

Tiverton EUE Access

Draft Benefits Realisation Plan and Monitoring and Evaluation Plan

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Devon County Council
County Hall
Topsham Road
Exeter
Devon
EX2 4QD



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1 Scheme Background and Context

1.1 Description of the Scheme

1.1.1 The project will deliver a new junction onto the A361 to the east of Tiverton to access the proposed Tiverton Eastern Urban Extension development. The junction will be a full movements, grade separated junction, with slip roads on both sides of the road, connected by a bridge.

1.1.2 Current projects costs are as follows:

- Surveys	£50,000
- Diversion/Protection of Utilities	£400,000
- Design	£500,000
- Works	£12,950,000
- Supervision/Contract administration	£500,000
- Archaeology, investigations and watching brief	£100,000
- Part 1 claims	£500,000
Total	£15,000,000

1.2 Document Purpose

1.2.1 This document serves two key purposes, setting out both a draft 'Benefits Realisation Plan' and a draft 'Monitoring and Evaluation Plan' for the Tiverton EUE Access scheme.

1.2.2 The Benefits Realisation Plan identifies the potential benefits of the scheme and the way in which these benefits will be planned for, tracked and realised through scheme implementation.

1.2.3 The Monitoring and Evaluation Plan identifies more broadly how actual scheme delivery, including wider scheme impacts, construction and budget management, are to be evaluated.

1.2.4 This is a working document, submitted in draft form alongside the main scheme application which will be updated as the scheme is implemented. The document will be kept under review throughout scheme implementation.

1.2.5 This document relates only to scheme implementation, following the decision in principle to allocate funds by the Local Transport Board, anticipated in December 2014.

2 Benefits Realisation Plan

2.1 Scope of the Plan

- 2.1.1 The Benefits Realisation Plan is designed to enable benefits that are expected to be derived from the scheme to be planned for, tracked and realised.
- 2.1.2 The expected benefits are identified and the plan also details the key activities that are required to manage the successful realisation of these benefits. The scheme objectives will be summarised, measurement methods and data requirements will be outlined, and the resources and responsibilities required to assess the delivery of the benefits will be defined.
- 2.1.3 This section of the document:
- Summarises the scheme objectives and associated expected outcomes;
 - Outlines the benefit measurement methods and associated data requirements; and
 - Outlines responsibilities and resources required to oversee the Plan.

2.2 Expected Benefits

- 2.2.1 The Tiverton EUE Access scheme objectives have been used to develop the outputs and expected benefits for the scheme. The outputs and benefits are those expected to be derived from the scheme and are directly linked to the original set of objectives:
- Outputs – tangible effects that are funded and produced directly as a result of the scheme; and/or
 - Outcomes – final impacts brought about by the scheme in the short, medium and long term.
- 2.2.2 The scheme objectives, outputs and expected benefits are summarised in Table 1 and provide the starting point for the development of the Benefits Realisation Plan.

Scheme Objective		Outputs	Outcomes
1	Deliver sustainable development at the EUE site	Improve access to Tiverton EUE development and remove traffic from Blundell's Road and through Halberton	Completion of EUE development delivering lasting economic benefits to the area
2	Minimise impact on the environment and in particular Blundell's School and Halberton		Accommodate development traffic on local network
3	Minimise impact on A361		Maintain journey time reliability along Blundell's Road

Table 1 Scheme Objectives, Outputs and Outcomes

2.3 Benefit Measurement Methods

2.3.1 To determine whether the scheme benefits are being realised the expected benefits have been converted into measurable indicators of scheme benefits, as set out in Table 2 below. The data required to measure the extent to which benefits are being realised are also shown.

2.3.2 Benefits have been classified as 'quantitative (Qn)' or 'qualitative (QI)'. Quantitative benefits are those which can be measured in terms of specific numerical values on a continuous scale, whether in absolute or percentage terms, whereas qualitative benefits are measured in category-based or descriptive terms.

Ref	Benefit	Benefit Indicator	Target	Type	Specific Data Requirements	Owner
Outputs						
1	Improved access to Tiverton EUE development	Number of vehicles using new A361 junction	Additional junction onto A361	Qn	None	Transport Planning
Outcomes						
2	Completion of housing and employment development delivering lasting economic benefits to the area	Contribute towards achieving Local Plan development	Up to 40,000m ² employment and 1550 dwellings by 2026	Qn	Housing completions	Transport Planning
3	Maintain current journey times on Blundell's Road, through Halberton and on the A361	Traffic flows and journey times on specified corridors	To be determined	QI/Qn	Traffic flows and journey time surveys (pre and post opening)	Transport Planning

Table 2: Benefits Measurement Methods

2.4 Baseline Data Requirements

2.4.1 Baseline data collection, which will allow the pre-scheme opening situation to be quantified, is required for benefit assessment indicator three. Journey time data will be collected along Blundell's Road, through Halberton and on the A361 prior to construction commencing. It is anticipated that readily available journey time and other information such as Strat-e-gis would be used to avoid the need for specific additional surveys.

