

Project Pack v1.1

Category 2



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To find out more, please contact: Places for Everyone
placesforeveryone@sustrans.org.uk

Sustrans is the charity making it easier for people to walk and cycle.

We connect people and places, create liveable neighbourhoods, transform the school run and deliver a happier, healthier commute.

Join us on our journey.

www.sustrans.org.uk

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Version Control

Version – Date	Originator	Reviewer	Changes
V1.0 28/08/2019	S. Strain	T. Lovell D. Keen	1. Initial Version
V1.1 03/12/2019	S Skinner		2. Updated links to Application Guidance (p3) and Sustrans' Design Guidance (p27) 3. Refreshed external links 4. Added indication where links open PDF downloads 5. Added Version Control table with resultant changes to page numbers

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Introduction

Congratulations, your Places for Everyone application has been successful.

What's next?

This document sets out partner responsibilities going forward, as well as Sustrans' offer of support.

This document also reiterates the project requirements across each Stage. These were outlined in the [Places for Everyone Application Guidance](#), and outline all project deliverables going forward. While our preference is for all projects to enter the programme at an early stage of development (Stage 0 or 1), your project may be at a more developed stage, or about to enter the construction stage.

Places for Everyone aims to create safer, more attractive, healthier places, as well as happier lives, by enabling and encouraging people to change the way they travel. We're looking forward to working with you to help rebalance Scotland's streets in favour of more walking, cycling and wheeling for everyday journeys.

Category 2 projects

There are four Categories of projects in Places for Everyone, ranging from Category 1 to Category 4.

Your project has been classified by Sustrans as belonging to Category 2.

These are considered to be high impact projects requiring some support and oversight from Sustrans as project delivery partners.

This document explains the Category 2 structure and the support offered in more detail.

Project Requirements

The aim of Places for Everyone is to create safer, more attractive, healthier places by increasing the number of everyday journeys made by walking, cycling and wheeling.

Design Principles

In order to ensure all projects receiving funding make the largest possible impact, Sustrans has developed the following design principles:

- 1 Develop ideas collaboratively and in partnership with communities.
- 2 Facilitate independent walking, cycling and wheeling for everyone, including an unaccompanied 12 year old.
- 3 Design places that provide enjoyment, comfort and protection.
- 4 Ensure access for all and equality of opportunity in public space.
- 5 Ensure all proposals are developed in a way that is context-specific and evidence-led.
- 6 Reallocate road space, and restrict motor traffic permeability to prioritise people walking, cycling and wheeling over private motor vehicles.*

All Places for Everyone projects must meet these design principles. More information has been provided on the following pages to clarify what some of these design principles might mean in terms of practical delivery.

* In exceptional circumstances, Places for Everyone may consider projects where it is not technically feasible to achieve this specific criterion if all others are met and the impact of the proposal is deemed significant by Sustrans.

Design Principles explained

Strategic Vision

- Projects will consider an area's wider environment, improving shorter multi-stop journeys as well as A – B commuter routes. Supporting urban design strategies are encouraged.
- All projects should review and seek to assess inequalities that exist in an area. Projects will provide improved infrastructure and provision for communities ranked in the bottom 15% by the Scottish Index of Multiple Deprivation (SIMD) where possible.
- The public realm should be safe for users of all ages and abilities. We expect routes to take advantage of the improved public safety that comes from being well-overlooked or in well-used locations, benefiting from proximity of others. Lighting improvements and improvement of sightlines should be considered.

Footways

- Sustrans Scotland recommends as a default position that people on foot and those on bike do not share footways (pavements beside a carriageway) in urban settings. This does not apply to parks, rural paths or settings other than urban footways.
- Crossing improvements must respond to pedestrian desire lines and include dropped kerbs and tactile paving.
- The use of guardrail and staggered crossings should be avoided in all but exceptional circumstances in order to reduce street clutter and respond to pedestrian desire lines.
- Footways should be 2m wide at a minimum, wherever possible.
- It is recommended that footways are surfaced in a colour or material that contrasts with the carriageway material. This enhances a sense of pedestrian priority over vehicles.
- Continuous footways and cycleways across side roads and accesses should be prioritised, clearly defined and unambiguous for all users. Continuous footways should be a continuation of the material of the footway.

Cycleways & Carriageways

- Where segregated cycling facilities are provided, a minimum of 60mm upstand should be provided wherever possible between footways and cycleways and between cycleways and carriageways.
- Where cycling is proposed on carriageways (ie. not segregated), traffic speeds are expected to be 20mph or less and vehicle numbers are expected to be reduced to

<2000 vehicles per day. On these streets, projects are likely to require other 'quietway'-style interventions and/or traffic restrictions in order to meet the standards expected.

