

Monitoring and Evaluation



- A clear robust approach to monitoring and evaluation would:
 - ensure the successful delivery of the interventions included in the SIP
 - provide a clear line of sight from the transport strategy's vision through to intervention level objectives, via the SIP.
 - 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.
- It must also
 - Add value to DfT and TfSE partners

TfSE's Transport Strategy


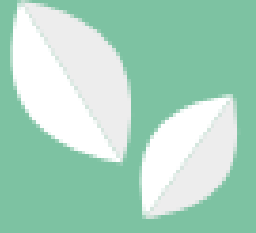
What does the Strategy say about M&E?

“Transport for the South East will use a set of key performance indicators to monitor how well the strategy is progressing. These key performance indicators will consist of a range of measures that will be used to assess the extent to which the strategic priorities, outlined in Chapter 3 (paragraph 3.15), are being achieved. The key performance indicators that are going to be used to monitor the performance are listed in Table 5.1 below.”

KPI's in the Strategy

	Strategic Priorities	Indicators
 Economic	Better connectivity between our major economic hubs, international gateways (ports, airports and rail terminals) and their markets.	<p>The delivery of improved road and railway links on corridors in need of investment.</p> <p>Improved public transport access to Heathrow and Gatwick Airports.</p> <p>Improved long-distance rail services (measured by journey time and service frequency).</p>
	More reliable journeys for people and goods travelling between the South East's major economic hubs and to and from international gateways.	<p>Improved Journey Time Reliability on the Strategic Road Network, Major Road Network, and local roads (where data is available).</p> <p>Improved operating performance on the railway network, measured by Public Performance Measure (PPM) and other available passenger and freight performance measures, where available (e.g. right time delivery).</p>
	A transport network that is more resilient to incidents, extreme weather and the impacts of a changing climate.	<p>Reduced delays on the highways network due to poor weather.</p> <p>Reduced number of days of severe disruption on the railway network due to poor weather.</p> <p>Metrics relating to reduced delay on road network suffering from Road Traffic Collisions.</p>
	A more integrated approach to land use and transport planning that helps our partners across the South East meet future housing, employment and regeneration needs sustainably.	The percentage of allocated sites in Local Plans that are developed in line with Local Plans.
	A 'smart' transport network that uses digital technology to manage transport demand, encourage shared transport and make more efficient use of our roads and railways.	<p>Increase in the number of bus services offering 'Smart Ticketing' payment systems.</p> <p>Number of passengers using 'Smart Ticketing'.</p> <p>Number of passengers using shared transport.</p>
 Social	A network that promotes active travel and active lifestyles to improve our health and wellbeing.	<p>Increase in the length of the National Cycle Network in the South East.</p> <p>Increase in the length of segregated cycleways in the South East.</p> <p>Increase mode share of trips undertaken by foot and cycle.</p> <p>Number of bikeshare schemes in operation in the area.</p> <p>Mode share of walking and cycling.</p>

KPI's in the Strategy (2)

	Strategic Priorities	Indicators
 Social	Improved air quality supported by initiatives to reduce congestion and encourage further shifts to public transport.	Reduction in NOx, SOx and particulate pollution levels in urban areas.
	An affordable, accessible transport network for all that promotes social inclusion and reduces barriers to employment, learning, social, leisure, physical and cultural activity.	A reduction in the indicators driving the Indices of Multiple Deprivation in the South East, particularly in the most deprived areas in the South East area.
	A seamless, integrated transport network with passengers at its heart, making it simpler and easier to plan and pay for journeys and to interchange between different forms of transport	Increase in the number of cross-modal interchanges and/or ticketing options in the South East.
	A safely planned, delivered and operated transport network with no fatalities or serious injuries among transport users, workforce or the wider public.	Reduction in the number of people Killed and Seriously Injured by road and rail transport.
 Environmental	A reduction in carbon emissions to net zero by 2050 to minimise the contribution of transport and travel to climate change.	Reduction in carbon emissions by transport.
	A reduction in the need to travel, particularly by private car, to reduce the impact of transport on people and the environment.	<p>A net reduction in the number of trip kilometres undertaken per person each weekday.</p> <p>A reduction in the mode share of the private car (measured by passenger kilometres).</p>
	A transport network that protects and enhances our natural, built and historic environments.	<p>No transport schemes or interventions result in net degradation in the natural capital of the South East, instead aiming for environmental net gain for priority ecosystem services (such as natural flood risk management).</p> <p>No transport schemes or interventions result in a net loss of biodiversity, but seek to achieve a minimum of 10% net gain in biodiversity managed for 30 years, in line with the requirements of the Environment Bill.</p>
	Use of the principle of 'biodiversity next gain' (i.e. development that leaves biodiversity in a better state than before) in all transport initiatives	<p>Use of the principle of 'biodiversity next gain' in all transport initiatives.</p> <p>No transport schemes or interventions result in a net loss of biodiversity, but seek to achieve a minimum of 10% net gain in biodiversity managed for 30 years, in line with the requirements of the Environment Bill.</p>
	Minimisation of transport's consumption of resources and energy.	Reduction in non-renewable energy consumed by transport.

