



METROWEST PHASE 1

Outline Business Case

Appendix 3.6

Monitoring, Evaluation and Benefits Realisation Plan

December 2017



Bath & North East Somerset, Bristol, North Somerset and South Gloucestershire councils working together to improve your local transport

MetroWest Phase 1: Monitoring, Evaluation and Benefits Realisation Plan

Prepared for
West of England Councils

December 2017



1 The Square
Temple Quay
Bristol
BS1 6DG

Contents

Section	Page
Acronyms and Abbreviations	v
Introduction.....	1-1
1.1 Purpose of this Report	1-1
1.2 Summary of approach.....	1-1
1.3 The MetroWest Phase 1 Programme	1-2
1.4 Structure of this Report	1-2
Identifying and Quantifying Benefits	2-1
2.1 Introduction	2-1
2.2 Project Objectives	2-1
2.3 Problems	2-1
2.4 Project Benefits.....	2-2
2.4.1 Benefits Alignment	2-3
2.5 Benefit Ownership	2-3
2.6 Benefit Categorisation and Prioritisation	2-3
Scheme Delivery and Costs.....	3-1
3.1 Introduction	3-1
3.2 Approach.....	3-1
3.3 Assessment and Reporting	3-1
Scheme Operational Performance.....	4-1
4.1 Introduction	4-1
4.2 Approach.....	4-1
4.3 Performance Measures.....	4-1
4.4 Data Collection.....	4-2
4.5 Reporting of Monitoring Activities	4-3
Evaluation.....	5-1
5.1 Introduction	5-1
5.2 Demonstrating Benefit Realisation.....	5-1
5.3 Evaluating Objective Achievement.....	5-2
5.4 Identifying Unintended Impacts	5-3
5.5 Economic Evaluation.....	5-3
5.6 Reporting Benefit Realisation and Evaluation	5-3
Delivery of this Plan	6-1
6.1 Introduction	6-1
6.2 Responsibilities	6-1
6.3 Governance	6-1
6.4 Costs.....	6-1
6.5 Risks and Mitigations	6-1

Table(s)

- 2.1 Problems, Objectives and Benefits
- 4.1 Data Sources
- 4.2 Data Collection and Collation by Stage
- 5.1 Monitoring Outputs to Demonstrate Benefit Realisation (primary link)
- 5.2 Demonstrating Objective Achievement

Acronyms and Abbreviations

ATC	Automatic Traffic Count
BCR	Benefit to Cost Ratio
DfT	Department for Transport
GVA	Gross Value Added
JTW	Journey to Work
LEP	Local Enterprise Partnership
OBC	Outline Business Case
SRO	Senior Responsible Officer
TQEZ	Temple Quay Enterprise Zone
WoE	West of England

Introduction

1.1 Purpose of this Report

CH2M has been appointed to support with the preparation of the Outline Business Case (OBC) for MetroWest Phase 1. This report sets out the monitoring, benefits realisation and evaluation plan for the scheme, covering the approach to determining the projected benefits and objectives, and monitoring of impacts.

The plan includes information requirements, responsibilities and milestones. By effectively planning for benefit realisation and evaluation at the early stage of the project, it will help to maximise the benefits that can be realised for society, provide value for money and enable lessons learnt to be shared, by measuring and improving performance over time on MetroWest Phase 1.

1.2 Summary of approach

The proposed approach has been developed to support the assessment of outputs and impacts of the scheme in delivering the desired benefits and overarching objectives. The depth of the approach reflects the scale and type of scheme, plus the resources available to complete the evaluation. The approach will result in an evidence base of data that will feed into the overall benefits realisation assessment, which in turn will inform stakeholders, and, where necessary, refine future scheme development.

The evaluation will include quantitative and qualitative measures, thereby covering a range of outcomes and impacts.

Based on DfT monitoring and evaluation guidance, and the requirement to undertake ‘fuller evaluation’ for this scheme, the key types of questions to be addressed through this process are:

- Was the scheme delivered to costs and timescale?
- What lessons can be learnt to help shape future transport strategies?
- Has the scheme delivered the desired outcomes and benefits identified?
- Has the scheme had any unpredicted impacts?