- Dependent on local setting and context, best practice widths for urban cycleways are 2.5m for one way and 4m for bi-directional routes
- Where an off road shared use path is an appropriate solution, the width provided should be appropriate to the usage and context. It will need to be considerably wider than minimum standards if it is likely to be well-used.
- Cycleway provision is required to be easily legible. This means that the design of the provision should aim to be consistent between different sections of a route.
- Cycleway materials are expected to be clearly visible, contrasting to the footway, and durable, especially at junctions. On asphalt roads, red coloured asphalt for cycleways is considered best practice and is encouraged.
- On primary arteries next to cycleways in towns and cities (used by buses and HGVs) two way carriageway widths are expected to be a maximum of 6m on straight sections of road and 6.5m on corners. On other routes, widths are expected to be considerably narrower.

Public realm

- Public realm improvements must be integrated into the project. These could include material upgrades, street furniture, de-cluttering or green infrastructure.
- Projects must never negatively impact on biodiversity. A biodiversity net gain is encouraged.

Communities

- Community engagement should follow the principles outlined in Sustrans' Community Engagement Guidance (linked at the end of this document).
- Community engagement should inform the design of the infrastructure as well as associated bespoke behaviour change activities.

Sustrans are always working to improve the quality of the projects being delivered through Places for Everyone. Standards may be added to or amended between award rounds based on the latest evidence of designing infrastructure for people walking, cycling and wheeling.

Project Stages

Places for Everyone has been designed and structured around a series of easy to understand Project Stages. All projects, regardless of size, scale or scope, must demonstrate satisfactory completion of all project stages. The satisfactory completion of project stages will be reviewed by Sustrans at pre-determined gateways during project delivery. The ongoing approval process is detailed in the '[Partner Responsibilities](#)' chapter.

The following tables contain a detailed description of the expected activities and deliverables for each project stage.

Task 1: Design and Construction

<p>0 →</p> <p>Strategic definition</p> <p>Set out the project vision and justify strategic need.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Aims and objectives of the project • Viable business case • Strategies identifying the project • Letter of political support 	<p>→</p> <p>1 →</p> <p>Preparation and Brief</p> <p>Define the scope of the project and develop project outcomes.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Feasibility study • Overall map of the proposals/location plan • Options appraisals • Budget and programme forecast • Equality/Impact Assessment (Eq/IA) • Designer's Risk Register <p>Where appropriate:</p> <ul style="list-style-type: none"> • Public Life survey • Identification of green infrastructure opportunities <p>Construction Design and Management (CDM):</p> <ul style="list-style-type: none"> • Partners undertake the role of Client and appoint Principal Designer. Sustrans appointed as Designer to support and influence design development. 	<p>→</p> <p>2 →</p> <p>Concept Design</p> <p>Define interventions including outline proposals and preliminary cost information.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • General Arrangement drawings (min. 1:500 scale) • More detailed options appraisals • Topographical survey • Updated Eq/IA • Road Safety Audit (RSA) Stage 1 • Updated Designer's Risk Register <p>Where appropriate:</p> <ul style="list-style-type: none"> • Visualisations • Multi-modal transport modelling • Plan for a street trial • Overarching urban design strategy • Development of green infrastructure proposals 	<p>→</p> <p>3 →</p> <p>Developed Design</p> <p>Include coordinated and updated proposals.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Updated General Arrangement drawings (min. 1:500 scale) • Construction details (as requested) • Utilities surveys • Drainage proposals • Signage and line markings • Updated Eq/IA • Revised budget and programme • FSA Stage 2 (including Client and Designer response) • Updated Designer's Risk Register <p>Where appropriate:</p> <ul style="list-style-type: none"> • Signalling proposals • Vehicle tracking drawings • Lighting proposals 	<p>→</p> <p>4 →</p> <p>Technical Design</p> <p>Technical Design prepared to include all required information for construction.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Tender drawings, including site clearance drawings • Specification • Contractor procurement • Bill of Quantities • Updated Designer's Risk Register 	<p>→</p> <p>5 →</p> <p>Construction</p> <p>Construction commences according to programme.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Revised budget and construction programme • Regular site visits • Progress reports <p>CDM:</p> <ul style="list-style-type: none"> • A competent Principal Contractor is appointed • Ensure Principal Designer and Principal Contractor carry out their duties 	<p>→</p> <p>6 →</p> <p>Handover & Close Out</p> <p>Construction is complete and the end of works can be formalised.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • Snagging list • "As built" drawings • RSA Stage 3 to be commissioned • Project End Report <p>Where appropriate:</p> <ul style="list-style-type: none"> • Any green infrastructure maintained more closely at first to ensure it is fully established 	<p>→</p> <p>7</p> <p>In Use</p> <p>The project is now being used by the community and is to be maintained for 15 years after project construction.</p> <p>Deliverables:</p> <ul style="list-style-type: none"> • FSA Stage 4 to be commissioned • Lessons learnt log, completed in collaboration with Sustrans. Informed by assessing the design in use • Ongoing green infrastructure maintenance in line with best practice habitat management
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Task 2: Community Engagement

