

**WEST MIDLANDS PLANNING & TRANSPORTATION SUB-COMMITTEE**

5<sup>th</sup> June 2009

**SMART ROUTES (UMBRELLA INITIATIVES)**

**Report of Chief Engineers and Planning Officers Group**

**1. PURPOSE OF REPORT**

- 1.1. To report on the outcome of the 'Umbrella Initiatives' workshop held with members of Planning & Transportation Monitoring Group (P&T SC) and the Passenger Transport Authority (PTA) on 3 December 2008 and to highlight further work being undertaken on the initiative under the branding of 'Smart Routes'.

**2. RECOMMENDATIONS**

- 2.1. That the Sub Committee:

- (i) Note the outcomes of the 'Umbrella Initiatives' workshop undertaken with P&TSC and PTA members on 3<sup>rd</sup> December 2008
- (ii) Endorse that further work be undertaken on the initiative under the brand name of 'Smart Routes'
- (iii) Agree that the 'Smart Routes' principles should be adopted in developing a potential network of Red Routes for inclusion in a Major Scheme Business Case (MSBC) for submission to the Department for Transport (DfT)
- (iv) Note the selection of the A41 Warwick Road as a Pilot Route
- (v) Note that a similar report was submitted to a meeting of the Integrated Transport Authority (ITA) on 20<sup>th</sup> April 2009

**3. BACKGROUND**

- 3.1. Recent discussions with the Department for Transport (DfT) have identified a need to focus ever more closely on the delivery of transport schemes across the West Midlands both in terms of outputs and outcomes.
- 3.2. In parallel, the resources available need to be carefully channelled into delivering LTP targets through collaborative working between partner authorities. Much is already being done within the scope of the existing governance arrangements approved by P&TSC in 2008 to coordinate the development and implementation of key network wide programmes, particularly Bus Showcase and Red Routes
- 3.3. There has for some time been regular monthly liaison between the Bus Showcase and Red Route programme managers as well as joint meetings of the respective delivery teams at appropriate times. The measures implemented on the A34 Walsall Road between Birmingham and Walsall are a good example of what can be achieved with a coordinated approach. This corridor scheme has required close cooperation between all partners, namely Birmingham City Council, Sandwell MBC, Walsall MBC, Centro and National Express.

- 3.4. More recently, the scope for closer integration with other network-wide initiatives, such as the UTC Major Scheme, Congestion Target Monitoring and Bus Partnership Routes has been identified, and is being actively pursued. There is a substantial degree of overlap between the various routes that have been identified for individual initiatives, in some cases involving all of the programme workstreams. The advantages of more coordinated development and implementation of schemes for these routes will help to overcome potential conflicts in terms of the individual objectives.
- 3.5. The adoption of the 'Smart Routes' principle for these network-wide initiatives will address the above issues and build on the coordination that has already been established. In addition, it will provide the opportunity to create a consistent branding and communication strategy in line with 'Network West Midlands' and Centro's Bus Vision 'Transforming Bus Travel'. This also links well with the development of 'Smarter Choices' following adoption of the 3-point plan where the emphasis is on maximising the impact of all transport infrastructure improvements and, therefore, value for money.
- 3.6. It is against this background that the P&T Monitoring Group, at its meeting on 24<sup>th</sup> September 2008, resolved to hold a member's workshop in response to the 'Lessons Learned' exercise and scrutiny review undertaken for the Red Route initiative. This followed on from the earlier Bus Showcase Strategic Review exercise, where a key recommendation was the need to adopt a 'whole-route' approach in the future development of Showcase schemes. Members from the PTA were invited to attend the workshop in view of the joint responsibilities and overlap. The workshop explored the issues and ways forward for the future development of network wide-initiatives which promoted closer integration under an 'Umbrella' principle.

#### 4. **REPORT DETAILS**

##### **'Umbrella Initiatives' (Smart Routes) Workshop**

- 4.1. The workshop involving both P&TSC and PTA members was held on 3<sup>rd</sup> December 2008, its purpose being to review Red Routes, Bus Showcase and other network wide initiatives, their objectives and how they interconnect.
- 4.2. Against the background of a desire to enhance delivery through better integration of schemes, the focus of the workshop was in three parts as follows:
  - Members were initially provided with a brief presentation of the key initiatives and the principles of improved delivery that would be possible through adoption of the 'Smart Routes' approach. These are discussed in more detail in paragraphs 4.5 to 4.8 below.
  - The second part of the workshop looked at identifying the barriers to delivery, including political, financial, resources, communications and technical
  - The third and concluding part of the workshop pulled together the lists of the barriers from each of the groups to produce an overall summary and aligned these with the previously identified key principles

- 4.3. The overall conclusion from the workshop was that many of the identified barriers could potentially be addressed in a positive way by one or more of the key principles of 'Smart Routes'.
- 4.4. A workshop has also been held with P&TSC members in January 2009 on Smarter Travel Choices, which is one of elements of the 3 Point Plan. The proposed strategy for a range of corridor-based demonstration projects will build on the existing activity already undertaken in the West Midlands by Travel Planning and Sustainable Travel Officers in Local Authorities and Centro. Given that there are synergies between this and the Smart Routes work, opportunities to develop Smart Travel Choice corridors with the Smart Routes are currently being explored.