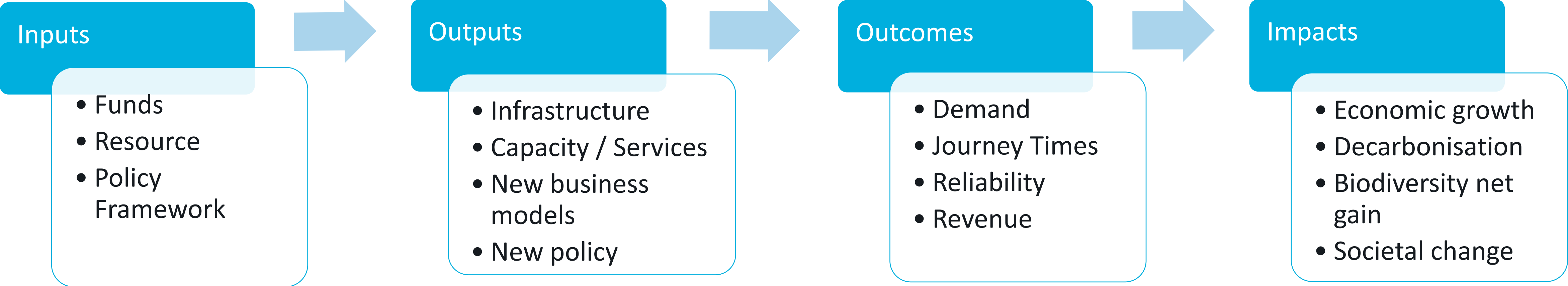
TfSE's Strategic Investment Plan

What does the Strategic Investment Plan say about M&E?

“A selection of potentially suitable KPIs for monitoring and evaluation the Packages of Interventions in this Plan are presented in Table 5 on the following pages.

During the consultation period on the Strategic Investment Plan, a set of KPIs and targets will be identified.”

Introduced the idea of using ‘Theory of Change’ models



TfSE's Strategic Investment Plan – Theory of Change – Public Transport

Inputs	Outputs	Outcomes	Impacts
<ul style="list-style-type: none"> • Integrated planning for transport, land use and wider policy • Policy and guidance shaping the nature of the interventions developed • Funding invested in bus, ferry, mass transit and shared mobility • Staff resource to create, design and deliver schemes 	<ul style="list-style-type: none"> • Delivery of Global Policy Interventions: reduction in public transport fares • Delivery of bus, ferry, mass transit and shared mobility Interventions: capacity (seats, services per hour), and connectivity (better journey times, frequencies, direct/indirect services, 'turn up and go' service, internet connectivity) 	<ul style="list-style-type: none"> • Journey Time/Reliability: improvements for specific groups, perturbation recovery • Demand: increased public transport usage • Modal shift: public transport mode share increased, move to non-carbon emitting transport modes • Resilience and performance: Operating performance indicators (e.g. minutes delay/early, cancellations, etc.) • Quality: Customer Satisfaction Surveys, Service Quality Regimes, Mystery Shopper Regimes, other "trust" related/reliable indicators, enhanced interchange • Accessibility and reduced community severance: improvement for all passengers and communities, especially for people with protected characteristics -number of fully accessible stops and stations, portion of buses, ferries, trams and other vehicles that are fully accessible • Affordability: Affordable fares for all, new products to make attractive • Revenue: Revenue raised per annum 	<ul style="list-style-type: none"> • Reduced carbon emissions to net-zero: reduced trip rates, higher sustainable transport mode share, fewer private vehicle kilometres, lower or zero emission per vehicle kilometre • Productivity: Boosted through better skills matching, knowledge sharing and agglomeration • Reduced poverty: for all residents and enable the "levelling up" of socioeconomic outcomes. • More financially sustainable public transport: Portion of operating costs recovered through revenue • Realisation of TfSE's Vision and Objectives presented in Part 4 of this Plan • Resolution of the Problem Statements identified in Part 4 of this Plan