The requirements for monitoring outlined in the September 2012 guidance have been used to guide the approach. The requirements are:

- Scheme build
- Delivered scheme
- Costs
- Out-turn value for money
- Scheme objectives
- Travel demand, including behavioural change
- Travel times and reliability of travel times
- Impacts on the economy
- Carbon Impacts
- Noise
- Local air quality

- Accidents

This plan is defined in two parts, with the first part covering the first three areas listed above on the scheme build, delivery and costs, and the second area covering the scheme outputs, outcomes analysis and impacts to inform the benefits realisation. The second part will draw on the requirements in so far as they are applicable for the scheme.

1.3 The MetroWest Phase 1 Programme

The MetroWest concept is to deliver an enhanced local rail offer for the sub-region comprising:

- Existing and disused rail corridors feeding into Bristol
- Increased service frequency; cross-Bristol service patterns (e.g. Bath to Severn Beach)
- A Metro-type service appropriate for a city region with a population which exceeded 1 million in 2016

The project:

- Includes works to 4 tunnels, 3 viaducts, 12 under bridges, 14 over bridges and 3 km of retaining walls
- Includes 16 km of railway works and 1 km of highway works
- Will have a line speed of 75 mph between Portishead and Pill and 30 mph from Pill to Ashton Vale
- Includes some environmentally important areas along the railway alignment, including Avon Gorge which is a Special Area of Conservation
- Will be delivered in collaboration with Network Rail and the West of England councils, subject to business case, powers to build and operate, and allocation of funding
- Will increase the UK national passenger network by 14km, by re-instating the Portishead rail line into the national rail network, and adding 2 new stations by reopening Portishead and Pill
- Will upgrade the existing service frequency at 16 stations across 3 rail corridors, directly benefiting 180,000 people
- Will provide a service operated by modern diesel trains, with 3 carriages initially, with up to 270 seats

The project will result in measurable usage of the service and new stations; modal shift, resulting in reducing traffic pressures on key corridors; and increased patronage at existing stations across the local rail network. Wider outputs expected by the scheme include:

- Very high value for money, with a Benefit to Cost Ratio of 4.3, giving £4.30 of quantified benefits for every £1 invested to implement the scheme
- Generation of a revenue surplus every year from year 6 onwards
- Supporting the delivery of the 105,000 new homes and 82,500 new jobs identified in the WoE Joint Transport Study and WoE Joint Spatial Plan

1.4 Structure of this Report

This plan has been structured to provide the outline approach required to satisfy the requirements of the OBC. It includes the following sections:

- Identification and quantification of the benefits
- Scheme delivery and costs, considering scheme build, delivered scheme and outturn costs

- Scheme operational performance
- Evaluation
- Delivery of this plan

Identifying and Quantifying Benefits

2.1 Introduction

The project objectives were developed and agreed at project outset. Benefits have been identified related to each objective, which will be used to demonstrate the extent of the realisation. Stakeholders have been involved at all stages of objective and benefit identification.

2.2 Project Objectives

MetroWest Phase 1 will support the policies and objectives set out in the Joint Local Transport Plan 3 and 'place' aspect of the LEP vision. The MetroWest Phase 1 principal business objectives are:

- To support economic growth, through enhancing the transport links to the Temple Quarter Enterprise Zone (TQEZ) and into and across Bristol city centre, from the Portishead, Bath and Avonmouth and Severn Beach arterial corridors
- To deliver a more resilient transport offer, providing more attractive and guaranteed (future-proofed) journey times for commuters, business and residents into and across Bristol, through better utilisation of strategic heavy rail corridors from Portishead, Bath and Avonmouth, and Severn Beach
- To improve accessibility to the rail network with new and reopened rail stations and reduce the cost (generalised cost) of travel for commuters, business and residents
- To make a positive contribution to social well-being, life opportunities and improving quality of life, across the three arterial corridors

In addition, the MetroWest Phase 1 supporting objectives are:

