

**Report to the  
Transport for South Hampshire and Isle of Wight  
Joint Committee**

**Date:** 7 June 2013  
**Report by:** John Rider  
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**Subject:** Local Sustainable Transport Fund Progress Update

**Purpose of the Report**

To update Members on progress in delivering the large Local Sustainable Transport Fund (LSTF) funded project A Better Connected South Hampshire. The report builds on updates provided at previous Joint Committee meetings.

**Recommendations**

- (a) That progress on the Local Sustainable Transport Fund programme is noted and future work supported.**
- (b) That Members fully endorse the need to maintain the focus on programme delivery. This includes supporting the need to fill vacancies promptly and ensuring necessary resources are procured to support scheme development and implementation.**

**Introduction**

- 1. Since the last update in February, progress has been made across all the key delivery areas:
  - (a) scheme delivery;
  - (b) marketing and communications;
  - (c) monitoring and evaluation; and
  - (d) budget and finance;

## **Scheme Delivery**

2. Delivery highlights since the last meeting include the following:
  - (a) continued roll-out of Real Time Information across Southampton and South Hampshire;
  - (b) implementation of bus priority on Bournemouth Road in Chandler's Ford;
  - (c) 44 signal junctions in Southampton being equipped to facilitate bus priority;
  - (d) over £100,000 in support for schools and colleges to deliver and monitor travel plans across Transport for South Hampshire and Isle of Wight (TfSHIoW);
  - (e) £95,000 to deliver Personal Journey Planning in Gosport and Millbrook and £60,000 for travel plan support in workplaces and travel plan networks across Transport for South Hampshire (TfSH);
  - (f) preliminary research to design mapping for the implementation of pedestrian wayfinding across South Hampshire and further roll-out across Southampton;
  - (g) initiation of joint procurement of back office smart ticketing and legible cities projects.

## **Marketing and Communications**

3. Since the last meeting, the marketing strategy has focused on the following areas:
  - (a) a teaser general awareness campaign using the strap line "The Travel Revolution Has Begun!" commenced in January 2013 initially in the Southampton area and is currently still running in the Portsmouth area;
  - (b) the teaser campaign developed further with more specific messages such as "Try a new route on your commute" to promote My Journey and drive traffic to the My Journey website. This consisted of a multi channel campaign consisting of out of home media, direct mail, radio competitions, events, press advertising and PR. The campaign has run across the entire TfSH area and continues to run into May. Currently we have over 9,000 hits to our website and awareness levels are proving to be high;
  - (c) development of the multi-modal journey planner. This is a crucial component of the My Journey website featuring both an online and mobile journey planning facility covering all modes. The intention is to launch the journey planner in early summer;
  - (d) developing a coordinated marketing strategy for 13/14 and 14/15. The strategy will be delivered through collaborative

working across Portsmouth City Council, Hampshire County Council and Southampton City Council, other LSTF projects, partners and stakeholders. The Isle of Wight is yet to decide if they are to adopt the My Journey brand. Strategy objectives include:

- (i) achieve 15% My Journey brand awareness amongst car owners in South Hampshire;
  - (ii) promote the use of the mobile friendly journey planner and recruit volunteer community advocates;
  - (iii) engage the South Hampshire population to pledge 10,000 non car journeys;
  - (iv) achieve 5% behaviour change by integrating marketing activity with work stream delivery.
4. Initial feedback on the general awareness campaign in Southampton has been very positive. Preliminary data being evaluated by Southampton City Council puts awareness of the My Journey brand at around 36% in Southampton. This compares favourably with a comparable campaign in Sutton conducted as part of the smarter Choice Sutton project in 2007 which achieved a 29% brand awareness in the first year of the campaign. A more detailed update will be provided at the meeting.
  5. A provisional timeline for 2013/14 marketing activity is set out below:
    - General Awareness Campaign – up to May 2013;
    - Launch of 'My Journey' Journey Planner – June 2013;
    - Launch of Pledge campaign – Autumn 2013;
    - Development of 'People like Me' campaign – late Autumn 2013;
    - Recruitment of community advocates – from Summer 2013;
    - Sponsorship and participation in related events such as Southampton Sky Ride, the Lord Mayor's cycle ride in Portsmouth.

### **Monitoring and Evaluation**

6. Officers continue to work with the University of Southampton to prepare a high level monitoring and evaluation programme designed to measure the impacts of both the overall programme as well as specific components. Feedback from the Department for Transport (DfT) on the draft monitoring plan has been positive.
7. Following feedback from DfT on the initial report and subsequent modifications to the proposed methodology a Baseline Report is now anticipated by the end of June. A full presentation will be made at the next meeting.