Measuring Success



Outcomes and Impacts

- Adapting to a New Normal
- Decarbonisation and Environment
- East West Connectivity
- Economy
- Freight and Global Gateways
- Levelling Up Left Behind Communities
- Resilient Radial Corridors
- Society

+ Associated Targets

Considerations

Specifically in relation to TfSE two issues should be considered:

1. Compared to a traditional LTP type approach TfSE are not in direct control of most of the levers to secure success:
 - Funding
 - Decision making
 - Delivery powers
 - Policy
2. The high-level aspirations/objectives set by TfSE are influenced by a large number of other externalities – not just transport – so it is unlikely that change could be entirely attributed to the Transport Strategy or SIP.

State of the Region

- TfSE has an opportunity to track the region's progress towards the aspirations and objectives of the Strategy, without necessarily attributing success or failure to the Transport Strategy itself.
- The 'State of the Region' could become a bi-annual report presenting data and trends on high-level metrics:
 - Economy – e.g. jobs, productivity, exports
 - Society – e.g. Income levels, educational attainment, health
 - Environment – e.g. carbon, biodiversity
- The progress of delivering against the SIP will also need to be presented, possibly annually, to hold promoters to account for the programme set out.

TSWG Workshop agreed that:

- TfSE and its Partnership Board should take **responsibility for the delivery and performance of the Transport Strategy and SIP** as they are the appropriate mechanism to hold delivery partners to account.
- Setting **targets and trajectories should be on a ‘horses for courses’ basis** – there could be a number of indicators or metrics where target setting may seem appropriate.
- Any targets set for TfSE would need to be **endorsed through the TfSE governance structure.**
- **TfSE should generate a monitoring report** (either annual or bi-annual) which shows the general progress of the region against indicators and metrics identified in the Transport Strategy and SIP.
- Partners agreed that TfSE should **collate and publish SIP delivery monitoring**, which will require partners to present a programme for their schemes and TfSE to monitor progress against key milestones.
- **There could be a role for TfSE in the future to help Local Transport Authorities monitor and evaluate** the outputs, outcomes and impacts of their schemes through guidance, training, data collection, and/or grant funding.

What can be measured?

Without wanting to create a burden of annual data collection, we've concentrated on data which is publicly available. Metrics include:

Theme	State of the Region Metric	Annual Data Source	Historic data available?
<p>Economy</p> <p>Seeking to demonstrate that the TfSE region is moving forward in terms of economic growth and productivity.</p> <p>Metrics are linked to those for which connectivity is highly important.</p>	Productivity	ONS - GVA Per worker	Yes – ONS and the Cambridge Econometrics data
	Jobs (by targeted industry sector)	NOMIS – industry sector workers	Yes – NOMIS and the Cambridge Econometrics data
	Exports	ONS - <u>Exporters and importers by regional breakdown (Annual Business Survey) - Office for National Statistics (ons.gov.uk)</u>	Yes – data goes back to 2017
	Start ups – this is a useful measure of how attractive a region is to new businesses	ONS – Business demography data <u>Business demography, quarterly experimental statistics, UK - Office for National Statistics (ons.gov.uk)</u>	Yes – data goes back to 2017

What can be measured?

Without wanting to create a burden of annual data collection, we've concentrated on data which is publicly available. Metrics include:

Theme	State of the Region Metric	Annual Data Source	Historic data available?
Society Seeking to demonstrate that the TfSE region is becoming a more equitable society: That jobs growth is benefiting those most in need and that health inequalities are being improved through a more active population.	Unemployment	ONS – Modelled unemployment	Yes - ONS
	Access to Further Education	Number of people from left behind places who can access Further Education establishments within 30/45 mins by public transport https://www.gov.uk/government/statistical-data-sets/journey-time-statistics-data-tables-jts#journey-times-to-key-services-by-local-authority-jts04	Yes – data goes back to 2014, Data doesn't seem to be published annually.
	Average Income	ONS – Gross disposable household income by authority	Yes – data back to 1998
	Health	Adult inactivity levels – possibly available at: https://ukdataservice.ac.uk/find-data/browse/health/ https://digital.nhs.uk/data-and-information/publications/statistical/statistics-on-obesity-physical-activity-and-diet/england-2020	Yes – data goes back to 2015






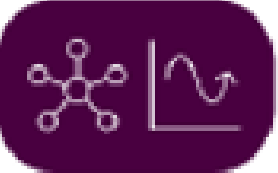
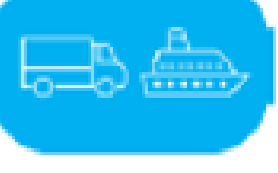
What can be measured?

