wedderburn Transport Planning
Health	• Lucy Saunders – Healthy Streets • Gavin McLaughlin – Transport for London
Safety	• Sarah Simpson – Royal HaskoningDHV • Dan Campsall – Agilysis
Accessibility	• Marco Picardi and Fergus O'Dowd – Department for Transport • Laurence Fallon – Active Travel England
Trip generation	• Lynn Basford – TRICS • Will Pedley – Oxfordshire County Council • Nicola Lodge – ITP/Royal HaskoningDHV
Post-planning considerations (travel planning)	• Stephanie Meyers – ITP/Royal HaskoningDHV • Jo Hamment – Hampshire County Council

Table 1 Phase 2 presentations

Following the presentations, the workshops split into two breakout rooms, one focused on Local Plan TAs, and the other on Site-Specific TAs. Both breakout rooms followed pro-forma to ensure all relevant information and ideas were captured. At the end of the workshops, the breakout rooms reported back their findings to the whole group.

The pro-formas asked questions to support the future development of improved policy and guidance as follows:

- What type of assessment do we do now, and what are the issues with this?
- What type of assessment do we want to do?

- What would the assessment need to cover, and how?
- What examples are out there now?
- What is the measure of success/what will be acceptable?
- How would you present this to the audience?
- Does policy let us do this? If not, what needs to change?
- How does this meet the vision (the three big asks)?

Phase 2 recommendations

For each of the metrics considered, we have sought to identify practical tools to assist practitioners with the preparation of TAs at both the Local Plan and site-specific level.

The Working Group recognises that, particularly for site-specific TAs, clients may pressure practitioners to present a site in the best light. This leads to TAs that present an incomplete picture of the transport elements that are important to us. Going forward, we seek policy and guidance that enables/requires practitioners to be impartial and candid when reporting on the transport impacts of a development across a range of objectives.

It is also acknowledged that there is not always the opportunity to deliver developments in the most advantageous of locations to satisfy the transport objectives. A TA should not play up the positives and stay silent on the negatives. It should make clear what is necessary to make a particular development acceptable in transport terms. A TA should provide an analysis of what must be done to satisfy the NPPF 'tests', and how much of this can be delivered by a developer (either physically or by financial contribution). Beyond this, a TA should identify, where appropriate, other improvements that could further achieve the (national/regional/local) objectives, but which are currently outside of the remit set out in the PPG of the development being considered. This will provide meaningful input for other parties in bringing forward other development and/or transport improvement schemes.

Within this context, the Working Group discussed the following elements, and to what extent, and how, these can be measured within TAs: carbon, health, safety, accessibility, and trip generation. The Working Group also discussed post-planning requirements, and specifically, the potential future role of Travel Plans.

The recommendations of the Working Group are clear that assessments should be proportionate to the type and scale of development. The pro forma that follow essentially set a specification for new metrics that should be included in future TA guidance.

Carbon

[Note: This pro-forma, and the wider Fixing TAs project, uses carbon as shorthand for all greenhouse gases.]

The consideration of carbon is not absent in the transport planning sector, but the assessment of carbon impacts is largely overlooked in Local Plan and site-specific Transport Assessments (TAs). The inclusion of carbon considerations within TA work is important in the context of national, regional and local policy and objectives. A summary of the Working Group's discussions on how carbon could be considered in TAs is set out herein.

The Phase 1 report highlighted the gaps in carbon assessment in current TA practice. The findings of the Working Group were that neither Local Plan TAs nor site-specific TAs include a meaningful assessment of the carbon impacts of a development. For Local Plan TAs, there was an expectation that carbon assessments would improve with the rollout of the Quantifiable Carbon Reduction (QCR) tool, expected to be published as part of DfT's forthcoming guidance. However, we understand that this is aimed at Local Transport Plans and not yet adapted to apply to TAs; an adaptation would seem sensible and achievable.

For site-specific assessments, the Working Group felt that carbon should be covered in a holistic way for the whole development, rather than split out into different assessment documents (see below). Notwithstanding this, TAs should, where appropriate (given the type and scale of development) be prepared in collaboration with the wider carbon assessment undertaken for planning and should include reference to this. Where appropriate, TAs should identify the change in carbon emissions resulting from the change in travel patterns created by the development.

The barriers to including carbon analysis within TAs are complex. There is a lack of expertise in the transport planning sector coupled with a lack of guidance and best practice. Further, there is difficulty in defining the scope of a carbon assessment for TA:

- Is this limited to vehicle tail pipe emissions, and over what geographical area?
- How do you account for wider changes in travel patterns that arise from a development in the communities beyond it (such as shorter journey distances or mode shift)?
- Do you include embodied carbon, and is this limited to new vehicles?
- Do you include the carbon impacts of construction?
- Is the assessment comparative – for example, housing must be built, and should the assessment be relative, such as a comparison of carbon impacts if built in one location rather than another, rather than not being built at all?

The principle of assessing the whole life carbon (WLC) impacts of transport schemes is recognised in TAG, the DfT's web-based Transport Analysis Guidance. TAG Unit A3 states that WLC impacts include "capital carbon (emissions associated with scheme construction), operational carbon (emissions associated with scheme operation and maintenance), and user carbon (emissions associated with scheme users, such as changes in emissions due to

mode shift)." However, there is no guidance on how this methodology could be used to assess the WLC impacts of the transport infrastructure, operations and user travel associated with new developments with TAs.

The Working Group is aware that the carbon impacts of new development might be set out in a range of documents (which are not typically prepared by transport practitioners), including:

- Environmental Impact Assessment/Environmental Assessment
- Strategic Assessment
- Air Quality Assessments
- Studies looking at embodied / operational carbon at new major developments.

While these environmental and air quality assessments are often based on trip generation and assignment, the authors of the TA may not ever see the outputs and are not accustomed to interpreting them. These are also likely based on 'business as usual/predict and provide' trip generation, and mode shift and/or mitigation may not be accounted for. It may be clearer for an overarching WLC assessment to take place and for this to be informed by, speak to, and be reflected in the TA.

In relation to air quality impacts, the impacts of development are often deemed acceptable if the site is not within an Air Quality Management Area, even if the relative change in carbon emissions is significant.

What type of assessment do we want to do?

Local Plan TAs

Transport, as a large contributor to carbon (along with other factors such as re-use vs new-build, brownfield/greenfield, suitability for renewables etc) could be considered through a new WLC assessment as part of Local Plan evidence bases. There is currently no requirement in NPPF for this. This could be reviewed, and/or Local Authorities may choose to set their own requirements. This quantification should support decision making between different development scenarios. Carbon should be considered in conjunction with site selection and form a significant consideration in choosing the right package of developments to bring forward. Tools to support this (e.g. layers within the DfT's proposed Connectivity Tool) will be needed, as well as improvements to strategic models. These tools could also show how mode shift from the wider area could be quantified as a benefit when looking at the appropriate impacts and mitigation for new development. For example, a new public transport route serving a development could also have a beneficial impact in terms of carbon reduction through mode shift in existing communities beyond the site boundary.

The carbon assessment could be a formal part of the SHELAA/development scenario selection and should quantify the carbon that might be emitted in different development scenarios, and how this would change with mitigation/accessibility or connectivity improvements. A summary of this work could be contained within the Sustainability

Appraisal (SA) or within the TA, but the documents must talk to each other, with a summary provided in whichever document does not include the complete assessment. The way the results are compared and reported will require some thought; carbon is often reported annually whereas trip generation is generally reported daily, looking at different peaks. Also, unlike congestion or air quality impacts, which are more localised, it is the total global carbon emission level that policy is seeking to reduce.

Planning authorities may take different views on whether to apply carbon thresholds beyond which carbon emissions are unacceptable, e.g. relative to national targets (as for embodied and operational emissions) or simply no worse than average of existing travel in the authority area.

Site-Specific TAs

The detailed assessment of a developments' WLC and its mitigation could remain in other studies that support Local Plans and planning applications. However, these reports (and their authors) should work iteratively with the TA (and transport practitioners) to identify how a specific development can minimise site-specific carbon impacts related to the travel patterns of the development. TAs should summarise the travel related carbon emissions for each scenario and comment on the relative impacts.

The Working Group recognised the risk that TAs could switch from aiming to avoid only congestion, to aiming to avoid only carbon, as both lend themselves to quantifiable assessments - we therefore reiterate the point made in Phase 1 that Fixing TAs is about measuring many things and measuring them better.

What does it need to cover? How?

The quantification should include WLC emissions, comparing the development scenario with a 'do minimum' scenario. It should include impacts during construction and operation (including deliveries and servicing).

The assessment should identify all trips and purposes (not just commute), mode share, and journey distances. It should also consider whether the trips are new or displaced (more likely unless the population is growing). Assessment could be undertaken at an aggregated level, using the predicted annual travel emissions per person, per household, or per unit of gross floor area, compared with benchmarks or defined targets. A monitor and manage approach could be supported through strengthening the role of Travel Plans e.g. through travel surveys and TRICS SAM, to capture journey purpose, mode, and distance.

