

**JOINT DECISION OF NORTH SOMERSET COUNCIL AND WEST OF ENGLAND MAYORAL COMBINED AUTHORITY**

**DECISION OF:** NORTH SOMERSET COUNCIL ASSISTANT DIRECTOR NEIGHBOURHOODS AND TRANSPORT AND WEST OF ENGLAND MAYORAL COMBINED AUTHORITY STRATEGIC DIRECTOR OF INFRASTRUCTURE AND STRATEGIC DIRECTOR OF CORPORATE RESOURCES.

**WITH ADVICE FROM:** NORTH SOMERSET COUNCIL HEAD OF TRANSPORT, AND WEST OF ENGLAND MAYORAL COMBINED AUTHORITY HEAD OF INTEGRATED TRANSPORT OPERATIONS

**DECISION NO:** 2023-BSIP-05

**SUBJECT:** BUS SERVICE IMPROVEMENT PLAN (BSIP) MONITORING AND EVALUATION RESOURCE

**DECISION:**

To approve the allocation of £300K from the BSIP funding award to deliver monitoring and evaluation for the BSIP programme, covering the period from 1 April 2023 to 31 March 2025.

**1. BACKGROUND:**

1.1. The Department for Transport (DfT) requires from the Local Transport Authorities (LTAs) that the following requirements are met:

- Complete quarterly BSIP monitoring reports.
- Publish reports every 6 months to show progress against BSIP targets and planned initiatives.
- Review the BSIP annually to ensure it remains up-to-date and can be used by DfT to access allocation of further funding towards bus improvements, without the need to re-bid.
- Review Enhanced Partnership (EP) Scheme(s) periodically, helping to inform EP Board decisions to vary the scheme for better delivery of BSIP outcomes (ongoing beyond BSIP funding).
- Review functioning, successes, and challenges of the EP periodically.

1.2. Delivering reviews and reports requires coordinated input from numerous teams and stakeholders and the ability to present large amounts of data in a meaningful and accessible way. The West of England Mayoral Combined Authority (MCA) and North Somerset Council (NSC) require capacity to:

- Take a leading role in the scoping and production of the reviews/ reports.
- Produce well-written reports and review documents.
- Coordinate input and work with the Project Managers to ensure the appropriate approvals are sought.

1.3. Data used to inform the original BSIP and recent BSIP Progress Report have been focused on reporting against the BSIP targets and is currently collected from operators, national reports and databases managed by Transport Operations officers, with the exception of Passenger Satisfaction data which is supplied through a Transport Focus' Bus Journey Survey that is being delivered across the BSIP area. Future BSIP Progress Reports would benefit from capturing the impact of specific initiatives. Robust evaluation methodologies and monitoring provisions are required for each initiative. Expertise and capacity to set up robust monitoring and evaluation for individual initiatives is therefore required to:

- Identify key performance indicators (KPIs).
- Identify additional data requirements.
- Propose a manageable forward plan for data requests from operators and other sources, considering the limitations of smaller operators to acquiesce.
- Analyse complex datasets.

1.4. Transport Focus is the UK's principal passenger representative organisation, having delivered its well-regarded Passenger Satisfaction survey over many years and refined its approach in 2023 to help meet the need of BSIPs and EPs across the country. The MCA has historically reported passenger satisfaction data from these surveys and therefore continuity will allow for ongoing reporting of comparable data.

1.5. For more information on the BSIP programme, including contextual information, refer to Appendix 1.

## **2. REASONS:**

2.1. Monitoring and evaluation resource is required for the following reasons:

- To agree and put in place a monitoring & evaluation process to support the BSIP & EP DfT-mandated reviews and reporting.
- To make informed decisions on future initiatives, potentially reducing the impact of funding allocations and benefits to passengers.
- To commission the necessary survey required by the BSIP and EP programme.