Without wanting to create a burden of annual data collection, we've concentrated on data which is publicly available. Metrics include:

Theme	State of the Region Metric	Annual Data Source	Historic data available?
Environment Seeking to demonstrate how the TfSE region is both reducing its impact on climate change, air pollution and having a positive impact on important natural capital.	Carbon Generally and Specifically from Transport	BEIS Published Carbon Emissions	Yes – from BEIS datasets
	Air Quality	No. of people living in areas of exceedance – data collected and presented here: ENV02 - Air quality statistics - GOV.UK (www.gov.uk) use GIS to measure population in each area	Yes
	Habitat	DEFRA publish national statistics, so it could be possible to get regional data from them. Needs further investigation. https://www.gov.uk/government/statistics/england-biodiversity-indicators	It does appear from DEFRA reports that historical data is available. But it's not know at what granular scale.

What can be measured?

Transport specific metrics:

TfSE Challenge Priority	Indicator	Dashboard Data
Decarbonisation and Environment 	Carbon emissions from transport	BEIS Carbon Data Take up of EVs in the region Delivery of EV charging infrastructure
	Adaptation to climate change	Events linked to climate – <u>e.g.</u> closure of roads/rail due to flooding or excess heat etc
	Bio-diversity net-gain	No. of transport projects delivered with a net-gain
Adapting to a New Normal 	Viability of public transport services	PT usage statistics
	New relationship with EU	Congestion / delays at key ports – number of major incidents
Levelling Up Left Behind Communities 	Affordability of public transport	Average daily bus fare as proportion of household income Number of people using smart ticketing products
	Accessibility of left-behind places	Proportion of people living in the most deprived areas who can access key services within 30 mins by PT – definition of key services TBC
Regeneration and Growth 	Accessible housing delivered	Proportion of new dwellings delivered in 'high accessibility' areas
East-West Connectivity 	Journey times by rail travelling east-west between major conurbations	Journey times by rail travelling east-west between major conurbations
	Journey times by highway travelling east-west between major conurbations	Journey times by highway travelling east-west between major conurbations
Resilient Radial Corridors 	Journey time reliability on radial rail corridors	Journey time reliability on radial rail corridors
	Journey time reliability on radial road corridors	Journey time reliability on radial road corridors
Freight and Global Gateways 	PT Accessibility to Heathrow and Gatwick	Number of people living within 1 <u>hour's</u> travel time by PT (including access) of each airport
	Highway journey times to key freight ports	Maximum distance travelable within 4 hours of the port

Monitoring SIP Delivery

If TfSE were to monitor and publish scheme progress it may only need to be light touch.

Expectations would be for promoters to provide simple scheme updates (including progress towards funding, planning and delivery) annually.

Transport Mode	Infrastructure delivered
Cycle	Length of segregated cycleway Length of non-segregated cycleway
Bus	Length of bus priority Diesel buses replaced with zero emission vehicles
Mass transit	Length of mass transit
Rail	Named schemes and outcomes delivered Length of electrification New stations
Highway	Named schemes and multi-modal outcomes delivered
Ticketing	New products available, particularly supporting multi-modal or 'MaaS'
Electric Vehicle Infrastructure	Publicly available charge points

Targets and Trajectories

- Working Group Officers felt strongly that TfSE should set targets for certain metrics, based on what the Strategy and SIP are setting out to achieve.
- Any targets (end state and interim) set will need to be owned by the partnership, and hence signed-off through the governance structure.
- Many of these will be driven bottom-up by LTPs. Can TfSE set a regional target if there aren't local targets?
- Further consideration and work needed...

Next Steps

- Themes for and actual targets will need to be discussed and agreed through each layer of the TfSE governance structure.
- First step will be to take some recommendations and workshop them with the Transport Strategy Working Group.
- Recommendations from that group will be brought back to future Senior Officer Group and Transport Forum meetings
- Work will continue on preparing a draft of the State of the Region report (minus section on targets) which will set out the baseline position.