It should be noted that most forms of non-residential development will already have some form of carbon reporting obligation. For example, business travel and commuting are already classed as scope 3 emissions for the purpose of Environment, Social and Governance (ESG) reporting. Collecting trip data could also have cross benefits for measuring other metrics e.g. physical activity for health assessment.

If unacceptable carbon impacts are identified, the TA should look to mitigate some of the impacts through the transport strategy. Quantitative assessments could look at options for mitigation, but this would rely on having a better understanding of the mode shift (or trip reduction) that could result from various interventions. As above, TRICS could be a good starting point, but a wider and publicly available empirical evidence base could support other measures that may not yet have been delivered (or delivered at scale) in this country.

The QCR tool, that is currently aimed at Local Transport Plans, could be adapted to provide detailed guidance, particularly on mitigation/accessibility improvements. As the profession is new to carbon assessment, training, and access to expertise/authorities with experience should be enabled.

The quantified assessment of carbon will inevitably result in estimations, not actual figures, and so should be accompanied by commentary to highlight this point and results should be explained in a way that is understandable for the layperson.

The assessment of carbon within a TA should be proportionate and relevant to the scale and type of development being proposed.

What examples are out there now?

The Working Group is aware of very few examples of TAs that include a carbon assessment. Some tools have been developed within consultancies (e.g. WSP), and members acknowledge that Sub Regional Transport Bodies may already have developed their own methods. Examples within strategic models were discussed, but these only reported on total emissions from travel, and were only used for very large sites.

There is some methodology within TAG and the QCR toolkit to measure the carbon impact of development schemes, but not for Local Plans. There is opportunity to develop these approaches for use in Local Plan and site-specific TAs, with a level of detail and complexity that is proportionate to the development being considered. IEMA also has some practical guidance for reducing carbon within development plans, and data on baselines and "with policy intervention" impacts, provided by the Climate Change Committee.

What is the measure of success – what will be acceptable?	
Acceptable	Unacceptable / severe
• Net zero, carbon negative and carbon neutral development would be ideal but in practice this could be hard to achieve. Low carbon development may be acceptable, depending on the relative impacts. As with many other metrics, the Working Group did not support the concept of a binary or prescriptive threshold for what is acceptable. • A net zero overall position may be acceptable e.g. whereby new development delivered accessibility/ connectivity improvements which reduce trips from neighbouring areas. This would be very difficult for isolated development, or a new town, but supports the case for densification of existing areas. • Measures must be tied to the Local Transport Plan – helping to meet its target. As stated in Phase 1, the link between Local Transport Plans and Local Plans should be strengthened in the NPPF. • The TA should show how carbon reduction is being considered and maximised through new development. • The level of assessment of carbon within a TA should be proportionate and relevant to the scale and type of development being proposed.	• Failure to meet thresholds set by local authorities for transport user carbon emissions. • Poorly located, remote, car dependent development which perpetuates car dependence. • A subjective or unquantified assessment. • No mitigation (if required) proposed for carbon, in either the TA or the Sustainability Assessment. • Carbon offsetting through non-transport measures. Reducing car trips has wider benefits than just carbon – for example, on-site energy production should not be used to offset measures to reduce car use. • Overreliance on the move towards electric cars should not be accepted. Forecasted take up is not certain, and electric cars still take up the same amount of space and have wider impacts beside tailpipe carbon emissions.

How do you present this to the audience?

The Working Group felt that this could be a subject that is of interest to people, given the current (political) climate. It could be presented as an opportunity for community engagement. Scenario testing could show the relative impacts of different strategies and demonstrate, for example, that carbon impacts can be worse even when the road network appears to be operating satisfactorily (e.g. in rural areas where there is highway capacity, but trips are longer). National framing on the importance of carbon reduction must be included – NPPF or TA guidance could support this, as well as a wider long-term public education campaign.

Whilst carbon quantification should be technically sound, the way it is presented should steer away from overly technical language which is not easily interpreted by officers, members, other practitioners, and the public. The "Our future town" project undertaken by various transport bodies and local communities, with the Royal College of Art shows some examples of how messages around transport can be communicated well. Dashboards and maps summarising cumulative impacts of different development packages or scenarios could be used.

Does policy let us do this? If not, what needs to change?

There is nothing in policy which prevents us from measuring and mitigating carbon within TAs, but there is very little to obligate us to it. It is already considered for transport schemes through the ESG reporting required by TAG, and investors will increasingly start to expect developers to quantify the transport user carbon impacts of their projects. Also, very large numbers of local authorities have declared climate emergencies and have carbon reduction targets and policies. Those who accept developments which have not considered carbon could find themselves facing the same legal challenges regarding planning policy currently being brought against national government e.g. by Client Earth.

Policy and guidance need to be updated and made more consistent. They should set out the role of TAs in relation to decarbonisation and other national, regional, and local policies, and be explicit about the interaction between TAs, Local Plans, and Local Transport Plans.

Policy should be clear on what is measured (e.g. emissions from which sources; what constitutes 'new' emissions; how are diverted or displaced trips dealt with). Guidance should be clear on how it is measured and what thresholds are appropriate/acceptable. There seems to be some discussion that the QCR tool will resolve this, but publicly available information to date does not make it clear that QCR will cover TAs (instead it is intended to cover Local Transport Plans).

Stronger guidance on the role of Travel Plans could provide a tool to monitor operational carbon of development over time.

There is a potential conflict with developers who may have their own targets to adhere to, though if policy targets are more onerous then these should be used.

As per Phase 1 report: Annex 2: Glossary - Sustainable transport is defined as: "any efficient, safe and accessible means of transport with overall low impact on the environment, including walking and cycling, ultra-low and zero emission vehicles, car sharing and public transport." This is too wide a definition. While ultra-low and zero emission vehicles are better than fossil-fuelled cars, in terms of local carbon and other emissions, the embodied carbon associated with their manufacture means they cannot be defined as sustainable. The expansion of transport infrastructure required to meet the needs of increasing car use is unsustainable. Sustainable Transport should therefore be defined as active travel and public transport.

How does this meet the vision?

Three big asks:

Start earlier and work better together:
Carbon quantification and mitigation should be considered early on, through development scenario selection in local plans, and, for site-specific TAs - when design teams are appointed, when decisions are made about site layouts and infrastructure, and when the scope of assessments and studies is established.

Update and integrate policy and guidance to deliver genuine transport choice:
Carbon and emissions should feature more prominently in national and local policy, and guidance is required on how transport practitioners can understand the carbon impacts of new development (particularly for vehicles).

Measure more things and measure them better:
Carbon/energy/climate consultants and transport planners should iterate their work to ensure that carbon implications from traffic generation are considered and mitigated. Freely available tools should be created/shared so that practitioners can undertake this work with consistency and without undue burden.

Health

The way that streets are designed, managed, and used has a profound effect on the health of the people who use them. Healthy streets are streers where there is the opportunity for all people to walk, wheel, cycle, socialise and play as part of their daily lives in safe, relaxing, and unpolluted environments. However, the experience of the Working Group was that Transport Assessments (TAs) rarely include an assessment of the implications of development on health.

The complex web of health outcomes associated with the transport elements of development are not well reflected in the isolated focus on individual exposure risks such as air pollution or road danger. Some of the most important elements are missed out of TAs altogether, for example: daily physical activity and social cohesion. The exception to this is within London, where Healthy Streets audits are required for site specific TAs.

There may be a Health Impact Assessment (HIA) associated with a Local Plan, or a planning application for a development, and these are often reviewed by Local Authority Public Health teams as consultees. These are not always completed, and they do not tend to cover the detail in the transport proposals that is important for delivering healthy street environments. Also, Public Health professionals may feel that it is beyond the scope of their expertise to comment on the detail of street layouts, which can be central to the impacts of transport on health in new developments. Furthermore, HIAs are often carried out at a single point in time and miss the opportunity to achieve meaningful changes within schemes/plans through design or transport mitigation measures – this would require an iterative approach, coordinated with transport planners.

Some issues pertinent to population health may be covered within a Strategic Environmental Assessment (SEA) but assessment of transport impacts on health are limited. For example, HIAs and SEA/Environmental Impact Assessments (EIAs) may cover air quality and noise impacts and road collisions, together with data on demographics and health conditions, but these are not tied back into the TA work.

Some developments may be accompanied by an Equality Impact Assessment (EqIA) which would look at the impacts on people through the lens of protected characteristics. These are unlikely to cover a full range of health impacts or impacts that are not distinctly related to protected characteristics such as transport poverty.

Road safety tends to be assessed in TAs (see *s*afety pro-forma), but this is not referred to as a health issue. Likewise, sustainable access and congestion are measured, but they often do not refer to their associated health impacts.

There are also significant issues in how crossing points are considered, which do not align, for example, with ATE's toolkit definitions of crossing facilities – more on this below.

Overall, the Working Group recognises that transport planners are not fully versed in the impacts of transport on health, or what actions would result in the best outcomes for health. The group voiced a lack of knowledge and confidence in how to measure health impacts and what proposals would be most beneficial for health. This is complicated further by the understanding that the impacts and solutions will be different depending on the demographics of people accommodated by a development and their health needs.