## Budget and Finance

8. 2012/13 outturn spend is presented in Table 1 below. Overall, TfSH spent £1.95 million capital and £1.02 million revenue against allocations of £1.81 million and £0.9 million respectively. 2013/14 budgets will be adjusted to reflect the overspend.

**Table 1: 2012/13 Outturn Expenditure**

	Capital			Total	Allocation	Variance
	Q2	Q3	Q4			
HCC	£ 87,514	£ 56,892	£ 837,325	£ 981,731	£ 994,600	-£ 12,869
PCC	£ -	£ 17,111	£ 196,320	£ 213,431	£ 208,000	£ 5,431
SCC	£ -	£ 260,453	£ 497,257	£ 757,710	£ 610,400	£ 147,310
	£ 87,514	£ 334,457	£ 1,530,902	£ 1,952,873	£ 1,813,000	£ 139,873

	Revenue			Total	Allocation	Variance
	Q2	Q3	Q4			
HCC	£ 31,156	£ 163,503	£ 252,965	£ 447,624	£ 388,000	£ 59,624
PCC	£ -	£ 4,516	£ 103,817	£ 108,333	£ 65,138	£ 43,195
SCC	£ -	£ 16,563	£ 447,784	£ 464,347	£ 455,938	£ 8,409
	£ 31,156	£ 184,581	£ 804,566	£ 1,020,303	£ 909,076	£ 111,227

9. Provisional budgets for 2013/14 and 2014/15 are presented in Table 2.

**Table 2 : Provisional budgets for 2013/14 and 2014/15**

	2013/14		2014/15	
	Capital	Revenue	Capital	Revenue
HCC	£ 1,330,650	£ 1,220,582	£ 822,416	£ 747,767
PCC	£ 334,976	£ 595,999	£ 877,611	£ 535,504
SCC	£ 3,832,493	£ 1,319,524	£ 2,602,669	£ 644,840
	£ 5,498,119	£ 3,136,105	£ 4,302,696	£ 1,928,111

10. DfT recently issued advice on changes to the funding arrangements for LSTF grant in 2013/14 and 2014/15. The full letter is attached as Appendix A to this report. Put simply:
- TfSH grant for 2013/14 will be paid in four equal payments in arrears (28 August 2013, 25 November 2013, 28 February 2014, 25 May 2014), based on the annual allocations as previously advised;
  - a spend profile for 2013/14 needs to be submitted by 26 July setting out how we intend spending our 2013/14 grant;
  - a claim form needs to be submitted at the end of the year (by 28 April 2014) setting out actual spend;
  - any unused 2013/14 funds can be held over until 2014/15 (advising DfT how much and why we are holding money over);

- (e) the same process will apply for 2014/15 apart from the final payment which will be released once we show actual final spend in 2015. Any unspent funds at the end of 2014/15 will be lost;
  - (f) the Department will be carrying out a series of spot checks during 2013/14 to check progress. These will include site visits, and evidence that the project is being delivered according to good practice standards for project and financial management.
11. Whilst the greater flexibility and freedom will be beneficial in terms of more efficient delivery and less bureaucracy, given the significantly increased budgets available in 2013/14 and 2014/15 it remains important that authorities continue to focus on delivery in order not to risk losing any of the grant at the end of the period.
  12. In that respect it is important that vacancies affecting LSTF delivery are filled promptly and necessary resources are procured to support and enable scheme delivery.

Section 100 D - Local Government Act 1972 - background papers

**The following documents disclose facts or matters on which this report, or an important part of it, is based and has been relied upon to a material extent in the preparation of this report.**

NB the list excludes:

1. Published works.
2. Documents which disclose exempt or confidential information as defined in the Act.

TITLE	LOCATION
A Better Connected South Hampshire – Bid to DfT Executive Summary Volume 1 – The 5 Business Cases	<a href="#">Transport for South Hampshire: meetings, documents and publications</a>
Volume 2 – Appendices	Hard copy to borrow available on request

## Appendix 1 – DfT correspondence 2<sup>nd</sup> April



Transport for South Hampshire  
'A Better Connected South Hampshire: Supporting  
Growth, Reducing Carbon, Improving Health'  
By email

Graham Pendlebury  
Director of Local Transport  
Department for Transport  
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London  
SW1P 4DR  
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Email: [lstf@dft.gsi.gov.uk](mailto:lstf@dft.gsi.gov.uk)  
Web Site: [www.gov.uk/dft](http://www.gov.uk/dft)

2 April 2013

Dear Mr Rider,

### **Local Sustainable Transport Fund (LSTF) Grant Award for Financial Year 2013/14**

Grant funding arrangements for the remainder of the Fund timeframe have been reviewed, and some changes are being introduced for this new financial year, as set out below. Proposed changes for the final year of the Fund (2014/15) are also described, but will be confirmed through a grant award letter at the start of the 2014/15 financial year.