- To contribute to reducing traffic congestion relative to a 'Do Minimum' scenario (as opposed to current levels of congestion) on the Portishead, Bath and Avonmouth, and Severn Beach arterial corridors
- To contribute to enhancing the capacity of the local rail network, in terms of seats per hour in the AM and PM peak
- To contribute to reducing the overall environmental impact of the transport network, by enhancing the public transport offer, which in turn reduces car dependency

2.3 Problems

The underlying cause for the scheme is the excess of travel demand over available capacity, which will be exacerbated with development. Without intervention, the local train network's contribution to meeting the transport needs of the sub-region will be limited. Furthermore, the local highway network is already systemically congested in key areas. The overall impact would result in constraints to accessing employment opportunities, which would restrict economic growth.

Recognising this, the project aims and objectives will help to address a number of problems in the West of England area, including:

- **Capacity on rail network:** Lack of capacity (particularly short formation rolling stock) and connectivity across the Bristol area
- **Rail service pattern:** Lack of a standard, 'clock-face' half hourly service pattern across the local rail network, making planning of journeys more difficult

- **Resilience:** Poor transport network resilience, particularly related to the knock-on effects of incidents on the M5, with high volumes of traffic using a constrained local road corridor with few alternative route options. This consequently causes substantial loss of productivity and wider disruption to transport network users (the public)
- **Network offer:** The A369 is the only transport corridor directly linking Portishead with Bristol, which is 10 miles to the east. Capacity constraints are exacerbated by the corridor crossing junction 19 of the M5, one of the busiest parts of the motorway, with the Avonmouth Bridge immediately to the north
- **Air quality:** Poor air quality in areas of Bristol and Bath
- **Alternative to private car:** Lack of real alternatives to the car for some residents and businesses (for example, Portishead and cross-Bristol trips)
- **Car dependency:** High levels of car dependency across the West of England exasperated by limited travel choices in many areas, which will continue into the medium to long term if sustainable travel choices are not broadened
- **Deprivation:** Areas of multiple deprivation, for example north-western parts of Bristol (alongside the Severn Beach line) and parts of Bristol City

2.4 Project Benefits

A comprehensive long-list of benefits has been compiled to meet the project objectives. These have been identified through technical work, consultation and stakeholder liaison. The benefits are both qualitative and quantitative, and financial and non-financial, and consider impacts across the sub-region.

The benefits of the project have been identified as:

- **B1: Increase the capacity of the local economy** by generating £264M of Gross Value Added (GVA) in first ten years from opening and creating 514 net new permanent jobs
- **B2: Enhance rail capacity** by delivering over 600 additional seats per hour for the local rail network, which in turn will extend the benefits of Network Rail's Western Route Modernisation Programme
- **B3: Deliver a reliable and more frequent public transport service**, directly benefitting 180,000 people within 1km of 16 existing stations, with enhanced train service frequency
- **B4: Increase the number of people living within 30 minutes travel time of key employment areas**, such as TQEZ
- **B5: Reduce highway congestion** on arterial corridors, including A369 between Portishead and Bristol, significantly improving network resilience
- **B6: Provide competitive journey times** from Portishead and Pill to Bristol Temple Meads (around 23 minutes)
- **B7: Improve accessibility** to sites for new homes and employment development in proximity to the rail corridors and bring an additional 50,000+ people within the immediate catchment of the rail network with new stations at Portishead and Pill
- **B8: Reduce overall environmental impact**, resulting in improved air quality, on key arterial highway routes
- **B9: Provide attractive mode choice** and capacity for journeys to work (alternatives to single occupancy car-based travel) addressing long-term car dependency
- **B10: Provide wide ranging social/health benefits**

2.4.1 Benefits Alignment

The alignment between the problems MetroWest Phase 1 is seeking to address, project objectives and anticipated benefits is shown in Table 2.1.

Table 2.1: Problems, Objectives and Benefits

2.5 Benefit Ownership

Accountability for the delivery of the expected benefits is assigned to the MetroWest Phase 1 Project Team. Ownership at this level will enable the identification of activities that might be required to demonstrate the realisation of the benefits.