What type of assessment do we want to do?

Quantitative

The extent of quantitative assessment should be proportionate to the type of TA (Local Plan or site-specific) and the type and scale of development proposed.

Quantitative assessment could include likely change in casualties, air pollution, accessibility scores, traffic speeds, mode shift, quality scores for routes etc. Much of this would be covered in a modified version of the Healthy Streets audit.

Measuring minutes of physical activity could be beneficial, particularly for testing best locations for sites, and connectivity packages, but also for Local Authority Health Policies; this could perhaps build on the existing Sport England Active Lives survey.

A vision zero approach could also be considered, where no deaths or injuries are considered acceptable.

Qualitative

TAs could include assessments of the quality of routes, and a form of EqIA (e.g. based on demographic data from Local Authority Joint Strategic Needs Assessments) to ensure that all users have been considered.

What does it need to cover? How?

Both Local Plan and site-specific TAs should focus more on the health impacts arising from the transport elements of development. This could include air quality, safety, accessibility for different users, severance, noise, and wellbeing (feeling safe and welcome to use a space). Local Plans could assess air quality as part of the SEA, bringing in specialists to complete this work. A method for assessing air quality should be established that can be used in all TAs for developments of a significant size; this should look at all levels of air pollution, not just Air Quality Management Areas (AQMAs).

Both types of TA could review health population data from Joint Strategic Needs Assessments and describe the population of the area and how the transport elements of development could impact on them. For example: is there a higher proportion of older people, or children, or people with respiratory conditions? How would the proposed development impact on them and what could be done to ameliorate the impact?

Recognising the lack of confidence in this topic, we suggest that tools are developed (using existing proxy data such as traffic speeds, volumes and trip origins and destinations) to make this assessment easy for transport planners. For example, tools could help transport planners to determine the different health outcomes (such as minutes of physical activity achieved/achievable) of choosing different site allocations, or the range of connectivity improvements/mitigation available. Some of these elements could use measures already in use in SEAs and HIAs, bringing them into the main TA (or at least cross-reference them), but other new tools will be needed.

The test for development could be a 'net gain' in health outcomes. This could be proportionate, with even the smallest development able to contribute e.g. through adding continuous footways over the access or improving a nearby junction treatment. This would similarly improve the assessment of accessibility/connectivity, contributing to a more holistic way of approaching and assessing proposals.

TAs, and particularly site-specific TAs, should consider the quality of routes that will be accessed by users of the new developments with a focus on health impacts. Traditional traffic-based mitigation strategies could be replaced by looking at ways to increase the quality of these routes (in the context of air quality, safety, accessibility for different users, severance, noise, and wellbeing etc). Organisations including TfL, ATE and Healthy Streets have published toolkits that could be used/adapted to support this, but further elements should be added to ensure that the whole human experience is covered. For example, shade and shelter will be needed more and more with the changing climate, and the effects of this will be felt more by specific groups such as older people. London authorities already use a version of the Healthy Streets checklist to support their TAs, and their process is currently under review to ensure it is being used in the most effective way by developers.

There is scope for information to be drawn into the DfT's new connectivity tool; a health layer could be added, using known proxy data to map the health level of streets (akin to the Healthy Streets mapping of London, Barcelona, and other cities, available at healthystreets.com), and air quality mapping at a similar geographical level. It is acknowledged that most of this data will be modelled, but showing only AQMAs would not be acceptable. Strategic Transport Models should also look to incorporate health data and assess impacts. The group is aware that Cambridge University (James Woodcock) is currently investigating this. Development should be located where a good score can be achieved; and it should seek to improve on the existing score.

All development proposals should have 'healthy' masterplans and targets that are proportionate to the type and scale of development. This should be set out, as appropriate in the TAs.

What examples are out there now?
Examples of tools and guidance for assessing health impacts in TAs, or which could be adapted for this, include: • Healthy Streets audits/mapping and TfL's version of this tool for developers; • Health Impact Assessments and health related chapters in Strategic Environmental Assessments; • Accessibility assessments; • ATE design tools (including the planning application toolkit, the crossing selector tool, and the route cross-section tool); • Cambridge University is developing strategic modelling approaches for transport and health; • Scenarios for different levels of movement by different modes in Decide and Provide; and • WHO Health Economic Assessment Tool (sometimes used for schemes). Other tools applicable to site masterplans include Building for Healthy Life, Streets for Healthy Life, Well Community Standard, and the Place Standard Tool. London's Mayoral Transport Strategy includes SMART targets and requirements for monitoring through boroughs – this approach could help ensure delivery elsewhere. On the issue of crossing provision, as there is no other national metric, the requirement for new crossings will almost certainly use a measure called PV^2, which has not been promoted by the DfT for decades. This is based on the number of people currently crossing a road, which, as well as failing to count new people from proposed developments, does not account for the reasons many people may not already be crossing, for example the road is perceived as too dangerous to cross. This method does not align with Healthy Streets or the new ATE toolkits, and many transport planners recognise that this metric is outdated, but in lieu of anything else, it is still being used. Mark Philpotts, formally of Sweco, has developed an alternative methodology that has been presented at conferences in 2023, but this is not yet general practice, and does not offer the same pass/fail criteria as PV^2.

What is the measure of success – what will be acceptable?	
Acceptable	Unacceptable / severe
• An acceptable TA will be one that assesses the impacts of the development on the local population's health and, particularly in the case of site-specific TAs, assesses key routes that will be used. Site specific TAs should identify any showstopper barriers to healthy routes.	• Any assessment that does not include health, using objective data to assess key metrics e.g. safety, and clean air. • Any assessment that does not propose improvements to streets that would contribute to improved health outcomes.

• An assessment should consider the different factors that impact health e.g. air quality, safety, accessibility for different users, severance, noise, and wellbeing (feeling safe and welcome to use a space). This could be measured using proxies e.g. traffic volume and speed data, availability of suitable crossing points etc. • An assessment that seeks to measure the impacts and to mitigate them, striving for an overall net benefit to health. • An assessment that seeks inclusion in transport solutions and proposals based on clear health and inequality measures. Transport options should strive to reflect the needs of the diverse communities that they serve. • The level of assessment of health impacts within a TA should be proportionate and relevant to the scale and type of development being proposed.	• Any assessment that leads towards perverse outcomes i.e. it's safer to be inside a car than outside a car. • Any assessment that increases exclusion or inequality in the measures it proposes i.e. provision of less safe crossing opportunities in favour of maintaining certain traffic speeds or capacity.

How do you present this to the audience?

Simply. Different aspects of health, such as safety and feeling safe, noise and pollution are likely to be the most directly relatable aspects for anyone reviewing a TA – from professionals to neighbours of a given site. Plain language should be used, along with mapping, scoring (such as healthy streets score cards which use quantitative measurements as proxies of the human experience), and descriptions of impacts and improvements for different types of users.

TAs should seek opportunities to improve health outcomes rather than merely justifying that development will not have a negative impact on health (for example, by not increasing road safety hazards). Many improvements that a TA will cover, such as new crossing points, will have a direct impact on health and should be reported in this way.

Policy would need to be amended to include an explicit requirement to measure health impacts, and new guidance, methodologies and tools would be required. Capability building may be required to help transport planners understand how to measure the impact of transport on public health.

A net gain in health could be considered in the same way biodiversity net gain has recently been introduced. A 'health harms roof levy' could also be considered to help Local Authorities meet their objectives. This must not duplicate other requirements, such as contributions towards active travel and public transport, and it must meet the tests for planning obligations set out in the NPPF.

Health, urban design, and transport design chapters of NPPF should be brought together – these themes should be linked more closely as transport consultants mainly focus on Chapter 9: Promoting sustainable transport. Chapter 14 could also be strengthened to reflect the connections between a changing climate, and health, and the impact transport can have on these.

A replacement for PV^2 criteria should be developed.

| How does this meet the vision? |

Three big asks:

Start earlier and work together better:
The health of the local population and that of the users of a development should be considered at a very early stage. Collaboration with local authority public health teams should support thinking about site allocations (for Local Plan TAs) and masterplans and mitigation/improvements (for site specific TAs). The longstanding issue of closer collaboration between transport, planning and health within local authorities could be challenged through a requirement for all three authorities to work together in assessing their co-dependencies.

Update and integrate policy and guidance to deliver genuine transport choice:
Policy should better reflect the wide range of health impacts of transport and start describing road safety as a public health matter. Capability building for transport planners to understand more about health, and for public health practitioners to learn more about transport would be very beneficial. A net gain in public health metric could be considered in the planning system.

Measure more things and measure them better:
New/adapted guidance, methodologies and tools should be developed for use in assessing health impacts within TAs. These should cover air quality, safety (also see the *safety* pro-forma), accessibility for different users, severance, noise, and wellbeing. Strategic models

and the DfT Connectivity Tool should be adapted to measure health impacts and test different scenarios on health outcomes. Freely available tools should be available so that practitioners can undertake this work with consistency and without undue burden.