0 → Strategic definition	1 → Preparation and Brief	2 Concept Design	3 → Developed Design	4 → Technical Design	5 Construction	6 → Handover & Close Out	7 In Use
<p>Understand key aspirations of local communities and wider social and political aspirations for the area.</p> <p>— Deliverables:</p> <ul style="list-style-type: none"> • Stakeholder map • Community engagement strategy • Evidence of relationships with local community groups, and other supporters • Identify budget and appropriate delivery partners 	<p>Deliver the community engagement plan to reach identified stakeholders.</p> <p>— Deliverables:</p> <ul style="list-style-type: none"> • Events, workshops, meetings, online platforms • Community engagement reports • Progress reports for the community, highlighting their influence • Targeted engagement with seldom heard groups and those with protected characteristics in order to develop an EqIA <p>Where appropriate:</p> <ul style="list-style-type: none"> • Big Street Survey in local schools 	<p>Test ideas with the community through street trials.</p> <p>— Deliverables:</p> <ul style="list-style-type: none"> • Progress reports • Trial activities and events • Updated EqIA <p>Ongoing consultation on design with a wide representation of groups, through various events, workshops, meetings, online platforms.</p>		<p>Provide regular project updates to the community. Ongoing consultation on design details, including ongoing dialogue with groups representing people with protected characteristics.</p> <p>— Deliverables:</p> <ul style="list-style-type: none"> • Updated EqIA 			<p>Community given option of ownership of some aspects of the project.</p> <p>— Deliverables:</p> <ul style="list-style-type: none"> • Agreement with community to maintain elements of the project where applicable.

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Task 3: Behaviour Change

0 →	1 →	2	3	4	→	5	6	7
Strategic definition	Preparation and Brief	Concept Design	Developed Design	Technical Design	→	Construction	Handover & Close Out	In Use
Identifying target groups for behaviour change.	Use findings from community engagement to identify barriers to active travel.	Implement, review and improve activities.			→	Ongoing implementation and revision if necessary.		
Deliverables: <ul style="list-style-type: none"> • Include key groups in community engagement strategy • Identification of social barriers to walking and cycling through community engagement 	Deliverables: <ul style="list-style-type: none"> • Work with local community to identify and prioritise meaningful activities to address barriers. • Behaviour change plan (where applicable) • Identify budget, appropriate delivery partners 				→			

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Task 4: Permissions and Obligations

0	→	1	→	2	3	4	5	→	6	→	7
Strategic definition		Preparation and Brief		Concept Design	Developed Design	Technical Design	Construction		Handover & Close Out		In Use
Land ownership.		Committee approval, Preliminary Ecological Appraisal (PEA).		Statutory permissions, Traffic Regulation Orders.	Further ecological surveys (based on the PEA) should be carried out and should inform detailed design development. Species licensing (if required). Implementation of mitigation/compensation (if required).						
← -- Evidence of permissions obtained / reports to be submitted to Sustrans -- -->											

Task 5: Communications

0	1	→	2	3	4	→	5	→	6	→	7
Strategic definition	Preparation and Brief		Concept Design	Developed Design	Technical Design		Construction		Handover & Close Out		In Use
Decide how the project will be communicated and identify key audiences and key messages.			Deliver the communication plan to actively promote the project and keep people informed.				Construction updates.		Opening event with community.		Publish monitoring results to communicate impact of the project.
<p>Deliverables:</p> <ul style="list-style-type: none"> Develop Communications plan Press releases Social media content 											

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Task 6: Monitoring & Evaluation

0	→	1	→	2	3	4	→	5	→	6	→	7
Strategic definition		Preparation and Brief		Concept Design	Developed Design	Technical Design		Construction		Handover & Close Out		In Use
Consolidation of pre-existing evidence and policies, including Hands Up Scotland Survey data.		Design a monitoring and evaluation plan that demonstrates how the projects outcomes will be measured. Deliverables: • Monitoring and evaluation plan		Complete baseline monitoring to capture pre-intervention context i.e. use of space and stakeholders views. Monitoring of activities delivered. Deliverables: • Baseline monitoring • Monitor success of street trials				Installation of monitoring equipment if not already in place. Deliverables: • Automatic counters		Complete follow-up monitoring to capture changes resulting from the project including a comparison to baseline monitoring. Deliverables: • Follow-up monitoring • Project outcomes evaluation		In use monitoring to be completed in line with plan. Lessons learnt from monitoring process shared in order to improve future projects and designs.