2.6 Benefit Categorisation and Prioritisation

It is recognised that delivery of this project could also result in disbenefits to some stakeholders or geographical locations. Risk workshops have been held to consider the risks and identify acceptable processes for working with those affected to identify mitigations. Further work is being undertaken on these through the preparation of the Business Case submission.

Scheme Delivery and Costs

3.1 Introduction

The first area of monitoring and evaluation will assess the success of the planning and implementation processes adopted for the scheme.

3.2 Approach

This aspect of the evaluation is intended to demonstrate the successful project delivery process. Therefore, it should provide evidence of the delivery process and overall delivery cost of the scheme. The three areas of monitoring, evaluation and reporting will be:

- Scheme Build - covering procurement of the scheme, achievement of timescale and key milestones, risk outcomes, stakeholder feedback
- Delivered Scheme – covering scheme refinements and success of the proposed design and materials used. This will include any measures taken to minimise any identified negative impacts during construction
- Outturn Costs will be compared to forecasts covering capital and on-going operating and maintenance costs, ensuring the scheme remains affordable and demonstrates value for money. The latter will be based on the outturn Benefit Cost Ratio (BCR) of the scheme based on final costs and benefits outcomes

This area of monitoring and evaluation will be led by the SRO and Project Manager

3.3 Assessment and Reporting

These aspects of the scheme will be reported within 1 year of scheme opening. The intention is that the evidence can then be used to support the case for similar schemes within the West of England and elsewhere in the UK.

Scheme Operational Performance

4.1 Introduction

This section details the key activities that are required to manage the successful realisation of the benefits. The approach developed should enable the benefits that are expected to be derived from the scheme to be planned for, tracked and realised.

4.2 Approach

The second area of evaluation considers the delivery of the scheme's objectives and benefits. The approach relies on effective and efficient monitoring to enable evaluation.

The benefits are the result of the scheme successfully addressing the identified objectives. To make this assessment, before and after monitoring is required to establish if the scheme itself has had the desired impact. The evaluation is used to match actual impacts and check strategy fit, feedback and refinement to ensure lasting and long-term realisation of benefits.

4.3 Performance Measures

The monitoring of the benefits will demonstrate the success of the scheme. The wide range of benefits being sought mean different types of data are required. Some of this data is being collected as part of ongoing monitoring in the sub-region.

Baseline data is required so any changes following scheme implementation can be assessed. To demonstrate benefits realisation, different types of data have been identified for collection. Table 4.1 shows the identified monitoring requirements alongside the rationale for inclusion and anticipated frequencies.

Table 4.1: Data Sources

Measure	Rationale for inclusion	Frequency of data collection
M1: Traffic flows	Understand changes in flow in key corridors and links on highway network (indicator of mode shift after scheme implementation)	Minimum 2 weeks in year -1, +1, and +5
M2: Journey time	Understand time saving benefits on the three corridors into Bristol Temple Meads, including comparison of car and train times	At least one day in year -1, +1, and +5
M3: Stakeholder feedback	Understand views of stakeholders on scheme delivery and impacts, and understand some of the less quantified effects e.g. satisfaction	Year -1, +1, and +5
M4: Use of local rail services	Understand use of new stations and if patronage has increased at stations with improved service frequency	At least one day in year +1, and +5
M5: Mode share for journeys to work	Understand if new rail services are being used for journeys to work	At least one day in year -1, +1, and +5
M6: Accessibility to key employment sites	Understand increase in population within journey time threshold of key employment sites	At opening and if any significant development in proximity of stations

Measure	Rationale for inclusion	Frequency of data collection
M7: Carbon impacts/noise/local air quality	Understand the environmental benefits the scheme brings to the area	To be agreed
M8: Social health and accidents	Understand if deprivation levels have changed in the super output area each station is in	Year -1, +1, and +5
M9: Accidents	Understand if the scheme has had any impact on accidents in the vicinity of existing and new stations	Year -1, +1, and +5

4.4 Data Collection

The timescale for data collection stages are:

- Stage 1: Before opening – to develop a full baseline for future comparison. This is taking place in 2018/19.
- Stage 2: +1 year after completion and opening of the scheme (2024). This stage will enable the team to gain an interim understanding of how benefits realisation is progressing. This will provide the opportunity to refine the approach, if required, to ensure benefits can be maximised in the longer-term.
- Stage 3: +5 year – five full years after opening, to provide a final report on the level of benefit realisation and extent of objective achievement. This will take place in 2026.