Safety

The impact of development on safety is often referred to within TAs, but the Working Group felt that the general approach to this is unsatisfactory and that there is rarely a consideration of safety beyond roads.

Typically, TAs include a review of personal injury collision (PIC) data (police 'STATS19' records), for a three or five-year period, for a given study area. This allows for some analysis of trends or clusters in recorded incidents, but the use of STATS19 data is limited. It does not include damage only incidents (i.e. no injury) and there is no scope to consider 'near misses.' The detail included in the recorded description of incidents varies, and for some records it can be difficult to understand what actually happened. Even the provision of data varies as authorities disseminate this in different ways, with varying levels of usability (some information redacted; some information in Excel/some in PDF; some with maps/some without). Very few STATS19 records refer to road layout as a contributory factor (reportedly because of limited training time for police officers in the completion of these forms) and the entries often lead transport planners to blame human error. This is reflected in use of the word 'accident' which suggests a crash could not have been avoided. There are also inconsistencies with how the data is interpreted - what is a 'good' record?; what is a cluster?; where should analysis and improvement be focused?

The current approach for reviewing safety is also flawed because it does not encourage a review of the bigger picture. Some locations may have low numbers of recorded PICs, but this could be in part because people walking, cycling, and wheeling actively avoid the location because of the perceived danger. There is no record of 'near misses.' The approach does not lead transport planners to think about safety as result of the systems we work in/deliver. Forecasting of potential outcomes of schemes are not fully captured, for example – the safety implications of new infrastructure, or of more people using a route which is currently lightly used/trafficked.

Furthermore, there is rarely any assessment in a TA beyond 'road safety' – such as the safety of footpaths or cycle routes that will be used by occupiers of a development or local communities. This omission has implications in terms of personal mobility and opportunities for active travel (and health outcomes) as well as in terms of equality, diversity, and inclusivity of schemes (as some people will not use certain routes).

What type of assessment do we want to do?

Any assessment of safety should include both qualitative and quantitative analysis. On its own, qualitative analysis can lead to subjectivity in an area where this approach can be problematic, but there will always need to be professional judgement to avoid binary decisions and thresholds. Quantitative analysis can be thorough and comprehensive, whilst still presenting and commenting on factual information, but can, if presented alone, miss the bigger picture.

What does it need to cover? How?

An analysis of safety impacts within TAs should be more holistic, including perceptions of safety and risk, rather than just a review of PIC records. Where appropriate, the assessment should extend beyond just 'road safety' and should encompass aspects of safety that we do not currently look at (including safe systems). It would also be useful to have more information and/or a way of understanding the broad impacts of different interventions on safety as practitioners, i.e. not just relying on a road safety audit (RSA).

The assessment of safety within TAs could extend, where appropriate, to consider the following elements that affect travel to, from and within a development (and not just on or alongside roads):
- Personal security – acknowledging how this might vary for different people, including children, older people, people with disabilities, women;
- Health and environmental safety – overlapping with the Health, Carbon, and Accessibility pro-formas, e.g. air quality (particularly near schools for example), noise pollution from traffic, and opportunities for active travel; and
- Psychological safety – including the perception of safety and providing clear and intuitive wayfinding signage to reduce anxiety and confusion.

The assessment of safety within a TA should be proportionate to the type and scale of development. There are existing tools that could be used, or adapted for use, in TAs, such as iRAP and Healthy Streets. These look at elements of safety associated with transport infrastructure and can help identify the safety impacts of changes and improvements. They enable a quantitative analysis while also requiring an accompanying qualitative analysis and commentary (and can be misused or misinterpreted if the practitioner is not trained in their use). A focused form of 'healthy streets' assessment could be incorporated into all forms of TAs.

Any future data or tools should be freely available and allow for consistency of use and interpretation. TA guidance should clarify appropriate study areas and study periods for differing scales of assessment, proportionate to the development or study in question. There is a need for capability and skills building amongst transport planners to equip them to use the tools that are (or will become) available to analyse the data and identify the best outcomes of development in safety terms.

What examples are out there now?
Older tools like COBALT could form part of the assessment and do provide some thresholds as to what would be expected/acceptable on a given type of road, but such tools are based on STATS19 data (which is problematic when used without wider consideration of safety matters). An improved method might consider road features and the mix of traffic and how these things impact on safety and perceptions of safety – existing tools like iRAP and Healthy Streets could be a good starting point. TfL requires a Healthy Streets audit of new street infrastructure, and this covers the factors that influence safety, such as speed, volume of traffic, crossing points etc. The Working Group was not aware of any other examples outside of London that go beyond the standard reporting of STATS19 data. The latest IEMA guidance (published since our session) promotes iRAP as one methodology for assessing the impacts of a development on road safety. What other documents/assessments does it link to?   - Air quality assessments   - Equality Impact Assessments   - LCWIPs (and their consultation feedback if available)   - School Travel Plans (e.g. survey responses showing where parents worry about their children walking to school)   Road Safety Audits are often undertaken post-planning when discharging conditions rather than during the planning process. This can separate considerations of safety from the core approach in the TA.

What is the measure of success – what will be acceptable?	
Acceptable	Unacceptable / severe
- We must retain scope to apply professional judgement on what is 'acceptable' as there is a risk of overly simplifying a complex and critical issue. - Numerical measures such as those in Healthy Streets and iRAP are helpful and could form the basis of a measure of success, alongside professional judgement (fostered through capability building in the industry). - A safe systems approach looking at risk, not just absolute figures – this	- An assessment that is solely focused on PIC data, looking to demonstrate there is no problem to resolve, should not be acceptable. - Improvements/schemes which worsen safety in favour of more capacity should be unacceptable. It is suggested that improvements which do not actively improve transport related safety could also be unacceptable.

is most important at the Local Plan level as it can influence the approach taken to development and mitigation across a wider area. • Aiming for Vision Zero. • The level of assessment of safety impacts within a TA should be proportionate and relevant to the scale and type of development being proposed.	

How do you present this to the audience?

The data should be presented transparently and clearly. There is a risk of overly complex analysis and presentation. More visual outputs (with accompanying text) are preferred to pages of tables and statistics.

Does policy let us do this? If not, what needs to change?

Yes, policy lets us do all the above, and highway safety is explicitly mentioned in the 'severe test' (Paragraph 115 of the NPPF). However, guidance is needed on how to assess the safety impacts of a development in a holistic manner (i.e. beyond just 'road' safety), and to provide some consistency in how to analyse and interpret safety data.

Local Plans should include a policy on improvements to travel safety (including road danger reduction). Highway authorities should have strong policies on travel safety (including the perception of safety). To support this, Infrastructure Delivery Plans and Local Transport Plans could strengthen the approach and set out the types of actions that may need to be undertaken.

How does this meet the vision?

Three big asks:

Start earlier and work together better:
Safety impacts should be considered early in the site selection process to identify areas of risk/existing problems and to consider the potential schemes and funding necessary to mitigate increases in trips (arising from new development). In site-specific TAs, travel safety improvements should form a core element of the mitigation package and/or S106 and CIL contributions; the potential schemes and costs associated with improvements need to be identified early on.

Update and integrate policy and guidance to deliver genuine transport choice:
Safety impacts of development should be given more weight in policy and more thorough guidance and training is needed for practitioners on how to measure it, what data to use, what is acceptable/constitutes 'success', and how to improve travel safety through design. TA guidance should clarify appropriate study areas and study periods for differing scales of assessment, proportionate to the development or study in question.

Measure more things and measure them better:
Safety impacts need to be measured better, and often measured more. Industry-wide reliance on STATS19 data, subjective analysis, and practitioners with limited experience in safety analysis can lead to inaccurate or biased conclusions that do not holistically consider perception, risk, and danger. There are existing tools that could be used, or adapted for use, in TAs, such as iRAP and Healthy Streets. Any future data or tools should be freely available and allow for consistency of use and interpretation.

Accessibility

Accessibility (sometimes also called connectivity) is almost always covered in both Local Plan and site-specific TAs, but the quality and nature of the assessment varies significantly; there is little consistency.

For Local Plans, accessibility is considered both within and ahead of the TA at a high level. Ahead of the TA, access is reviewed through the SHELAA process and there is very little consistency on what good looks like, or which trip attractors are included – as described by Sustrans here.

Historically, Local Plan TAs have identified improvements/mitigation that add highway capacity, with an underlying assumption that any site can be made accessible, when they often can't – this must change. A consistent method would improve the assessment of this metric significantly.

For site-specific TAs, good assessments consider routes to a range of key origins/destinations, by all modes, and look at the length and quality of those routes. These routes are presented in mapping and described with commentary, identifying where improvements are necessary. Less good assessments do not fully consider the likely journeys of site users; do not consider route quality; present poor mapping (e.g. using 'as the crow flies' distances); or do not present anything substantive at all.

There is no current agreement or consistency within policy on what good accessibility looks like, with many practitioners relying on older CIHT guidance, using maximum acceptable distances; using ATE's new planning application toolkit with shorter acceptable distances; or using something halfway in between. ATE's toolkit is a positive step towards defining "good" but is arguably too detailed for Local Plan TAs, with something shorter needed, and some group members felt it was too binary for site-specific assessments [we note that this just been updated].

