

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **30 October 2023**

By: **Lead Officer, Transport for the South East**

Title of report: **Strategic Prioritisation**

Purpose of report: **To provide an update on the development of a strategic prioritisation framework and tool that will support the delivery of the Strategic Investment Plan (SIP).**

RECOMMENDATION:

The members of the Partnership Board are recommended to endorse a framework methodology to support prioritisation decisions, and to agree to the development of a tool to aid that process.

1. Introduction

1.1 This report provides an update on the development of a strategic prioritisation framework methodology that will support the delivery of the Strategic Investment Plan (SIP).

2. Background

2.1 By virtue of their inclusion within the SIP, all the schemes have been identified as priorities for the region. However, we recognise that individual schemes will be delivered through a number of different funding streams and programmes over the long term. Reflecting also that one of the core functions of Sub-national Transport Bodies (STBs) is to provide advice to ministers on prioritising transport investment in their area, there is a need to develop a methodology which will enable Transport for the South East (TfSE) to filter the schemes and identify priorities such as “top 10 lists” either overall or based on a range of differing factors, such as funding streams.

2.2 Any prioritisation framework needs to reflect the current modally based funding landscape for bringing forward schemes and infrastructure to which, in the short term at least, we will need to respond. However, the TfSE Transport Strategy and SIP both advocate a multi-modal approach to planning and delivering transport investment within our area, and it is important that we also develop a process for prioritising schemes within the SIP that meets that overall aspiration. It is also important to consider how TfSE would prioritise schemes if long-term funding was devolved.

2.3 At the Board meeting in July 2023, the Board received an update on work being undertaken to consider strategic prioritisation over the short, medium and long terms, and under differing levels of funding and devolution. Since the July meeting this work has been developed further into a prioritisation framework, including a number of workshops and presentations with Transport Strategy Working Group and Senior Officer Group, which have helped refine the methodology.

3. Strategic Prioritisation Framework

3.1 At the meeting on 30th October 2023, the Board will receive a presentation and have the opportunity to discuss the framework methodology, the key points of which are summarised below:

3.2 The prioritisation framework and methodology has been developed to inform and support decision making. It does not make decisions, that function remains with the Partnership Board. Any prioritised lists of schemes TfSE are asked to prepare will come before the Board for discussion and approval.

3.3 The prioritisation framework has been developed to support three types of decisions:

- Deciding what to focus study money for scheme development on
- Defining the timing and relative priority for schemes that require further development – up to advanced design
- Defining the timing and relative priority for schemes that advance to delivery

3.4 The framework development process has followed four key principles:

- Be evidence informed – prioritisation should make best use of available evidence
- Support decisions – the framework should support decision-makers but does not make decisions
- Resource efficient/carry forward analysis – the framework should not ‘reanalyse’ schemes in the SIP, but should use existing evidence in new ways
- Manage uncertainty – the framework should aid TfSE and partners in navigating an uncertain future funding environment

3.5 The framework conducts prioritisation on a ‘five year basis’ for a range of scenarios (used to manage uncertainty). It results in a prioritised action plan that can guide action from today to 2050 in five year increments. It has four stages as set out below, stages 3 and 4 are an iterative and collaborative process with delivery partners.

- (1) Organise** - Define each scheme based on their current stream (Study, Develop, Deliver) and whether or not they could move to a different stream in this five year window
- (2) Score** - Assemble evidence and score on benefits and requirements. Each scheme will be assessed on four dimensions, which reflect its overall rationale and requirements. This is drawn from analysis conducted for the area studies and the SIP.
- (3) Evaluate** - define which schemes will be prioritised for further study, development, or delivery based on their performance level and the constraints in the scenario
- (4) Finalise Action Plans** – finalise the allocation of schemes to the action plan after initial feedback

3.6 Scenario planning has been incorporated to test how differing degrees of funding and devolution could affect the approach to prioritisation. Scenarios have been developed that reflect different external conditions that could shape the volume, type or timing of schemes that are prioritised. These consider differing levels of

funding that may be available in a given year and the ability to make decisions at a regional level vs. having to make decisions based on programmed national funding.

3.7 The next step is to develop a tool that enables the prioritisation framework methodology to be employed. This work will continue to be undertaken with the involvement of Transport Strategy Working Group and Senior Officer Group who will have the opportunity to view and comment upon the emerging outcomes as the tool is refined.

4. Conclusions

4.1 Board Members are recommended to note progress with the development of a prioritisation framework to support their decision making.

4.2 Board members are also recommended to endorse the framework methodology, and to agree to the development of a tool to aid the process.

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