Table 4.2 shows data collection and collation that needs to be completed at each stage.

Table 4.2: Data Collection and Collation by Stage

Monitoring Outputs (M)	Stage 1 – before opening	Stage 2 – 1 year after	Stage 3 - 5 years after
M1: Traffic flows	Locate existing ATC sites or put in temporary sites for data collection on main routes	Repeat Stage 1 surveys	Repeat Stage 1 surveys
M2: Journey time	Travel times by vehicle on routes impacted by the schemes, covering peak and off-peak times of day. Manual observation or use of relevant IT e.g. google	Repeat Stage 1 surveys	Repeat Stage 1 surveys
M3: Stakeholder feedback	Collate existing feedback from stakeholders, including elected Members and LEP, gained as part of development of objectives and benefits for this scheme. Consider on-going consultation process on transport strategies/schemes in the sub-region	Collate new feedback from stakeholders on scheme impacts and benefits	Repeat Stage 2 surveys
M4: Use of local rail services	Use of WoE annual rail survey (existing stations)	Use of WoE annual rail survey (existing and new stations)	Repeat Stage 2 surveys
M5: Mode share for journeys to work	Local and regional existing data sets will be used to monitor mode share	Local and regional existing data sets will be used to monitor mode share	Local and regional existing data sets will be used to monitor mode share
M6: Accessibility to key employment sites	Accessibility modelling for key employment sites in WoE area	Repeat Stage 1 surveys	Repeat Stage 1 surveys

Monitoring Outputs (M)	Stage 1 – before opening	Stage 2 – 1 year after	Stage 3 - 5 years after
M7: Carbon impacts/noise/local air quality	Monitoring of noise and local air quality will align with the Environmental Statement, which is currently being developed. This will focus on Portishead and Pill. The impacts of carbon associated with highways trips can be calculated following collection of data in M1.	As Stage 1	As Stage 1
M8: Social health	Collate crime and education from relevant LA departments police and Census	Repeat Stage 1 surveys	Repeat Stage 1 surveys
M9: Accidents	Use STATS19 data to record situation in vicinity of existing stations	Use STATS19 data to record situation in vicinity of existing and new stations	Repeat Stage 2 surveys

4.5 Reporting of Monitoring Activities

A baseline report will be prepared, providing a record of relevant data prior to scheme implementation, so the impact of the scheme can be understood and demonstrated. This will be followed by evaluation reports in years +1, and +5.

Reports will be published and reported to the West of England Joint Committee, the Programme Assurance Board and Rail Programme Board. Internal reporting will be provided to the Rail Programme Board and other stakeholders.

Evaluation

5.1 Introduction

Evaluation is required to assess scheme effectiveness and efficiency during and after implementation. The monitoring activities will provide the data required to check progress against planned targets and benefits, enabling the evaluation to demonstrate:

- How the scheme delivered – was it implemented efficiently and effectively?
- What difference the scheme has made – what outcomes and impacts have been generated?
- If the benefits have justified the costs – have the costs of the scheme been outweighed by the benefits?

Evaluation will be used to inform further work in the sub-region, including other MetroWest Phases. Lessons learned, and issues identified for further consideration to maximise future realisation of benefits, will be highlighted. These will be disseminated to the benefit owners, for them to share with relevant local authority teams and stakeholders, to ensure necessary changes can be made for future years.

5.2 Demonstrating Benefit Realisation

The monitoring outputs will be used to demonstrate the realisation of the benefits and objectives. The assessments will be reported and used to refine future monitoring, delivery and lessons learned for similar schemes. The primary relationships between the monitoring outputs and benefits are shown in Table 5.1.