GIS software and other applications such as TRACC, Podaris and PTALs are sometimes used to support this metric, but the applications are not freely available, or in the case of PTALs, not applicable across all of England. DfT has presented a beta version of its new Connectivity Tool to the Working Group, and this could be a good start in improving the assessment of accessibility in TAs.

For Local Plan TAs, a scoring system, as proposed in the DfT's Connectivity Tool, would be most useful in comparing site accessibility at the SHELAA stage and selecting sites to take forward. A higher weighting should be given to accessibility in the Local Plan evidence base, as it has significant implications for a range of other areas of evidence, including health, air quality, and carbon. Local Plan policies could specify the further detail expected in site-specific TAs. 15/20-minute return trip lengths should be added to the DfT tool.

There should be consistency between how accessibility is measured in TAs and Strategic Assessments (SAs). For strategic sites, or clusters of smaller sites, qualitative assessment should also be considered.

Sites for inclusion in the Local Plan are often agreed ahead of the TA, so any change in process will also need to relate to the SHELAA and Local Highway Authorities may wish to set guidance on acceptable connectivity scores, or provide recommended areas of search, with good accessibility, or realistic opportunity to be made accessible, to Local Planning Authorities.

For site-specific TAs, there should be a detailed assessment of accessibility which is informed, and data led. However, the distillation of accessibility down to simply numbers and calculations would not be appropriate – qualitative assessment of the quality of routes is equally as important as mapping and data. Photographs could be included to demonstrate to the local community that the consultant has been to site and understands the local area. The scope of the accessibility assessment should be proportionate to the scale and type of development.

What does it need to cover? How?

'Accessibility' needs to be defined formally so that "good" accessibility can be differentiated from "poor." It should cover an appreciation of the likely journeys being made by all users of the site, and how and whether those journeys can be made by sustainable modes. The trip origins and destinations to be assessed should also become more standardised, but with variation between land uses e.g. origins and destinations for a care home will be different to those for a school.

For Local Plans, strategic sites, clusters of smaller sites, or for areas where severe cumulative impacts have been identified, and for all site-specific TAs, the quality of the infrastructure in place to facilitate sustainable journeys should be assessed, and the identification of any improvements should be required. As well as looking at the longer journeys, like commutes, it should also consider trips that can be made within a 15/20-minute round journey, to support Local Authority ambitions for 15/20-minute neighbourhoods. It should also encompass digital connectivity. The requirements of developers to improve the accessibility of an area should be proportionate to the type and scale of development proposed and should be consistent with planning requirements.

Accessibility should be informed by and be iterative with the trip generation and assignment in the TA, so that the number of users can be quantified, and infrastructure designed accordingly. This will help to bring proportionality to assessments (also see the Trip Generation pro-forma).

Guidance on good public transport accessibility should be provided so that assessments can move away from high level network maps and move towards more detail e.g. journey times, first and last services, connections to key trip attractors, physical accessibility of stations and vehicles etc. More detailed spatial assessments of rail and bus accessibility

across a Local Plan area will be challenging without input from public transport operators/experts – the "duty to collaborate" or "cooperate" as proposed in Phase 1 should include discussions with the local highway authorities and public transport operators.

On larger sites, accessibility within the site should also be considered, feeding into the masterplan in terms of the location and mix of land uses and the routes that connect them.

All the above needs a qualitative element to account for the huge variance in quality of infrastructure and the experience of those using it. This could be informed, for example, by a 'Healthy Streets' style assessment, which unpicks the context and character of routes. A healthy streets assessment could, for example, highlight that a 500m walk along a quiet path might be more attractive than a 300m walk adjacent to a dual carriageway. It could also be supported through the development of nationally available mapping showing/scoring factors that affect the quality of user experience of, for example, walking along a street. This could include traffic speed and volume, which are some of the biggest influences on user experience, and other things which are less often mapped, like pavement width, availability of street lighting, dropped kerbs, and footway surfacing.

Within the TA, accessibility assessments should be supported by clear mapping/plans, showing routes and route quality. This might be informed by an innovation such as DfT's Connectivity Tool – which would need to be freely available and consistent for all users (as is currently planned). A method for testing journey distances from anywhere within a site, and not the site edge, for example with a choice of common site layouts would better enable this assessment.

What examples are out there now?

East Hampshire's emerging Local Plan includes an accessibility assessment which has informed site selection. It is based on the 15-minute neighbourhood concept and aims to put development in the locations which are already the most sustainable within the district.

The DfT's new Connectivity Tool, when live, could be used to show accessibility scores by different modes of transport, and how these might change with new bus routes. This addition would allow the tool to evidence the need for enhanced walking and cycling connectivity, and capture these within Local Plan site policies and infrastructure delivery plans.

There are crossovers with BREEAM and Sustainability Assessment criteria that will need to be considered.

For site-specific TAs, Walking, Cycling and Horse-riding Assessment and Reviews (WCHARs) cover parts of this in quite a lot of detail, particularly the routes alongside roads (typically principal and trunk roads). These have made positive impacts where they are

being widely used, but do not include a methodology for undertaking an audit of route quality.

LTN 1/20 includes the Cycling Level of Service and Junction Assessment Tools which help with auditing and positively impact the design of cycling infrastructure. However, these do not include a component part which helps to identify which routes to audit in the first place.

In London, Active Travel Zone (ATZ) assessments are used which do identify typical journeys/common destinations. Although TfL has experienced some issues with developers and their agents not using the tools appropriately, when used well these have positive impacts. TfL is currently updating their guidance on ATZ assessments.

ATE's new toolkits look at a range of factors relating to active travel provision and design, including considerations of accessibility. Again, this is not supported by mapping and is not yet a comprehensive tool that covers all elements of a full connectivity assessment, or all elements that impact the user experience of route quality.

TRACC and Podaris are also in use, but these are not all free or universally applicable. PTALs (and a few other regional tools) are helpful but not nationally available.

What is the measure of success – what will be acceptable?	
Acceptable	Unacceptable / severe
- Supports the delivery of the relevant Local Transport Plan and decarbonisation strategies/climate emergencies, and any goals for mode share/shift. - A comprehensive assessment considering all likely journeys by all users (including protected groups), with quantitative and qualitative analysis. - Sites which are either well-located in areas of existing good accessibility, or which demonstrate that improvements will genuinely fill 'gaps' and connect new communities (as well as benefitting existing communities). - The level of assessment of accessibility within a TA should be	- No consideration of accessibility in a TA (regardless of scale / land use). - Assessments which show remote sites generating significant numbers of users without suitable infrastructure to support active and sustainable travel. - Assessments which use unrealistic walking/cycling distances or are overly reliant on infrequent bus services. - Unrealistic assessments which assume lots of trips by sustainable travel modes but do not demonstrate the infrastructure to support it, or which propose sub-standard infrastructure, or infrastructure phased for late

proportionate and relevant to the scale and type of development being proposed. Fewer site users mean fewer journeys / destinations, so proportionality should be built into this.

- Similarly, the level of mitigation should be necessary to make the development acceptable in planning terms, directly related to the development, and fairly and reasonable related in scale and kind of the development (in accordance with NPPF paragraph 57).

delivery, and assume it will be used for journeys.

- Assessments which fail to recognise the needs of protected groups and vulnerable users – public transport services and access to them will play a big part in this for many people with, for example, disabilities.

How do you present this to the audience?

Use of a tool which has visual and quantitative outputs, but with qualitative analysis. Visual outputs will make 'sense checking' easier for officers and stakeholders.

The work should be evidence-led (in a proportionate way), with little room to 'play up' accessibility on poorly connected sites. The outputs should clearly and transparently show all information including a variety of trip attractors, not just the commute.

Does policy let us do this? If not, what needs to change?

Nothing in policy stops us doing this. Is it not specific on the need to undertake accessibility assessments but highlights the importance of prioritising active and sustainable transport and providing for attractive networks for these modes. The importance of co-locating land uses and creating walkable neighbourhoods is not mentioned in the Sustainable Transport chapter of the NPPF; Chapters 8 and 9 could be better integrated.

Final judgements on accessibility may be impacted by NPPF Paragraph 115 – LPAs have final say on planning decisions but LHAs, ATE and NH will all have different views and give different weight to their recommendations.

How does this meet the vision?

Three big asks:

Start earlier and work together better:
This comes back to locating sites well in the first place – these will have a lesser onus on improvements to/new infrastructure and so can facilitate walking, cycling and public transport journeys more effectively. Master planning work needs to consider the likely

users of the site and build-in internal and external sustainable travel networks to cater for them.

Update and integrate policy and guidance to deliver genuine travel choice:
Policy should give greater weight to accessibility over and above car use and car impacts. Guidance should be provided on how to consistently measure accessibility in England, with free and easy-to-use tools available to all practitioners to support this.