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Project phases

Not to be confused with Project Stages, **project phases** are considered to be discrete geographical areas of a project. Usually projects of a large scale are required to be broken into a series of smaller areas of work for ease of delivery. It is not an essential requirement to break your project into phases, nor are there a maximum number of phases allowed, but these may be referred to in the project management information or in the change control process (outlined further in the next chapter).

All projects are required to complete Stages 0-2 (up to the end of concept design) for the whole project area. After *Stage 2: Concept Design*, larger projects can to break down into smaller geographic phases for subsequent stages, if they wish.

Partner Responsibilities

Category 2 projects must be developed in partnership with Sustrans ensuring all project information is made available to Sustrans.

Partnership working

Sustrans will work in partnership with you to develop the project. As project partners, both parties have the responsibility to ensure open lines of communication and information sharing throughout the project as well as a willingness to adapt to the other's constraints and expectations.

Project governance

All partners will be sent legal agreements for each awarded project and will be expected to sign and return within 28 days of receiving the agreement.

Within reason, and to mutual agreement, the frequency and format of meetings can be adjusted, but political representation and a decision-making framework are essential. Teleconference and Skype meetings can be arranged if required. As a bare minimum the following is required:

- + Project inception meeting (to include Sustrans, Local Authority, and representation from all primary project partner(s)). Bodies eligible as a primary project partner(s) may include a constituted community group, a housing association, or a development trust.

- + Quarterly Delivery Group meetings to discuss design development and project management.
- + Gateway Approval through the claim process upon completion of Stage 2: Concept Design, 4: Technical Design and Stage 7: In Use

Alongside the legal agreement, Sustrans also requires all partners to provide up to date project management information. A template for this is included at the end of this document. This should be shared with Sustrans at the following times:

- + the outset of each Stage, or set of Stages,
- + Whenever it is updated

This information should include:

- + Spend profile
- + Delivery Plan
- + Agreed grant claim dates
- + Issues and lessons learnt log
- + Risk register

Finance

Accurate financial forecasting is essential for all projects (and Stages within projects). As part of the Project Management information, Sustrans must be updated whenever forecasts change. Accuracy of forecasting will be refined as the project progresses, with greater optimism bias applied at earlier stages, reducing as the project passes through the Project Stages. Accurate forecasting allows Sustrans to assess budget availability and assess whether design costs proposed are reasonable.

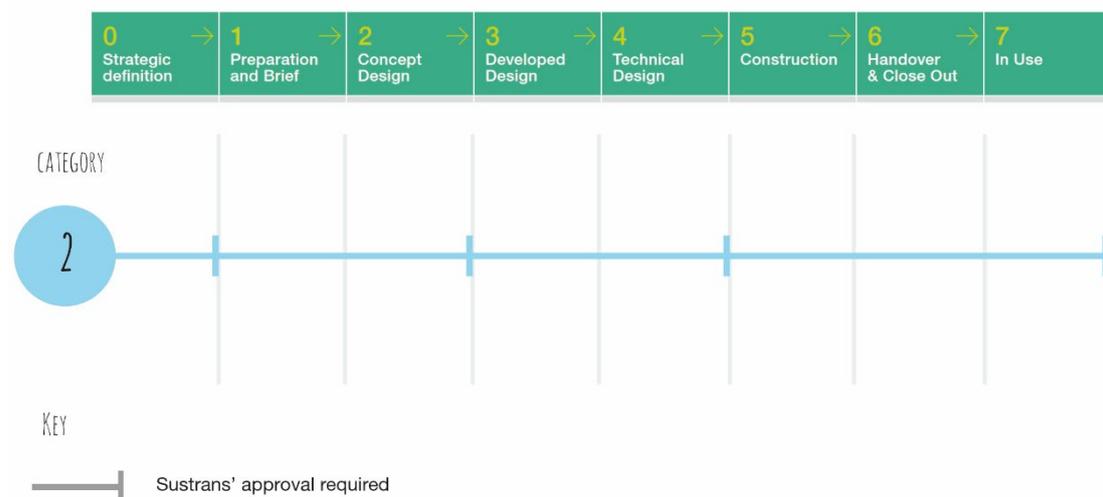
Should the forecast cost of your project(s) increase or decrease, please follow the change control process outlined below.

Sustrans can provide 100% of design/pre construction costs, up to 10% of the global project cost. In all cases where design has been costed at over 10% of the global cost, we can offer 50% funding for the additional design costs.