### **Key Principles of 'Smart Routes'**

- 4.5. The Members' workshop identified six key principles of 'Smart Routes' all of which build on the experience gained from work already undertaken on Joint Initiatives, particularly Bus Showcase and Red Routes. These six principles relate to:
- Greater integration of design and delivery
  - Improved governance and ownership (both at political and officer level)
  - The need for 'corridor' based project teams
  - The need for integrated communications
  - Improved collaborative working for both design and implementation
  - Improved utilisation of resources (both financial and staffing)
- 4.6. From work undertaken on current initiatives, most notably Bus Showcase and Red Routes, it is clear that there are varying degrees of integration possible between individual programmes, this being dependant upon the objectives and characteristics of each particular route. It is also apparent that one design solution cannot be applied to solve every problem identified. The Red Route 'Lessons Learned' exercise emphasised the importance of recognising the need for local variations in design approach and this will be reflected in the revised 'Guidelines for Implementation' being prepared for both Red Routes and Bus Showcase.
- 4.7. As a result, it is important that a flexible approach is adopted where initiatives are taken forward in the most appropriate combination to address the agreed strategy for the route / corridor. In some cases, this would result in schemes being progressed as individual initiatives whilst elsewhere a full 'Smart Routes' approach may be desirable. Such decisions will be influenced by the need to maintain the delivery of schemes that are already contained in the LTP programme. However, in principle and as outlined in Transforming Bus Travel, the new approach will effectively mean that authorities have an enlarged tool-kit available to meet the requirements identified.
- 4.8. Traditionally, the governance and management of initiatives has been driven by their respective funding sources, although the setting up of the Joint Initiatives Management Board and increased responsibilities of the P&T

Monitoring Group last year has enabled closer monitoring and integration. The 'Smart Routes' approach will allow schemes to be developed in a more integrated way such that the primary driver will in future be the delivery of the agreed targets and strategy for the route/corridor. In the short term, this is likely to raise issues of potential disparities between funding streams, which will need to be addressed. The long-term aim will be for the adoption of more coherent funding arrangements that are aligned with the emerging strategic / route objectives, where it is deemed that the 'Smart Routes' approach is the most appropriate way forward.

#### **Pilot Route: A41 Warwick Road**

- 4.9. Whilst closer integration between initiatives has been encouraged and developed over the past few years, it is likely that 'Smart Routes' will require a significant change to the way in which schemes of this nature are developed and funded. As a result, it was felt necessary to select a pilot project that can be progressed as a 'Smart Route' in order to produce a set of guidelines for the future development of the network.
- 4.10. Discussions have taken place with district partners at the Bus Showcase and Red Route Programme Delivery Team meetings with a view to the selection of an appropriate route to take forward as a pilot and the A41 Warwick Road in Birmingham and Solihull has been chosen. As well as being a 'Whole-Route' Bus Showcase initiative, it has also been identified for possible inclusion in the Red Routes Package 2 network and as a Bus Partnership Route in cooperation with National Express.
- 4.11. A project team led by Birmingham City Council has already been established to take the scheme forward and governance arrangements have been put in place to include a project board to oversee the process. An outline structure or process chart for managing the development and implementation of a route strategy has been agreed by the team and is attached to this report at Appendix A. Discussions are ongoing to agree the scope and content of the initial stage culminating in the establishment of a Route Strategy, which would be used to guide the further development of the scheme.
- 4.12. The process has been divided up into three principle stages, with inputs and outputs clearly defined including potential stakeholder, public and member engagement at various times. Workshops are currently being planned for members in early June. The whole process will need to be aligned to existing processes and approval procedures adopted by individual partner authorities (similar discussions are currently taking place with regard to Bus Showcase schemes).
- 4.13. It is also recommended that the principles of 'Link & Place' should be incorporated into the process at locations where there are likely to be significant issues to address. This initiative stresses the need to consider each street in its wider urban context, as both a movement channel forming part of the road network (i.e. a Link) and as Place in its own right. Design solutions should be influenced by both Link and Place user needs, and solutions will vary according to the balance of significance of these two at any location. This will build on the consultation work undertaken by Coventry City Council and Walsall MBC in the Ball Hill and Bloxwich areas respectively.