Measure more things and measure them better:
Within the Working Group the view was that most practitioners are measuring accessibility, and some of us are already measuring this well. The successes (and some challenges) of examples from London show that a refocus of assessments on accessibility can have positive impacts. An assessment methodology should be easy to understand, transparent and consistently applied, and cover the range of considerations needed to holistically measure accessibility.

A TA should provide, in an assessment that is proportionate to the development, an analysis of existing accessibility and/or what must be done to make the development acceptable in terms of accessibility. Beyond this, a TA could also be used to identify, where appropriate, other improvements that could further enhance accessibility, but which are currently outside of the remit of the development being considered. This will provide meaningful input for other parties in bringing forward other development and/or transport improvement schemes.

Trip generation

The three common approaches to estimating the trip generation of development within TAs are summarised below. For this summary, the Working Group refers to 'trip generation' as a catch all phrase to encompass both trip generation and trip attraction (noting that only residential developments 'generate trips'; other uses 'attract' them).

1. The TRICS database can be used for both Local Plan and site-specific TAs but is more commonly used in site-specific TAs. The database allows practitioners to estimate trip rates for new developments using past survey results from a range of land uses, in a range of location types. The breadth of data available in the dataset means that an average can be taken of several sites, based on the selected criteria.

   The TRICS 2021 Guidance ('The implementation of the Decide and Provide approach') guides practitioners to carefully consider the vision for, and the design of, a development and not just apply a single trip rate figure which may not support the current spatial and transport policy direction nationally or locally.

   TRICS provides over thirty years of historic data and it is for the practitioner to determine the most appropriate trip rate for the proposed land use in the proposed location. TRICS (as empirical data) provides historic trend data that demonstrates the reduction of trips for certain uses over time (this is especially the case for retail). The TRICS Good Practice Guide (which is updated annually) provides practitioners with direction on the correct use of the TRICS outputs, including site selection.

   The working group identified a number of issues with current practice, as follows:

   - The use of the 85th percentile trip rates by some practitioners is problematic and is not supported by TRICS (except in exceptional circumstances).
   - Practitioners are often directed to use the "worst case scenario" (for example, by elected representatives) - this is also incorrect (the correct site selection should ensure that this is not applied). Another common practice among practitioners is to use just one trip rate figure, rather than considering trends over time, or different scenarios.
   - If historic trip rates are high, then a new development may be built to cater for these, even if this level of trips does not align with the vision for the site, or they do not materialise.

2. Strategic transport models (typically using the national trip end model (NTEM) and land use/economic demand models) are more commonly used in Local Plan TAs. Strategic models are complex and expensive, and as a result, there may be less challenge of how the content relates to the specific model run, or how their use is

applied at a Local Plan stage. Also, given the cost of model runs, scenario planning is frequently not undertaken, with just one scenario used. Strategic models are not usually fully multi-modal (they have a focus on motorised travel and therefore routes taken by these modes) and often include fixed demand, meaning that trips cannot disappear from the network (e.g. from entirely re-routing, or from not being made altogether because of improved digital connectivity, home working etc).

The correct use of these models would be to ensure a range of scenarios are assessed against the 'central case.' This has previously been referred to as sensitivity testing, but scenario testing goes further in considering variants in trip rates against policy development. It is interesting to note that the National Transport Policy in Wales advises against strategic transport modelling due to the limitations cited above.

If the strategic transport model only contains historic transport assumptions, then it is inevitable that the planning of transport infrastructure will not consider (future) changes in travel and consumer behaviour. This will lead to outdated, non-sustainable transport infrastructure being planned.

3. 'First principles' trip generation is more commonly used in site-specific TAs. This approach is based on estimates of the numbers of people living in or travelling to a site (for example, based on Census data, direct comparator sites or operator data), the journeys that they will make (e.g. National Travel Survey data), and the likely travel modes. This is a more labour-intensive method of estimating trip generation, and it can also risk perpetuating conventional outcomes based on observed behaviours.

There has been a recent shift in guidance and practice towards a Vision-Led approach to transport planning. The key feature of a vision led TA is to define a future based on objectives, to test this (with scenarios to account for uncertainty), and to monitor it. It is important that the approach to the estimation of trip generation used in TAs reflects this. TRICS has set out a methodology for undertaking a vision led TA in their Decide and Provide guidance (which has been adopted by some authorities but by no means all). Updated guidance should be shared on the best way to reflect the vision-led approach in trip generation estimates for strategic models and in first principles assessments.

Now, where a strategic model has been used, there is almost always discrepancy between Local Plan model trip rates/outputs and the subsequent local assessment undertaken in site-specific TAs. Transport planners have tended to rely on model outputs to give all the answers to questions, but models are inexact and only as good as their inputs - "it is better to be approximately right than precisely wrong" (Glenn Lyons et al., 2024).

What type of assessment do we want to do?
The assessment should be quantitative because it is important to understand benefits/impacts of trip rates, the infrastructure needed to support them, and whether they meet the vision. It should be accompanied by commentary on how these numbers relate to real-life, realistic journeys that people on new sites are likely to be making.

What does it need to cover? How?
All assessments should start with consideration (and presentation) of: • What is/are the site(s) for? • Who will live/go there? • How often, when, and by what mode? • What are the typical travel patterns for the site on an average day? This thinking should take place at Local Plan stage and then be fed into area and site-specific work to ensure more consistency with the outcomes and vision first envisaged. Spatial planners should engage with transport planners in this process, early on. These assessments should consider the range of people and not simply a peak hour, commuting and 'white collar' assessment as this excludes trips made by people who do not work, shopping trips, education escort trips, shift work, etc. Many of these trips are not made by private vehicle, and so improvements that focus on accommodating the car in the peak hours do not improve the journeys of everyone else. Historic trip generation data from existing sites should be used for learning but should not dictate trip generation for future scenarios without further consideration. The three methods identified provide relevant 'base data' that can be built upon. Proof that the vision is being met as the site progresses (linking to Travel Plan/monitoring and managing) would help to further improve and refine trip generation calculations in the future. A requirement for TRICS SAM surveys (where appropriate, see travel plan pro-forma) would ensure that more sites enter the database, and start to shift the dial to include more sites with highly sustainable outcomes. Information on approaches adopted by exemplar/precedent sites should be published, promoted, and made available to all, to help understand a move away from the use of historic site data alone. This could take the form of a database of how modal shift has been achieved at these places. It should be recognised that this probably goes beyond most of the sites that are currently in TRICS. The trip generation should feed into the infrastructure that is needed to support that site, both at Local Plan and site-specific levels, and could link to the monitor and manage approach (see Phase 1 report). A higher mode share/trip generation by active modes could justify a greater level of investment in active mode infrastructure, and a proportionally lower investment in road capacity building. In this way, the active and sustainable trips should not be either neglected or used as an 'excuse' for lower investment overall in transport infrastructure. This can form part of an integrated and holistic strategy in the TA.

Modelling the impact of development trip generation should be proportionate to the type and scale of development. Where a range of potential trip generation scenarios are to be considered, this should not place an undue burden on the assessment process. For example, for site-specific TAs for smaller scale/lower impact schemes, potential scenarios should be discussed between practitioners and decision makers early in the process and the most likely scenario should be identified and assessed (rather than multiple scenarios). For larger sites or plans where it is appropriate to assess multiple scenarios, it should be clear what impacts need to be mitigated; and this should not be for the 'worst case' in terms of vehicle impacts. The purpose of the scenario testing should be clear – for example, to understand the wider implications of uncertainty.

The initial range of futures to be considered could be assessed under a qualitative framework first before choosing one or more numerical scenarios to feed into a multi-modal model for the TA. The 'vision-led' or policy compliant scenario should be the 'core scenario,' because when a 'worst case' scenario is modelled it often ends up driving decisions around site selection, infrastructure, and investment. PINS should be part of this change in process, to ensure any method brought forward will be understood and supported through the planning process, including Examination in Public.

What examples are out there now?

TRICS has Decide and Provide guidance, and this has been incorporated into Oxfordshire County Council's TA requirements. Both documents address the technicalities of a new way of thinking about trip generation for site-specific TAs.

Somerset Council has also developed Decide and Provide Guidance (and were recently awarded a Sustainability Award by CIHT for it).

National Highways has published guidance on how the Vision Led approach is applied in their development management role.

Several local authorities have undertaken Local Plan TAs with alternative methods of trip generation (or at least one alternative scenario alongside a traditional 'core'). These include The Wirral, Dartford, and East Hampshire. The Working Group is yet to review these.

Many consultants are also using alternative assessments in site-specific TAs, but there is no record of how and where this is being done and the methodologies are likely to vary significantly.

What is the measure of success – what will be acceptable?

Acceptable	Unacceptable / severe
• A vision-led assessment that builds up a picture of how trip generation will look if the vision is achieved.	• An assessment which only focuses on vehicle-based trips and vehicle impacts, at peak times.

• A multi-modal assessment.	• 'Worst case' scenarios.
• An assessment which considers the actual journeys people will make, by all modes, across a day.	• Very fixed/precise scenarios, reliant on specific numbers and model outputs.
• Evidence based, but not wholly driven by empirical data.	• An overreliance on empirical data.
• With scenario(s) for future change in travel behaviour.	
• The level of assessment of trip generation within a TA should be proportionate and relevant to the scale and type of development being proposed.	