In the vast majority of cases, match funding for work beyond *Stage 5: Construction* must be secured before *Stage 3: Developed Design* funding is released. With prior agreement from Sustrans, we can provide community partners funding up to *Stage 4: Technical Design* without match funding being fully secured.

Further details on match funding requirements, including the terms and conditions of the 70% funding awarded to junctions, can be found in the match funding guidance, in the '[Templates and further guidance](#)' chapter.

Ongoing approval processes



As illustrated in the above diagram, Sustrans will formally review the project at the end of Stage 0: Strategic Definition, Stage 2: Concept Design, Stage 4: Technical Design and Stage 7: In Use. Sustrans and the partner will agree expectations and objectives at the outset of each Stage or set of Stages. These review gateways will consider all the different tasks of a project, including:

- + Design
- + Community Engagement
- + Behaviour Change
- + Permissions and Obligations
- + Communications
- + Monitoring & Evaluation

Grant claims should align with the completion of a Stage or set of Stages. These claims should happen throughout the year, at key milestones agreed at the inception meeting. Stage reviews will be signed off as part of the grant claim process. In addition, interim claims are encouraged throughout the construction Stage and should be discussed with the Infrastructure team.

The following are the outcomes you can expect from Stage reviews:

- + **Approved** - If any comments are reasonably considered and responded to, Stage reviews should be straightforward and be easily approved. Approved Stages will be eligible to claim funds in arrears and progress to the subsequent Stages. Working collaboratively with Sustrans throughout the process, should help to avoid any delays in funding approvals caused by a pending Stage review. If the project is delayed or postponed, Sustrans approval will remain in place for a period of 6 months. After this, Sustrans will need to carry out another stage review.
- + **Pending** - Pending projects will be required to review and resubmit information before funding can be released, and the project can then progress to subsequent Stages. Programme delays may be incurred, and funds cannot be claimed until the issues raised are satisfactorily resolved and must be responded to within 6 months. Pending information will be either:
 - You have not submitted all the required deliverables for that Stage or set of Stages; or
 - Deliverables submitted do not meet the standard expected by Sustrans.
- + **Rejected** - This occurs if:
 - The project has not satisfactorily addressed concerns in a previous 'pending' request, and has not made reasonable adjustments to resolve any outstanding issues within 6 months.
 - The Stage has substantially diverged in scope, budget or programme, without undergoing an approved Change Control process, as detailed below.

After a successful Stage review, Sustrans will arrange a follow up meeting to discuss the next steps. For pending awards, please refer to any resubmission requests on your grant claim sent via the online application portal. At each Stage, the Category of your project will re-assessed and re-classified where necessary (ie. if the project has increased in scope).

Change control process

At the outset of each project or geographic phase of a project we will agree:

- + Objectives for the project or geographic phase of a project. Objectives will set out the scope and will be SMART (Specific, Measurable, Achievable, Relevant, Time-based).
- + programme and grant claim dates
- + budget for each Stage within the project or geographic phase

In between Stage reviews, if there are any material changes to any of the above, the partner is required to submit a Change Control Form.

Prior to the formal process of submitting a Change Control Form, discussions should take place with the Infrastructure team quarterly delivery group meetings to initially assess the suitability of the change and its implications.

If all changes can be discussed as early as possible, it will help to ensure the Stage review is seamless and the full grant can be awarded promptly.

Depending on the significance of the change, Transport Scotland may also need to approve the change. Change Control Forms templates are included in the links at the end of this document.

Uncontrolled change may risk a Stage Review being marked as 'Pending', or being rejected altogether. Pending Stage Reviews could result in delays to the project or delays in grant claims.

Sustrans support

Partners will lead on developing a project that meets Sustrans Design Principles with advice from Sustrans.

The Sustrans team are much more than just funders, we're experts - trained to help you develop and deliver the best projects possible as you progress through the different Stages

Our role

Sustrans will provide some support to partners to develop the project. Category 2 projects will receive advice rather than hands on support to develop and deliver the project. Below is a description of how Sustrans will support Category 2 projects.

For Category 2 projects, Sustrans will provide advice on:

- + Design and construction
- + Community engagement
- + Behaviour change
- + Communications
- + Monitoring and evaluation

In the legal agreement, Sustrans is outlined as Project Monitor and part of our role is to monitor projects to ensure that projects comply with the conditions of the legal agreement. However, Sustrans will also influence designs and should be appointed a Designer, supporting the Principal Designer, in CDM terms.

The specifics of what support is available in relation to each of the task areas is detailed below.

Project tasks

Design and construction

Sustrans will provide design advice at two points through the project by setting out key considerations at the start of Stage 2: Concept Design and Stage 4: Technical Design. These key considerations should be incorporated into the project to ensure designs meet Sustrans Design Principles. All significant comments on the design will be recorded in a Design Development Form which will be kept on the online Portal and will be visible to the project partner and Sustrans.