These changes are intended to simplify financial management processes surrounding year end for continuous projects which span 3-4 years. Since your project is now mid-implementation and no significant project delays have been reported, the Department is providing Transport for South Hampshire with greater financial flexibility. It is expected that this will enable your project team to prioritise the most effective methods for delivery, to achieve the expected outputs and the desired outcomes, as set out in your successful bid documentation.

Your 2013/14 grant will be paid in four equal quarterly payments on each quarterly payment date (28 August 2013, 25 November 2013, 28 February 2014 and 28 May 2014). You will be required to submit a claim form by 26 July 2013 (the Q1 deadline) which will set out how you plan to commit your **total** 2013/14 allocation, before these payments can be authorised.

We will then require from you a claim form by the Q4 deadline (28 April 2014), setting out your actual spend from 2013/14. Any unspent funds can be held over by yourselves into 2014/15, in which case we will require a summary of how much you are holding over, and the reasons for programme delays. This summary must accompany your claim form on 28 April 2014 (the Department will issue a template nearer the time).

Assuming you do not encounter serious delivery challenges during 2013/14, 75% of your 2014/15 grant will then be paid in three equal payments on the Q1, Q2 and Q3 payment dates in 2014/15, following receipt of a claim form in July 2014, setting out how you plan to commit your 2014/15 allocation in full (excluding any funds carried over from 2013/14). After the project is completed, we will require from you a claim form on the Q4 deadline in April 2015, setting out your actual spend for 2014/15 (excluding any amounts you have held over from your 2013/14 payments). This claim form will trigger payment of your remaining 25% of grant, assuming successful completion of your LSTF project. Any

unspent funds from 2014/15 cannot be carried into 2015/16 and therefore unspent amounts will be deducted from the final 25% payment.

If your project encounters serious delivery challenges during 2013/14, the Department reserves the right to revert to quarterly claims in arrears for your project in 2014/15.

To ensure projects continue to achieve the objectives of the Fund, the Department will conduct a series of 'spot check' visits during 2013/14 and 2014/15. The LSTF team will contact you directly if your project is selected for a spot check. During such a visit, you will be invited to organise appropriate site visit(s) to show how funds have been invested, and you will be expected to demonstrate that your project is being delivered according to good practice standards for project and financial management. Evidence of internal reporting mechanisms for financial and risk management will therefore also be sought.

It is essential that the Department maintains an overview of project delivery. Therefore your cooperation in completing the annual outputs report before the agreed deadline is required. Delays in completing this report may lead to delays in your first quarterly payment. The annual outputs reporting process is launched in May each year, with a completion deadline in July. If your project is also participating in any case studies or outcomes monitoring, your timely cooperation with these work-streams is also expected. To find out more about monitoring and evaluation expectations for your project, please refer to the Monitoring and Evaluation Framework at:

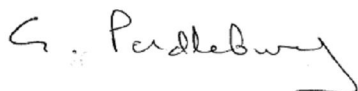
<https://www.gov.uk/government/publications/local-sustainable-transport-fund-monitoring-and-evaluation-framework>

You are also encouraged to submit progress reports to the LSTF Knowledge Hub – this will enable you to share good practice with other project teams, and also helps the Department to identify opportunities for potential Ministerial visits. Many project teams have already hosted a Ministerial visit, and many more will take place during 2013/14 and 2014/15. Your cooperation in planning and participating in relevant Ministerial visits is appreciated.

You will receive your formal grant determination from the Department in May/June 2013 setting out the terms under which the Secretary of State for Transport is prepared to award grant under Section 31 of the Local Government Act 2003 to Transport for South Hampshire for the Fund. This will include your allocation for 2013/14 with details of your four equal scheduled payments, and any remaining allocation for 2014/15.

The information contained in this letter should be brought to the attention of all relevant staff in your authority. Should you wish to discuss the contents of this letter, please contact the LSTF team on 020 7944 6943 or via e-mail: [lstf@dft.gsi.gov.uk](mailto:lstf@dft.gsi.gov.uk).

Yours sincerely,



Graham Pendlebury