How do you present this to the audience?

There can be issues with conveying the shift to a vision-led approach to trip generation in TAs to elected members, the public, and even developers. Decisions to invest in alternative, sustainable infrastructure (which are guided by TAs) need to be justified and capable of withstanding as much scrutiny as road schemes. It is, however, going to be important to acknowledge and accept uncertainty, in the same way that modelling is currently uncertain – we are just not particularly good at acknowledging it and learning from it.

It should be better communicated that the primary purpose of TAs (Local Plan and site-specific) is not to measure and alleviate congestion but instead to ensure that future site users have a genuine choice of transport modes for their day-to-day trips, without negatively impacting on the surrounding areas and neighbours (when considered against a range of metrics).

In terms of conveying the detail of expected trip generation profiles for specific sites, 'day in the life' stories and visualisations can be compelling and avoid the reduction of important proposals and schemes down to numbers and modelling. These also help the audience (and practitioners themselves) to consider the range of journeys that are being made to/from sites, rather than a narrow focus on peak hour commuting trips.

Does policy let us do this? If not, what needs to change?

Standard wording around all the above in policy and guidance would help members know that these assessments would be accepted by DfT/PINS (even though there is nothing in policy stopping us doing them).

Guidance on the capacities of walk/cycle/bus/rail networks would assist with understanding the impact of trip generation by mode and will help set a realistic vision. We mostly have guidance on road capacity and have developed instincts around what will/will not work, but less so with sustainable travel infrastructure. LTN 1/20 and TfL Pedestrian Comfort Levels provide some guidance.

If the TRICS Decide and Provide guidance (or similar) is to be adopted by all, policy needs to be clearer on when and how this should be used. It does not fully specify the approach to Local Plan TAs, so other guidance is still needed.

National Highways has also published guidance on how the Vision Led approach is applied in their development management role, but the Working Group is not aware of case studies of how this has been applied in practice. TAG may also need to adapt.

As above, more exemplary sites are needed (e.g. within TRICS), and more evidence, in an easy to access format for practitioners e.g. case studies.

Ultimately, Paragraph 115 (formerly 111) of the NPPF needs to change to rebalance the emphasis on impacts on the 'road network' - suggestions for wording are given in the Phase 1 report.

How does this meet the vision?

Three big asks:

Start earlier and work together better:
Defining a vision should start early. This should set the ball rolling with a more positive approach to considering the nature and purposes of all trips, with a more optimistic assumption that people will travel by a range of modes. Aligning early site selection and/or master planning to the holistic vision-led process will set the foundations for the trip generation exercise and result in higher estimates of active and sustainable trips and lower estimations of vehicle-based trips.

Update and integrate policy and guidance to deliver genuine transport choice:
Vehicle based trips and their impacts will still be measured, but with greater weight given to estimating walking, cycling and public transport trips and their impacts. This will highlight the challenges of accommodating those modes and should rebalance efforts and investments on building capacity into those networks.

Measure more things and measure them better:
Policy should provide clarity on how a more balanced approach to considering multi-modal trips for a range of journeys can be taken, suggesting the most appropriate tools or methodologies to use. The emphasis on the 'road network' in Paragraph 115 (formerly 111) should be removed because this influences how practitioners then frame their assessments and proposals. The assessment of the trip generation, and the impacts of this, should be proportionate to the scale and type of development.

Post planning considerations (travel planning)

Post planning matters for TAs tend to include traffic monitoring commitments, Travel Plans, and other management plans – including Delivery and Servicing Plans, Construction Logistics Plans, and Parking Design and Management Plans. The Working Group discussion largely focused on travel plans; this is reflected in the summary below.

For Local Plan TAs, there is no post planning assessment, as this would be associated with site-specific TAs. Post planning metrics may form part of policy within the wider Local Plan but would not come forward until individual sites were submitted for planning.

For site-specific TAs, two forms of post planning assessment are commonly used, the first is associated with triggers in levels of car trips associated with a site, linked to 's106 agreements' – for example, where a threshold is triggered, further mitigation measures may be required. The second is a Travel Plan which may be secured through a planning condition or obligations (normally through a s106 agreement).

The issue with the first assessment, is that it continues to perpetuate a 'predict and provide' mentality, where more car trips can be accommodated with further increases in highway capacity. There are some exceptions, particularly through 'decide and provide' TAs, where proposed mitigation is more likely to focus on active travel and public transport, but the Working Group was not aware of examples that have received planning consent (although we understand Oxfordshire County Council is very close to achieving this).

The Working Group identified issues with the way that Travel Plans are currently prepared and monitored. They are often seen as a tick box exercise by consultants, used to mitigate highways impact, rather than support a vision for sustainable transport use. The highway authorities that assess and monitor travel plans often have very limited resources to do a comprehensive job – this is an odd situation as many authorities have fully staffed Development Planning teams who can charge fees to cover this work. Generally, the Working Group agreed that Travel Plans are not often thought to make a significant positive impact, despite their potential.

Travel Plans are regularly required to monitor the trips associated with a site, often through TRICS SAM surveys, which provide the profession with regularly updated mode share splits for different types of development. This data can help to demonstrate how different locations and types of development might influence mode shares (noting that this might also be influenced by other factors that are less well recorded). These surveys are comprehensive, but often only capture one day. Sometimes, due to expense and complexity, these surveys will be replaced by basic automated traffic counts which only capture motor vehicle trips. Travel Plan monitoring information is not published by local authorities.

Where a development site is split into several applications, Travel Plans may be delivered by different consultants within the same locality, which may lead to different offers and incentives being offered to neighbours.

Travel planning is mostly undertaken by transport planners, and largely by development transport planners, who may not have the right skill set – behaviour change is very different to planning and engineering.

What type of assessment do we want to do?

Most of the data collected should be quantitative as this can more easily be used to measure impacts in a statistically significant way e.g. through TRICS SAM surveys. Large sample sizes are needed to support this.

Surveys should add qualitative detail to the numbers collected, e.g. local knowledge, awareness of the travel plan, suggestions for further measures.

What does it need to cover? How?

Old TA guidance set thresholds on the level of development that would require a Travel Plan, whereas current guidance is very vague, leaving highway authorities to set their own thresholds. Clearer guidance should be provided.

Consideration should be given to a different model of travel planning where the local authority could take a contribution and deliver the Travel Plan themselves (perhaps by behaviour change teams rather than development planners) – this may offer greater consistency across neighbouring sites and over long buildout timeframes, and wider oversight of measures that would benefit employees and residents e.g. bus or micromobility services, or travel incentives that could support several new developments.

Local authorities should consider requiring a standard monitoring report and format from Travel Plan coordinators, with a requirement for statistical analysis. This will support comparison of measures and assessment of effectiveness and value for money.

The Working Group questioned whether any aggregate monitoring of trips should be compared back to the Local Plan transport assessment i.e. did what was predicted to happen, happen? However, the group considered that the most useful monitoring relates to site specific TAs. This should be in the form of mandatory Travel Plans with robust mode share monitoring (TRICS SAM as the default), and preferably enhanced monitoring to consider journey purpose and trip length. Although this information is routinely captured through employer Travel Plans, it is much less dependable for resident surveys where response rates are very low, and not representative. App and GPS based technology could support this.

Highway authorities should be required to publish approved Travel Plans and monitoring for live and historic sites, so that this information is available for residents, local members,

and Travel Plan consultants. As fees can be collected for this work, it should still be achievable in the current financial situation facing local authorities.

Travel Plans should be focused on what is realistically achievable, tailored to the features and location of the site, and information shared by highway authorities will help everyone to see what works and what doesn't for different development types. DfT could consider requiring data returns of Travel Plans back to central government to create a "what works" database which could support a new respect for the role of the Travel Plan.

What examples are out there now?
Travel Plans have been a staple of development planning for decades and there are countless examples available. Generally, the Working Group considered employee Travel Plans to be of higher quality and effectiveness than residential Travel Plans. The Working Group has many good examples, and the group is not seeking 'the reinvention of the wheel', but for the centralising and modernising of the process, using best practice. The Working Group is closely following the first planning application and s106 agreement to be decided under the new *'decide and provide'* approach in Oxfordshire. In addition, the group shared that Brighton and Hove council has been using 'vivacity' cameras to produce some Travel Plan data – this would be another interesting insight. Google Maps already collects trip length, mode share and journey purpose for everyone using Google Maps on their mobile phone, but this data is not available to transport planners. Other good examples identified by the group included: • Modeshift online travel planning portal • TfL corridor travel plans • Stansted Airport where car park charges feed back into the Travel Plan pot • Cambridge University Eddington site • Met Office in Exeter • Garden Community travel plans, which use community champions • Those where long-term initiatives such as bike recycling organisations, or walking groups have resulted in modal shift over time

What is the measure of success – what will be acceptable?	
Acceptable	Unacceptable / severe
• Trip rates (mode split, and preferably also journey purpose and distance) should be captured.	• A Travel Plan that does not capture trip rates should not be acceptable. • Insufficient data collection

• Response rates to surveys should be statistically significant where possible/appropriate. • Sites within the same area, but with different developers should be encouraged to collaborate to provide services (or this should be undertaken by the local authority and funded by the developer). • The requirement for and scope of a Travel Plan and monitoring should be proportionate and relevant to the type and scale of development proposed.	• A Travel Plan without a funding agreement (where this is required).