For Category 2, projects Sustrans will:

- + Provide advice throughout the design process
- + Review designs at the end of Stage 2: Concept Design and Stage 4: Technical Design
- + As necessary, undergo change control process to review any changes to design if they are deemed required on site during construction.
- + Attend a project completion site visit once construction is complete

Community engagement

As part of all Places for Everyone projects, partners must develop ideas collaboratively and in partnership with communities by conducting community engagement activities. Special attention must be given to target groups that experience inequalities as well as local residents, groups and other stakeholders.

The community engagement plan produced by partners must be project specific and suitable to the scale of the project. National level data can be useful for understanding target populations and designing engagement initiatives.

For Category 2 projects Sustrans will:

- + Provide advice on best practice approaches and help shape the community engagement plan.
- + Review the completed community engagement activities at the completion of Stage 2: Concept Design and Stage 4: Technical Design

- + Maintain and update an online library of templates and resources on community engagement.

Behaviour change

As part of community engagement, partners are expected to gather:

- + information on physical infrastructure barriers to walking and cycling in the project area: and
- + information on social barriers and other factors that would support local people to walk, cycle and wheel for more everyday journeys.

Plans to overcome barriers and enhance supporting factors should be developed into a behaviour change plan specific to the project. Interventions to overcome these barriers should be designed and implemented by partners through allocation of budget and staff time. Sustrans recommends that behaviour change budgets should be in the range of 5% - 20% of infrastructure budgets to deliver interventions with community organisations and groups, neighbourhoods, schools, workplaces and youth groups, delivering appropriate workshops, activities and/or community grant schemes. This is an ambitious target and is not a requirement but all plans and associated budgets will be assessed by Sustrans and should be context appropriate and evidence led.

Plans can be solely delivered by the project partner or can be delivered in collaboration with other local community based organisations, access groups or key stakeholders e.g. schools or workplaces. Interventions must be able to demonstrate that they overcome barriers to walking, cycling and wheeling as identified by those who are intended to be the users of the new infrastructure. Interventions will be designed to target (or include) people who experience inequalities or who may be less inclined to walk, cycle or wheel, for other reasons besides infrastructure.

For Category 2 projects Sustrans will:

- + Provide advice on developing appropriate interventions and developing a behavior change plan
- + Review behaviour change plan and any completed interventions upon completion of Stage 2: Concept Design and Stage 4: Technical Design.
- + Maintain and update an online library of templates and resources on behaviour change.

Schools

All projects that will impact on the school run should engage and involve school stakeholders (especially children and young people) appropriately and effectively.

Here are some key steps that can be taken to encourage schools to engage with a project:

- + Complete a school travel plan (See Sustrans' [School Travel Planning Toolkit](#))
- + Participate in the [Hands Up Scotland Survey](#)
- + Ensure adequate cycle and scooter parking is available (see Sustrans' [School Cycle and Scooter Parking Grant Fund](#))
- + Participate in the [Big Pedal](#) and [Bike to School Week](#)
- + Share the Big Street Survey with teachers
- + Consider participating in [I Bike](#) who work intensively with specific schools and can help engage a whole school community in the project by:
 - gaining input from pupils, teachers and parents on local barriers to active travel
 - raising awareness of new infrastructure projects at various stages of design and construction
 - recruiting local volunteers to get involved with the project
 - offering training, resources and equipment towards schools with low bike ownership and low levels of cycling and scooting

For more information on I Bike please contact us on ibike@sustrans.org.uk

School engagement planning and delivery support may be offered to projects where such support has the potential to make the most significant impact. Sustrans will contact you if additional support is available for your project.

Workplaces

All projects in close proximity to workplaces should engage and involve workplace stakeholders appropriately and effectively.

Sustrans are able to support with advice on ways to engage workplaces. This could include completing a workplace travel plan (see [Travel Know How](#)), or participating in Sustrans' Workplace Engagement programme. Workplaces could be encouraged to use Sustrans' [Way to Work](#) website, or encouraged to participate in the [Scottish Workplace Journey Challenge](#).

Communications

Good communications engage and inform the local community and will generate interest in your project. By communicating early and often, you control the perception of your project, build positive relationships with journalists, social media users and people in the project area, and benefit from an increased audience for community engagement.

Projects are expected to develop a communications strategy appropriate to the size of the project, taking account of the project's geographical reach, nearby trip generators and the local community. This should be discussed with your organisation's Communications Team.

For Category 2 projects, this may include creating a project page on your existing website to let local residents know about progress on the project, publicising engagement events, issuing press releases and holding an event to celebrate the completion of the project.

