

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

Date of meeting: **14 November 2022**

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

Title of report: **Delivery of the Strategic Investment Plan (SIP)**

Purpose of report: **To provide an update on work to support delivery of the SIP**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to note the progress with:

- 1) the development of a Delivery Action Plan for the SIP;**
 - 2) the development of an analytical framework to support business cases and the delivery of the schemes within the SIP and;**
 - 3) the development of a TfSE Monitoring and Evaluation Plan**
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1. Introduction

1.1 This report provides an update on three workstreams that will support the delivery of the Strategic Investment Plan (SIP).

2. Background

2.1 Delivering the SIP will require a number of partners, including TfSE, local transport authorities, National Highways, Network Rail and DfT, to work closely together to develop and deliver the schemes and policy interventions it sets out. A number of different approaches to bring forward schemes will also be required, taking account of the different stages of development that schemes are already at and the resources available to TfSE and the delivery partners to progress the work.

2.2 This report sets out the work that is currently underway to prepare for the delivery of the interventions, ensuring the required analytical tools are available, and for the reporting on benefits realisation arising from both place-based and global interventions included in the SIP.

3. SIP Delivery Action Plan

3.1 The SIP contains over 280 multi-modal scheme and policy interventions that are required to be delivered across the South East over the next 28 years, to realise the Vision for 2050 set out in the TfSE Transport Strategy. Delivery of this programme of interventions will require the input of a number of different partners working together, and the exact arrangements will need to vary from scheme to scheme.

3.2 Work is underway to produce a Delivery Action Plan for the SIP. This will build upon the Area Studies Delivery Plan, and will aim to set out the current position with each of the proposed schemes, what the next steps are, who is best placed to undertake the next step and what analytical tools are available and required. This work is being undertaken as a natural extension to the Area Studies work, supported by Steer, and funded from the Area Studies budget.

3.3 A series of workshops with key delivery partners have been undertaken, which examined all the individual schemes in detail and discussed/confirmed with partners the following information:

- Is the scheme in a current programme? (yes/no)
- Stage of development and next steps
- Does the next step need to occur within the next 3 years?
- Who should be the lead delivery partner for the next step?
- Are resources available to undertake the work?
- Priority/Timescales
- Links to other SIP schemes
- What analytical tools are needed, and are these tools available?

3.4 The results of these discussions are being collated into a Delivery Action Plan for the SIP, setting out when, how and by whom the schemes will be progressed. This document will need to be regularly reviewed and updated and will then also form the baseline from which future monitoring and evaluation of the SIP delivery can be measured.

4. Analytical Framework

4.1 Regardless of the delivery route or partner, it is likely that the majority of the schemes within the SIP will require a business case to secure their funding. Developing the business cases will require a suite of analytical tools (an analytical framework) that are collectively capable of assessing the impacts, benefits, and costs of the schemes to provide the necessary assurance to DfT and other funding/delivery partners that the schemes are worthy of delivery.

4.2 TfSE's funding settlement for 2022/23 included an allocation of £300,000 towards the development of an analytical framework. The release of this funding was subject to further discussion with DfT about how this element of work will be taken forward. DfT have subsequently agreed to TfSE undertaking an initial small piece of scoping work, which will then inform further funding discussions and work on developing the analytical framework. Steer have been commissioned (via a direct award through the ESPO Framework) to undertake this initial Analytical Framework scoping work.

4.3 This scoping work will seek to identify:

- what elements an analytical framework will need to contain to support the delivery of the Strategic Investment Plan at pace;
- what local partners require of an analytical framework in broader terms (e.g., LTP development, scheme business case development);

- the extent to which this would align with an STB Common Analytical Framework or require additional investment; and
- at what pace the framework can and should be developed.

4.4 The outputs of this scoping work will be:

- An interim summary note of available tools and suitable tools for future strategy / implementation planning development and scheme / business case development, and;
- A route-map for the analytical framework development with a focus on the next three years

4.5 The scoping work has commenced and it is due to be completed by mid - December 2022. This will enable the outcomes of the work and a route-map for the development of the TfSE Analytical Framework to be presented to the Partnership Board in January 2023.

5. Monitoring and Evaluation Framework

5.1 A clear robust approach to monitoring and evaluation is needed to ensure the successful delivery of the interventions included in the SIP. It will be important to ensure this mechanism provides a clear line of sight from the transport strategy's vision through to intervention level objectives, via the Strategic Investment Plan. It will also be important to discern the outcomes and impacts of interventions at a regional level to understand how much they contribute to the SIP's (and wider TfSE) objectives.

5.2 The Transport Strategy set out the strategic priorities and the key performance indicators (KPIs) that are intended to show how the strategy is progressing. The Area Studies built upon this and used the 'theory of change' links between the investment or policy input at one end of a logic map through to the expected outputs and impacts/outcomes at the other end.

5.3 It is envisaged that TfSE seek to monitor the 'health' of the region against a number of key metrics which are linked to the outcomes and impacts the Strategy is seeking. This "State of the Region" annual monitoring could add considerable value to TfSE and our partners by providing an annual report which collates and presents a number of big-picture metrics (such as around the economy, environment and social inclusion) as well as more specific transport-led outputs which are directly linked to the stated objectives of the Transport Strategy and SIP. This annual report could set trajectories for those metrics and demonstrate each year whether the region as a whole is on or off trajectory.

5.4 This work is being undertaken by Steer as part of the SIP commission and further details will be presented to the Partnership Board in January 2023.

6. Conclusions

6.1 Board Members are recommended to note that the following three pieces of work are being undertaken to support the delivery of the SIP, and that further updates will be provided to the Partnership Board in January 2023.

- the development of a Delivery Action Plan for the SIP;
- the development of an analytical framework to support business cases and the delivery of the schemes within the SIP and;
- the development of a TfSE Monitoring and Evaluation Plan

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