## **Other Smart Route Initiatives**

- 4.14. In developing the 'Smart Routes' approach, the opportunity has been taken to review similar initiatives being pursued elsewhere in the UK. Of particular interest is the approach adopted by Merseytravel through its 'Integrated Corridor Management' which focuses on the involvement of its Travelwise team throughout the design process (reference is made to this in the Merseyside LTP). In addition, the work undertaken by Transport for London (TfL) in the development of its Network Management Plans has been a useful guide in terms of the key principles of the process.
- 4.15. Research is continuing with regard to identifying best practice elsewhere and exchanges have occurred with the Dublin authorities in Ireland. The success of Dublin's Quality Bus Corridor schemes is of particular interest in terms of the amount of bus priority and associated passenger increases in some of their key corridors. An officer visit to Cowley Road in Oxford took place in March to review the work being undertaken using the principles of 'Mixed Priority Routes'.
- 4.16. It is suggested that consideration be given to organising a joint visit for Members and officers to review and discuss best practice in at least one of the locations identified above. Initial enquiries have suggested that a visit to Dublin would be welcomed by the relevant authorities combined with an invitation for Merseytravel officers to participate. The content and timing of such a visit would need to be carefully coordinated and further thought will be given to this.

## **Smart Routes: Future Management and Governance**

- 4.17. From the work undertaken so far, a more integrated approach to the development and implementation of route-based initiatives using the principles of 'Smart Routes' has clear advantages in terms of improved delivery and value for money. This has been reinforced by the recent scrutiny review of Red Routes and the associated 'Lessons Learned' exercise, together with the previously undertaken Bus Showcase Strategic Review.
- 4.18. Nevertheless, there is a need to monitor this new approach and the work that has started on the A41 Warwick Road pilot scheme will help to inform the development in more detail of the principles already established. The preliminary details of the programme, timescale and resource requirements will need to be reviewed in light of this and thereafter regularly monitored.
- 4.19. Whilst the setting up of the CEPOG Joint Initiatives Management Board and P&TSC Monitoring Group has enabled closer monitoring and control of network wide programmes it has not, in itself, encouraged an integrated route approach. Accordingly it is proposed to focus on the 'Smart Routes' approach by the creation of a 'Smart Routes' Co-ordination Group (SRCG) that will allow schemes to be developed in a more integrated way, such that the primary driver will in future be the delivery of the agreed strategy for the route / corridor.

- 4.20. It is proposed that the SRCG will coordinate policy aspects associated with the various programmes namely Bus Showcase, Red Routes, the UTC Major Scheme and Congestion Target Delivery Fund. The current Programme Delivery Teams will continue to focus on the delivery of their respective schemes but increasingly this will be under the direction of the SRCG.
- 4.21. The long-term aim will be for the adoption of more coherent funding arrangements that are aligned with the emerging strategic / route objectives, where it is deemed that the 'Smart Routes' approach is the most appropriate way forward.
- 4.22. The project management and governance arrangements for 'Smart Routes' will need to build on rather than duplicate the roles and responsibilities of the existing Joint Initiatives Management Board and P&T Monitoring Group. Given the overlap between the various initiatives there will also be a requirement to ensure that full consultation with the existing management teams occurs, particularly the Bus Showcase and Red Route Programme Delivery Teams.
- 4.23. There is also a need to develop a communications strategy that aligns 'Smart Routes' with the 'Network West Midlands' initiative.

### **Red Routes: Further Network Development**

- 4.24. Following inclusion in the recent RFA submission, work is progressing with District partners on the development of a network of routes for Package 2 of the Red Route initiative, which will lead to the submission of a Major Scheme Business Case (MSBC) to the Department for Transport (DfT). From the work undertaken to date, it is apparent that there are clear advantages in developing the routes using the principles of 'Smart Routes' which are, therefore, being adopted. However, in taking into account 'Smart Route' principles the preparation process will need to be carefully managed to reduce the risk of delaying the submission of the MSBC. There is a separate report on this agenda covering the development of Package 2 in more detail.

## **5. FINANCIAL IMPLICATIONS**

- 5.1. The cost implications for developing the 'Smart Routes' strategy will be met from within existing Joint Initiatives budgets.
- 5.2. One of the key principles of 'Smart Routes' is to improve the utilisation of resources and to encourage increased collaboration. The aim of this will be to improve on both the delivery and content of schemes thereby increasing their value for money.

## **6. CONTACTS**

1 - Andy Middleton, Head of Bus and Highway Projects, Centro  
Phone: 0121 214 7230  
Email: [andrewmiddleton@centro.org.uk](mailto:andrewmiddleton@centro.org.uk)

2 - Rod Black, Red Route Programme Manager, CEPOG Support Team  
Phone: 0121 214 7907  
Email: [rodblack@centro.org.uk](mailto:rodblack@centro.org.uk)

**Smart Routes Strategy  
Development Process Chart**