For Category 2 projects Sustrans will:

- + Provide written guidance and logo images to be used in all publications produced as part of the Places for Everyone project.
- + Review and approve any press releases prior to publication.
- + Promote the project through social media.
- + Maintain and update an online library of template and resources on communications, marketing and media.

Requirements

As part of the Funding Agreement and our agreement with Transport Scotland, Sustrans Scotland and Transport Scotland should be acknowledged in all communications materials.

For leaflets, posters, videos, web content and other visual materials the Transport Scotland and Sustrans – Places for Everyone logos should be included. In exceptional circumstances, a dedicated project logo may be used in place of all partner logos. This should be agreed in advance with Sustrans Scotland and Transport Scotland.

For written materials such as press releases, acknowledgement should be included in the text with an opportunity for Sustrans to provide a positive quote if appropriate.

It is expected that visualisations and photographs created for your project will be made available for use of Sustrans in promoting and reporting on your project and for promotion of Places for Everyone, in print, digital and social media with appropriate credit.

Monitoring and evaluation

Monitoring and evaluation is a key part of project delivery to both evidence the impact of the project and aid in the development of future projects. When planning monitoring and evaluation activities partners should explore using existing local datasets (such as Hands Up Scotland Survey data for example) as well as consider what additional data can be collected to demonstrate the impact of the project.

For Category 2 projects Sustrans will:

- + Agree project outcomes and discuss potential indicators during the inception stage of the project.
- + Provide advice on developing a monitoring and evaluation plan
- + Review monitoring and evaluation plan and progress upon partner completion of Stage 2: Concept Design and Stage 4: Technical Design.
- + Maintain and update an online library of template and resources on monitoring and evaluation.

Events and Knowledge Sharing

As well as support from Sustrans, the Places for Everyone team facilitates additional support from external experts, as well as opportunities for partners to learn from each other's extensive experience.

Types of events offered

As well as project support from Sustrans Infrastructure team, Category 2 partners are also welcome to access selected events from the Places for Everyone events programme. These include:

- A series of events and webinars covering topics such as best practice in community engagement and Place Standard
- Networking opportunities with others delivering similar projects across Scotland and further afield.
- 'Raising the Standards Day' – an annual event to celebrate best practice and learn from other partners

Sustrans can provide financial assistance with travel where required, and all events will be hosted online wherever possible.

A calendar of events will be developed and organised around convenient times and venues for all partners.

Templates and further guidance

Each Stage of Places for Everyone requires submission of particular deliverables. This section provides templates to support this, as well as additional guidance on requirements.

Downloadable documents

For documents produced by Sustrans, the links below will always take you to the latest version of the document that is available; please check that you are referring to the latest one.

Legal

- + [Single-Year Legal Agreement](#)
- + [Multi-Year Legal Agreement](#)
- + [Equality Impact Assessment Guidance](#)
- + [Equality Impact Assessment template](#)
- + [Change Control form](#) (when the agreed scope or the budget of the project is to change)

Project Management

Please note, these templates are for guidance only. They are not essential if your organisation can share alternative systems with Sustrans that contain the same information.

- + [Design Development Form](#)

- + [Cat2 Project management template](#) (multiple tabs in spreadsheet) -
 - Spend profile template
 - Lessons learned log template
 - Risk register template

Stage approval processes

- + [Grant claim guidance](#)

Detailed terms and conditions

- + [Match Funding Guidance](#)

Further guidance and support

- + [Community Engagement Guidance](#)
- + [Monitoring and Evaluation Guidance](#)
- + [Options Appraisal Minimum Requirements](#) (Feasibility Study)
- + [Portal Guidance](#)
- + [Tin 48 Cycle Counters Guidance](#)

Document templates

- + [Communications Plan Template](#)
- + [Community Engagement Plan Template](#)
- + [Consultant Brief Template](#)
- + [Stakeholder Mapping Template](#)
- + [End Of Year Report Template-Design](#)
- + [End Of Year Report Template- Construction](#)

Permissions and obligations

- + [Preliminary ecological appraisals FAQ's](#)

Other links and useful resources

External links that maybe useful in the development of projects and ideas

Design

London Cycling Design Standards

- Advice for cycle network planning and for the design of dedicated cycle infrastructure, cycle-friendly streets and cycle parking. <https://tfl.gov.uk/corporate/publications-and-reports/streets-toolkit#on-this-page-2>

CROW Design manual for bicycle traffic

- Guidance on creating bicycle-friendly infrastructure and its position in the traffic system.