Table 5.1: Monitoring Outputs to Demonstrate Benefit Realisation (primary link)

Benefits	M1: Traffic flows	M2: Journey time	M3: Stakeholder feedback	M4: Use of local rail	M5: Mode share (JtW)	M6: Accessibility	M7: Air Quality	M8: Social health
B1: Increase the capacity of the local economy by generating £264M of Gross Value Added (GVA) in first ten years from opening and creating 514 net new permanent jobs								
B2: Enhance rail capacity by delivering over 600 additional seats per hour for the local rail network, which in turn will extend the benefits of Network Rail's Western Route Modernisation Programme								
B3: Deliver a reliable and more frequent public transport service , directly benefitting 180,000 people within 1km of 16 existing stations, with enhanced train service frequency								
B4: Increase the number of people living within 30 minutes travel time of key employment areas , such as TQEZ								

Benefits	M1: Traffic flows	M2: Journey time	M3: Stakeholder feedback	M4: Use of local rail	M5: Mode share (JtW)	M6: Accessibility	M7: Air Quality	M8: Social health
B5: Reduce highway congestion on arterial corridors, including A369 between Portishead and Bristol, significantly improving network resilience								
B6: Provide competitive journey times from Portishead and Pill to Bristol Temple Meads (around 23 minutes)								
B7: Improve accessibility to sites for new homes and employment development in proximity to the rail corridors and bring an additional 50,000+ people within the immediate catchment of the rail network with new stations at Portishead and Pill								
B8: Reduce overall environmental impact , resulting in improved air quality, on key arterial highway routes								
B9: Provide attractive mode choice and capacity for journeys to work (alternatives to single occupancy car-based travel) addressing long-term car dependency								
B10: Provide wide ranging social/health benefits								

Given that the benefits may be time limited, the assessment will consider the emerging (longer-term) benefit impacts and any remedial measures required to ensure the benefits of the scheme remain captured over a longer period. Such measures may include linkages to other proposed transport schemes and projects for the sub-region.

Review and evaluation of the measures being monitored enables the refinement of the benefits realisation approach. This will ensure the continued realisation of impacts as the project progresses. It will also enable lessons learned to be built upon and embedded within the process.

5.3 Evaluating Objective Achievement

The data collated and collected as part of the monitoring exercise, and considered alongside the benefits, will demonstrate the achievement of the objectives, as described in Table 5.2.

Table 5.2: Demonstrating Objective Achievement

Objectives	Analysis to be derived from data collated and collected
To support economic growth , through enhancing the transport links to the Temple Quarter Enterprise Zone (TQEZ) and into and across Bristol city centre, from the Portishead, Bath and Avonmouth and Severn Beach arterial corridors	Enhanced transport links will provide access to the key employment areas, such as TQEZ. Local and regional existing data sets will be used
To deliver a more resilient transport offer , providing more attractive and guaranteed (future-proofed) journey times for commuters, business and residents into and across Bristol, through better utilisation of strategic heavy	Mode choice and more reliable journey times will directly benefit 180,000 people within 1km of 16 existing stations, with enhanced train service frequency. Increased patronage on existing rail corridors will support economic growth across the West of England. The use of different

Objectives	Analysis to be derived from data collated and collected
rail corridors from Portishead, Bath and Avonmouth, and Severn Beach	modes to travel to work will offer more resilience to businesses in the sub-region
To improve accessibility to the rail network with new and reopened rail stations and reduce the cost (generalised cost) of travel for commuters, business and residents	Utilisation of rail for journeys to work, providing those previously without access to key employment areas with the opportunity to find employment. Rail patronage and local/existing data sets will be used will demonstrate the role this scheme has had in improving accessibility to residents and businesses. Accessibility surveys will show how many more people are within 30mins travel time of key employment sites
To make a positive contribution to social well-being , life opportunities and improving quality of life, across the three arterial corridors	Increased accessibility, improved journey times and mode choice will enhance social well-being. The additional travel options provided will also support quality of life and opportunities for work. Social deprivation and levels of crime will support opportunities being offered
To contribute to reducing traffic congestion relative to a 'Do Minimum' scenario (as opposed to current levels of congestion) on the Portishead, Bath and Avonmouth, and Severn Beach arterial corridors	Reduced traffic flows and more reliable journey times on the three corridors will bring benefits across the West of England, even for those not directly benefitting from new train stations or enhanced services
To contribute to enhancing the capacity of the local rail network , in terms of seats per hour in the AM and PM peak	Patronage at new and existing stations will demonstrate how much of the additional capacity (over 600 additional seats) being provided on the rail corridors is being used
To contribute to reducing the overall environmental impact of the transport network , by enhancing the public transport offer, which in turn reduces car dependency	Local air quality and noise improvements will reduce the environmental impact of trips along the corridors. Rail usage surveys will demonstrate how much patronage is increasing on the rail network and hence the opportunity is has provided for people to travel