The Working Group considered that the way forward for Travel Plans, particularly for data collection and communication, is digital. Residential Travel Plans could hook onto existing community Whatsapp groups, or local neighbourhood Facebook groups; employer Travel Plans could use company online systems e.g. MS Teams or intranets. If relevant, a travel planning app could be created, and gamification considered (e.g. Betterpoints). The Dutch government uses mobile phone tracking for an annual travel survey which gathers much richer data than is currently available to transport planners in the UK. For this to work, there must be reciprocity in sharing data, with residents and employees updated on the results, and rewarded for taking part.

The group considered that Travel Plan communication should be based on messaging that will work for the targeted communities. Tools like Experian Mosaic could be used to assist with this i.e. some groups will be more receptive to messages around money saving, whilst other groups might be more receptive to messages related to health, or climate change. More use of online videos could be used to help residents understand the travel options around them.

As above, the local highway authority should share Travel Plan information online, preferably using a map base so that people can find their local Travel Plan, and those of neighbouring areas.

Does policy let us do this? If not, what needs to change?

Planning Practice Guidance should be updated and strengthened so that:
- Travel Plans are fully integrated into the TA process and set a clear framework for evaluating the vision, objectives, and measures implemented to achieve them.

- TA outcomes are monitored and managed through a Travel Plan.
- TRICS SAM surveys are required as the default (above a threshold).
- Local authorities are required to publish Travel Plan results and report back to DfT so that practice can be analysed for best value.

How does this meet the vision?
Three big asks

Start earlier and work together better:
Travel Plans should be considered at the earliest stages of planning development, not as an afterthought. Where larger sites will have Travel Plans delivered by multiple companies, or a cluster of sites are close by, Travel Plan coordinators should be required to coordinate with each other, with facilitation from the local authority.

Update and integrate policy and guidance to deliver genuine transport choice:
See box above.

Measure more things and measure them better:
Here the focus is on measuring things better, with more robust data and a requirement for statistical analysis, data sharing, and a move towards measures that are proven to be effective, potentially with a wider remit for local authorities to deliver measures (that are funded by developers).

Next steps

Following the submission of this Phase 2 report, the Working Group will seek to meet with ministers to discuss the recommendations and how changes can be made.

The Working Group has now moved into Phase 3 of the project. Whilst it was originally intended that this would comprise checking back, and making final proposals, it is felt that this has been completed within Phase 2. The group has agreed that instead, Phase 3 will include sharing emerging and best practice within the profession.

Appendix 1

Terms of reference for Fixing Transport Assessments National Working Group

Fixing Transport Assessments Working Group
(FTA working group)

Terms of Reference
Agreed in Working Group meeting, April 2023

General
The Fixing Transport Assessments Working Group comprises planning and highway authorities, national planning and transport organisations, consultancies, and specialist subject experts. It is problem focussed working group, with no charge for membership.

Scope of the group
The group exists as a result of recognition across its professions that existing transport assessment practices are failing to produce outcomes that support/meet wider goals, such as national and local climate emergencies/carbon targets, Local Transport Plans, and other social benefits such as health, air quality etc.

Although current guidance in National Planning Policy Guidance (2021) and TA guidance (2014) does not prescribe a methodology, the lack of guidance on methodology and long-held practices of those completing Transport Assessments have embedded a methodology that is not supportive of these wider goals. This group aims to collectively create new guidance, or recommendations for guidance, and associated methodology for undertaking improved transport assessments; both strategic (including Local Plans) and site-specific.

Aim
The aim of the group is to ensure good placemaking principles are inherent in transport assessment guidance and methodology and to improve the outcomes of transport assessments in relation to:

- Carbon reduction
- Air pollution
- Climate change resilience
- Equality/equity
- Health
- Levelling up
- Quality of life

Objectives
The objectives of the group are to:

- Advise on/co-create new transport assessment processes that are affordable, practical and accessible, and supported by guidance to ensure it is defensible, with an example for others to follow
- Maximise DfT, DLUHC and PINS support for any new approach, and influence the development of future version of NPPF and Planning Practice Guidance (PPG) as relevant.
- Test the new approach through the Local Plan Examination in Public process to prove acceptability of the approach

Outputs

The outputs of the group are intended to be:

- Proposed new guidance for Local Plan and site-specific transport assessments – the output will make a distinction between the two
- Proposed methodology to support development of these TAs
- A report of key findings
- An equalities impact assessment which assesses how the proposed approach impacts on people with different protected characteristics.

These outputs will consider the following:

- Working within the current planning system
- Working with the tabled changes to the planning system
- Higher and lower resource heavy options for different sizes of local authority

Membership

The group will have a **core membership** of planning and highway authorities, national planning and transport organisations, consultancies and specialists. Planning and highway authorities will lead the discussion and should have higher numbers in the working group that those working for consultancies.

The proposed core membership is contained in the document: 'Fixing TAs national working group membership' and has been circulated with the draft terms of reference. It is proposed that the membership is kept under review and added to as required.

Core group members representing national organisations e.g. CIHT, RTPI, TPS are asked to gain official support from the relevant bodies in order to raise awareness and add weight to the work of the group.

There will also be a **wider membership** of interest parties, who can sign up for updates, and be involved in polls, calls for evidence/information etc. It is proposed that this is managed via a LinkedIn group, and through group members engaging with their national conferences.

As required, **subject experts** will be called upon to support specific areas of work, for example, transport equity, or the links between transport and health.

Government bodies such as The Department for Transport and Department for Levelling Up Housing and Communities, PINs and Active Travel England will be observing members and may attend meetings on invitation.

Project operation – link with HCC commissioned development management guidance update

As discussed at the first two meetings of this group, Hampshire County Council (HCC) has been awarded funding by Transport for the South East (TfSE) to produce development management guidance that can be easily adopted by all local authorities in the TfSE area. The scope contains work packages very similar to the work of this group. This work will be led by HCC, with consultancy support. HCC has now commissioned the lead consultant, from WSP, who will procure consultants from HCC's PCI framework, choosing the best suited individuals from WSP, Stantec and Jacobs for each work package.

To ensure the work that HCC develops is applicable to all authorities, HCC would like to link its project to this working group in order to help define each work package before it is commissioned. This approach provides mutual benefits – the HCC project gains from a wider understanding of issues and applicability of approaches, and the working group benefits from consultant time to investigate and propose approaches to many of the issues raised.

The working group would review outputs of each package to provide. The working group can consider whether or not each package addresses the aims and objectives of its own scope, and how much of the work it might want to incorporate into its own outputs.

Attached is a proposed programme for HCC's project, showing how it could interact with the working group.

Administration

Chair

The chair of the group will be Nicola Waight, Hampshire County Council. Should Nicola be unable to chair e.g. due to ill health, the meeting will be chaired by vice-chair, Nicola Lodge. In a situation where the chair can no longer continue their role, the group will propose a new chair. If necessary, a simple vote of core group members can be carried out to ratify the new chair. The chair fulfils the duties of chair, supporting the functions and purposes of the group.

Project support

Project support will be provided by Hampshire County Council. Project support covers administrative functions such as arranging meetings, sending agendas, papers and minutes, as well as maintaining a MS SharePoint site and group (chat) which will be available to all core group members.

A LinkedIn group will also be managed by HCC to enable collaboration with wider group members and professions.

Meetings

Meetings of the group will mainly take place online, via MS Teams, and, to support open and honest conversations, will not be recorded.

Meetings will be monthly, for around 1.5 hours. The frequency of meetings may change in light of project requirements. A future programme of meetings will be set for the financial year 2023/24. It is anticipated that the work of this group will be completed within one year.

Meeting papers and an agenda will be circulated to the core group around two weeks before each meeting. Most meetings will take the form of workshops centred around themes in the proposed programme. The workshops will be facilitated by Hampshire County Council.

The overall work of the group members will include;

- reading of papers in advance of meetings;
- active participation in workshops;
- reviewing of outputs from the HCC commissioned work; and
- on occasion, supporting specific inputs outside of meetings.

Meeting notes will be taken and circulated within five working days of each meeting.

Appendix 2

Membership of Fixing Transport Assessments National Working Group

Organisation	From	Name	Meeting Initials	Email	Role
Hampshire County Council	Local Government	Nicola Waight	NW	Nicola.Waight@hants.gov.uk	Current Chair
Hampshire County Council	Local Government	Simon St John	SSJ	Simon.StJohn@hants.gov.uk	Project Support
Hampshire County Council	Local Government	Jo Hamment	JH	Jo.Hamment@hants.gov.uk	
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