Wheels for Wellbeing – A guide to inclusive cycling

- <https://wheelsforwellbeing.org.uk/wp-content/uploads/2019/06/FINAL.pdf> (PDF)

Public life surveys - guidance

- <https://gehlinstitute.org/using-public-life-tools-complete-guide/>

Sustrans' design guidance

- A range of material to cover practical issues that may be encountered when developing a project. <https://www.sustrans.org.uk/for-professionals/infrastructure/walking-and-cycling-infrastructure-design-guidance/>

Designing Streets

- The first policy statement in Scotland for street design emphasising the importance of place-making over a rigid application of standards that result in car dominated environments.

<https://www.gov.scot/binaries/content/documents/govscot/publications/corporate-report/2010/03/designing-streets-policy-statement-scotland/documents/0096540-pdf/0096540-pdf/govscot%3Adocument/0096540.pdf> (PDF)

Town Centre Toolkit

- Ideas and examples of how people and organisations can make their town centre more attractive, more active, and more accessible.

https://www.scotlandstowns.org/town_centre_toolkit

Cycling by Design 2010

- Guidance on developing cycling infrastructure in Scotland. This is currently being refreshed by Transport Scotland.

https://www.transport.gov.scot/media/14173/cycling_by_design_2010_rev_1_june_2011_.pdf (PDF)

Community

Place Standard Tool

- A simple framework to structure conversations about place.

<https://www.placestandard.scot/>

ISM User Guide

- Community engagement training can also be offered as part of a calendar of events to Category 4 partners, if a need is identified in project teams.

<https://www.gov.scot/publications/influencing-behaviours-moving-beyond-individual-user-guide-ism-tool/pages/1/>

National Standards for Community Engagement (2016)

- The National Standards for Community Engagement set out clear principles for effective community engagement, acting as a benchmark for best practice. They are illustrated

with relevant case studies. More information and a range of useful resources is available at <http://www.voicescotland.org.uk/>

Community Empowerment (Scotland) Act 2015

- The aim of the Act is that communities gain greater influence and control over decisions and circumstances that affect them. Further information about the Act is available at <http://www.scdc.org.uk/what/community-empowerment-scotland-act/>

Planning Advice Note 3/2010 Community Engagement (2010)

- PAN 3/2010 provides advice on the legal requirements for community engagement in relation to planning applications, and is available at <https://www.gov.scot/publications/pan-3-2010-community-engagement/>

Equality Act 2010

- The Act legally protects people from discrimination in the workplace and in wider society. It sets out the different ways in which it's unlawful to treat someone. Further information and guidance is available at <https://www.gov.uk/guidance/equality-act-2010-guidance>

Report on equality

- [‘Hard to reach’ or ‘easy to ignore’? Promoting equality in community engagement Evidence Review \(PDF\)](#)

Helpful tools for planning the engagement process

- VOICE (Visioning Outcomes in Community Engagement) is a free online service that assists individuals, organisations and partnerships in the design, delivery, recording, monitoring and evaluation of community engagement. It was developed to implement the National Standards for Community Engagement. Visit <http://www.voicescotland.org.uk/voice/> for more information and to register a free account.
- SP=EED is a practical guide to effective engagement in planning and placemaking, created by PAS to help design, deliver and assess engagement. SP=EED can be used by any individual or organisation involved in designing, delivering or assessing engagement, and as a reference tool by those being engaged. SP=EED is a free online resource, but PAS also offers commercial SP=EED Verification, a two-part training and certification programme. To download a free guide and for more information, visit <http://pas.org.uk/speed/>

- [Participedia](#)- Catalogue for inspiration for community engagement methods
- ISM Guide - [ISM](#) can generate a wide range of ideas for interventions (= activities that can change behaviour). This can help shape a package of interventions that support the infrastructure being used by a diverse range of members of the public.
- Shifting Normal – A [workshop guide](#) with concrete instructions ready to use to generate ideas and concrete ways forward for intervention planning
- Enabling Behaviour Change. [Information Pack \(PDF\)](#) - outlines some of the key issues to consider in the development of initiatives which seek to enable changes in people's travel behaviour and offers practical tips when considering options for addressing barriers to sustainable behaviours.

[Links to national level data that might be useful for understanding target populations and designing initiatives](#)

- Cycling Scotland: [Attitudes and behaviours towards cycling in Scotland \(PDF\)](#)
- National Travel Survey – comprehensive source of national data on transport behaviour
<https://www.gov.uk/government/collections/national-travel-survey-statistics>
- DfT attitudinal research – range of evidence on public attitudes to transport
<https://www.gov.uk/government/statistics/british-social-attitudes-survey-2012-attitudes-towards-transport>

We endeavor to keep all links up to date, but occasionally some resources linked to here may be removed or replaced. If you find that one of these links is broken, please [email us](#) and we will do our best to find a replacement.