5.4 Identifying Unintended Impacts

It is recognised that the scheme may have some unintended adverse or positive affects during implementation and operation. Network Rail, the Local Authorities and the Train Operator will be responsible for monitoring the impacts.

Unintended impacts are likely to be identified as a result of data monitoring and feedback from stakeholders and businesses. Any impacts will be recorded in a central database and disseminated to the relevant team members. The monitoring and benefits realisation approach will also be adapted to reflect these impacts, if necessary.

5.5 Economic Evaluation

Following the monitoring, assessment and evaluation undertaken on how the scheme was delivered and the achievement of benefits and objectives, an evaluation will be carried out to assess whether the costs of the scheme have been outweighed by the benefits. This will be undertaken by looking at the evidence collated through the monitoring. The Project team will be responsible for overseeing this.

5.6 Reporting Benefit Realisation and Evaluation

As with the monitoring, reports will be published and reported to the West of England Joint Committee, the Programme Assurance Board and Rail Programme Board. Internal reporting will be provided to the Programme Board and other stakeholders. As required, reports will also be provided to others preparing similar schemes and shared with DfT. The outputs will be shared with the MetroWest Phases team to ensure lessons learned are shared.

Delivery of this Plan

6.1 Introduction

This plan sets out how MetroWest Phase 1 will be monitored, the benefits realised and the evaluation carried out. It is recognised that the processes will evolve as the project progresses, depending on lessons learned. As such, they will be reviewed and updated at the submission of the full businesses case. This section sets out additional elements required for successful delivery.

6.2 Responsibilities

Delivery of monitoring, evaluation and benefit realisation will be managed by the MetroWest Phase 1 project team at North Somerset Council, with support from relevant officers. They will be able to draw on the other teams such as North Somerset Traffic Data Unit as appropriate, but accountability for delivery lies with the team.

6.3 Governance

The West of England Joint Committee, the Programme Assurance Board and Rail Programme Board will ensure the plan is successfully completed in accordance with defined quality assurance processes. The monitoring reports will be reported to the above for endorsement. Once endorsed the report will be placed on the TravelWest website for the public to view.

6.4 Costs

Evaluation costs, covering monitoring and benefits realisation analysis, have been considered. This plan has been developed in a way that minimises the requirements for additional data collection. It has sought to identify monitoring elements that will demonstrate the realisation of various benefits, reducing the amount of work required. The result is a requirement for a mix of qualitative and quantitative data, which will not only demonstrate the benefits of this project, but also feed into the development of future schemes.

By utilising existing and ongoing annual surveys as much as possible, the primary resource requirement will be officer time to collate, analyse and evaluate the outputs to identify the level of benefit the scheme is delivering. There will also be costs associated with accessibility, noise, carbon and air quality modelling. A budget of £75,000 is set to fund this. Funding will be provided by the West of England authorities.

6.5 Risks and Mitigations

Risks and mitigation measures are dealt with at the Rail Programme Board level because of the close inter-relationship between the rail projects. Programme and project SROs and managers will regularly review the risk register and report to the Rail Programme Board. The most significant risks will be reviewed at each board meeting, via the highlight report. A risk owner will be identified who will be the person best able to manage the risk. The Programme SRO will be responsible for approving actions to mitigate risks at the programme level. The Programme Manager will be responsible for quality assurance.