2.5 Responsibilities and Resources

2.5.1 Data collection and preparation of the report will be undertaken in-house by Devon County Council Transport Planning officers.

3 Monitoring and Evaluation Plan

3.1 Introduction

- 3.1.1 The purpose of the Monitoring and Evaluation Plan (MEP) is to identify how actual scheme delivery, including wider scheme impacts, construction and budget management, are to be evaluated. The Monitoring and Evaluation Plan therefore has a wider remit than the Benefits Realisation Plan. The Monitoring and Evaluation Plan will culminate with a Post – Implementation Review one and five years after scheme opening.
- 3.1.2 This section of the document identifies the data collection requirements beyond those identified for the Benefits Realisation Plan and sets out the content of the Post-Implementation Review.

3.2 Scheme Implementation

- 3.2.1 The first part of the Post-Implementation Review will focus on scheme delivery, covering the following aspects:
- Construction – including the efficiency and cost of the infrastructure contractor procurement exercise, and the extent to which the construction programme was delivered within the estimated timescales and budget; and
 - Project Management – including the cost of project management resources, as well as the extent to which overall scheme timescales were adhered.
- 3.2.2 This review will be completed approximately one year following scheme opening. A key output of the review will be the lessons learnt log, which will assist in planning and delivering future schemes.
- 3.2.3 To ensure that an accurate and informative Post-Implementation Review can be undertaken, the Project Manager will maintain records in relation to procurement processes, the scheme budget and expenditure and project management meetings.

3.3 Wider Impacts

- 3.3.1 The second part of the Post-Implementation Review will focus on the wider set of impacts, whether positive or negative, as a result of the scheme:
- Scheme benefits – a summary of the formal benefits review, one and five year post scheme completion; and
 - Unexpected (dis)benefits – identifying any additional impacts that were not planned for as part of the Tiverton EUE Access scheme.

3.4 Data Requirements

- 3.4.1 The data required within the Monitoring and Evaluation Plans have been summarised in table 3 below.

Measures	Data to be used	Rationale for inclusion	Data collection methods	Frequency of data collection
Scheme build	Progress against milestones	Determine if planned inputs are delivered	Works monitoring	Monthly reporting during delivery
Delivered scheme	Description of the delivered scheme including quantities	Accountability	Observation of scheme outputs	Post opening
Costs	Outturn scheme costs and maintenance costs	Accountability	Financial monitoring system and LTP maintenance programme	Monthly reporting during delivery and annually
Scheme objectives	Planning completions; Economic activity; Traffic flows; Journey times	Accountability	Planning completions; Employment numbers; ATC; Bluetooth surveys	Pre scheme and 1 and 5 years post completion
Travel demand	Traffic flows	Accountability / knowledge	ATC's and manual surveys	Pre scheme and 1 and 5 years post completion
Travel times and reliability	Journey times	Accountability / knowledge	Bluetooth journey survey	Pre scheme and 1 and 5 years post completion
Impact on the economy	Journey times; Economic activity data	Accountability / knowledge	Bluetooth journey surveys; Employment numbers; GVA	Pre scheme and 1 and 5 years post completion
Carbon	Traffic volume and speeds; Vehicle classifications	Accountability/ knowledge	DfT carbon tool	Pre scheme and 1 and 5 years post completion
Accidents	Accident data	Accountability/ knowledge	Accident analysis data	Pre scheme and 5 years after opening

Table 3 Data Requirements

3.5 Responsibilities and Resources

3.5.1 Data collection and preparation of the report will be undertaken in-house by Devon County Council Transport Planning officers.

4 Delivery Schedule

4.1.1 Benefit realisation and monitoring and evaluation will be an ongoing process throughout the implementation of the scheme and will continue once the Tiverton EUE Access scheme has been delivered. The draft delivery schedule for this work is identified in table 4 below.

Task	Timescale
Pre-construction	
Draft Benefits and Realisation Plan and Monitoring and Evaluation Plan	October 2014
Finalise plans	December 2014
Baseline data collection	as appropriate
During Construction	
Scheme delivery and project management data collection for MEP	as appropriate
Post Construction	
Benefits Realisation Plan data collection	as appropriate
Formal benefits review	One year post opening
Post-Implementation review	One year and five year post opening

Table 4: Draft Delivery Schedule