### 3. OPTIONS CONSIDERED:

3.1. Options considered are outlined in the table below:

	Option	Outcomes	Suggestion
A	Not approve funding and use existing LTA monitoring and evaluation resource	<ul style="list-style-type: none"> <li>• The MCA's Economic Analysis team has limited capacity to support the on-going monitoring and evaluation requirements of the programme.</li> <li>• The MCA's Transport Strategy team is stretched over the coming months because of tightened delivery timelines for the JLTP4.</li> <li>• NSC also has limited capacity to support on-going monitoring and evaluation requirements of the programme.</li> <li>• Monitoring and evaluation activities for the BSIP programme will be light-touch and will not be able to provide full analysis on the impact of the BSIP initiatives.</li> </ul>	Reject the option
B	Approve spend	<ul style="list-style-type: none"> <li>• Approval of the funding will allow focused resource to be brought into the team to support the MCA and NSC with the monitoring and evaluation requirements of the programme.</li> </ul>	Approve the option

### FINANCIAL IMPLICATIONS

#### 4. COSTS:

4.1. The cost for delivering monitoring and evaluation activities for the programme is expected to be £300K across the 3 years. A funding breakdown is shown in the table below.

Item	Cost (£)
Passenger satisfaction survey	70,000
Monitoring and evaluation consultant	150,000
Survey software costs	6,000
Contingency	74,000
<b>Total</b>	<b>300,000</b>

## 5. FUNDING:

5.1. Work to be completed against the £300K budget agreed with DfT for monitoring and evaluation.

## 6. LEGAL POWERS AND IMPLICATIONS:

6.1. There are no legal implications arising from this report.

## 7. CLIMATE CHANGE AND ENVIRONMENTAL IMPLICATIONS:

7.1. The West of England Climate and Ecological Strategy and Action Plan has three priority environmental themes: nature recovery, climate resilience and net zero carbon by 2030.

7.2. The MCA is reflecting these environmental priorities in the Infrastructure portfolio by requiring (with some exceptions) carbon management plans and carbon accounting, Environmental impact assessments (or non-statutory equivalents), Biodiversity net gain (BNG) assessments and delivery of at least 10% BNG, as well as climate risk assessments.

7.3. The Monitoring and Evaluation plan needs to consider these within its scope, budget and in line with organisational reporting requirements.

## 8. CONSULTATION:

8.1. This work package was presented to BSIP Programme Board on 25 October 2023.

## 9. RISK MANAGEMENT:

9.1. Risks associated with the project are outlined in the table below:

	<b>Risks</b>	<b>Mitigations</b>
1	DfT mandated reports and reviews will not be deliverable to the timescales and quality required without additional and expert resource.	Bring in focused resource to support with the monitoring and evaluation requirements of the programme.
2	Without robust evaluation of delivered initiatives, the MCA and NSC will be unable to make informed decisions on future initiatives, potentially reducing the impact of funding allocations and benefits to passengers.	Bring in focused resource to support with the monitoring and evaluation requirements of the programme.

## 10. EQUALITY IMPLICATIONS:

10.1. Undertaking monitoring and evaluation in an effective manner will have a positive impact on equalities in general and user groups with protected characteristics.

10.2. Any Equality Impact Assessments that have been undertaken BSIP initiatives will be a material consideration when planning monitoring and evaluation activity.

## **11. COMMERCIAL AND PROCUREMENT IMPLICATIONS:**

- 11.1. The utilisation of an effective monitoring and evaluation team provides confidence to stakeholders, public and the DfT that the requirements of the funds have been utilised as required.
- 11.2. The monitoring and evaluation resource can lead to cost savings by identifying and eliminating inefficiencies and redundant processes, ensuring effective contract management, and fostering strong commercial relationships.

### **SIGNATORIES:**

#### **DECISION MAKER(S):**

**Signed: Gemma Dando, Assistant Director, Neighbourhoods & Transport, North Somerset Council**  
**Date: 21/12/2023**

**Signed: David Gibson Strategic Director of Infrastructure, West of England Mayoral Combined Authority**  
**Date: 15/12/2023**

**Signed: Rachel Musson, Strategic Director of Corporate Resources, West of England Mayoral Combined Authority**  
**Date: 13/12/2023**