

Bus Partnership Fund Application Form



Phase 1 – Capacity Funding

1. Applicant Details

Lead local authority	
Partners to the proposal	
Contact name and job title	
Contact email	
Contact telephone number	

2. Geography and Demographics

Max 500 words, excluding maps

Describe the geography which will be impacted by the proposal, using maps to specify the area. Provide basic population information, to indicate the likely travel habits and therefore how people will be affected by the proposed development.

3. Analysis of Problems and Opportunities

Max 3000 words, excluding diagrams and charts

Outline the problems, evidencing areas where road congestion is particularly problematic for bus. The opportunities should relate to bus priority developments, which are the focus of the Bus Partnership Fundⁱⁱ, as part of a multi-modal approach to sustainable future mobility provision.

4. Desired Outcomes

Max 1000 words

Describe the desired outcomes from the proposed bus priority developments. How do you plan to evaluate the achievement of these outcomes?

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5. Potential Options

Max 2000 words

Outline the ideas the partnership has for developing bus priority measures and an outline timescale for their delivery. Describe any quick wins i.e. developments which could be implemented within the financial year 2021/22ⁱⁱⁱ. Outline how you plan to work in partnership, if that has been established. Describe what consultation has taken place to arrive at these high-level options^{iv}.

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6. Resources Required

What resources is the partnership requesting from Transport Scotland to develop the proposals into an appraisal ^v ?	
What is the estimated total cost of the proposed infrastructure developments?	
What – if any - is the nature and extent of investment to be made by partners ^{vi} ?	
What – if any – other sources of investment will be available for the proposed developments ^{vii} ?	

7. Commitment of Partners

The proposal should be signed by the Chair and CEO of the local authority leading the partnership. Partners may indicate their support to the proposal through appended letters of intent or additional signatures below.

Organisation	Name	Job title	Signature
[Lead local authority]		Lead Councillor	
[Lead local authority]		CEO	

8. Submission of Proposals

Proposals should be submitted to buspartnershipfund@transport.gov.scot by 12 noon on Friday 25th September 2020.

9. Guidance Notes

ⁱ Relevant appendices or links to documents may be added, in addition to the word limits. For example, the partnership may wish to include links to community plans, transport strategies, STAG reports etc.

ⁱⁱ Partnerships should look to the STAG pre-appraisal phase, as a guide on the level of information required. It is recognised that you may not have all of the data at this stage but you should outline how you are going to produce the more detailed data – including forecast data - through the Outline Business Case (OBC) stage.

ⁱⁱⁱ Quick wins should be sustainable and fit with the longer-term, transformational developments proposed.

^{iv} Full details of the long-listing process are not required at this stage, as successful partnerships will have the opportunity to develop, evaluate and refine the options through the OBC stage. Where appraisals have already been carried out (for example, through city deals) partnerships should consider how these fit the future and the changes they will need to make to transport.

^v Support from Transport Scotland will be to fund the specialist resources required to develop an appraisal, as defined by the Scottish Transport Appraisal Guide (STAG). This will be required to access further infrastructure funding from the Bus Partnership Fund.

We recognise that some partnerships may have already conducted an appraisal and may be at Outline Business Case stage or even further with proposals. We also uphold the STAG principle that the level of appraisal required should be proportionate. Capacity funding will therefore take into account the stage the partnership is at and will be based on a proportionate view of what further appraisals and business cases are required to justify the infrastructure funding.

Partnerships are reminded that staff costs may be capitalised in considering the request for funding. All justifiable bids will be considered, including funding for early quick wins, which may already have been appraised.

^{vi} This may include investment in other measures, which will contribute to the holistic transformation of the bus service e.g. ultra-low or zero emission buses.

^{vii} Include sources and amounts of investment already secured or expected to be secured before the development projects commence. This may include in-kind investment, as well as finance, and should take account of contributions from bus operators and other partners, as well as local authorities.

Bus Partnership Fund

Project Board Meeting
20 Feb 2020

Agenda



TRANSPORT
SCOTLAND

COMHDHAIL ALBA

- Governance
- Deliverables, plan and progress
- Application process
- Communications & engagement
- AOCB

Governance

- Rigorous separation of decision-making from support and consultation functions:
 - To comply with competition rules
 - To protect against actual or perceived bias in evaluating bids
- Key decisions on process and awards to be taken by IDM Board (TS only)
- Emphasis on appropriate stakeholder engagement
- Draws on learning from other competitive funds
- **Decision requested: agree governance framework**

BPF work streams & deliverables



Work Stream	Fund Applications & Process	Bus Data, Evidence & Evaluation	Infrastructure Design & Assurance	Communications & Engagement
Key Deliverables	Application and evaluation processes for the Fund	Evidence base to support funding decisions and monitor outcomes	Guidance on the design of infrastructure projects and assurance processes to monitor delivery	Communication and engagement throughout the project
Products	<p>FAP01 – Application process</p> <p>FAP02 – Bid assessment methodology & process</p> <p>FAP03 - Assessment of barriers to LA delivery and partnership readiness</p> <p>FAP04- Establish the resource & finance support that LAs can access</p>	<p>DEE01 - Appraisal of baseline data and evidence on bus priority across areas/egions</p> <p>DEE02 - Appraisal of bus partnership working across Scotland</p> <p>DEE03 - Approach and template for standardising use of data and the production of evidence</p> <p>DEE04 - Approach for evidencing wider outcomes and benefits</p> <p>DEE05 - Research into bus priority infrastructure in UK/internationally</p> <p>DEE06 – Data evaluation process</p>	<p>IDA01 – Infrastructure design principles</p> <p>IDA02 – Infrastructure design guide</p> <p>IDA03 – Infrastructure delivery assurance process</p>	<p>CAE01 - Communications strategy and plan</p> <p>CAE02 - Stakeholder map</p> <p>CAE03 - Behaviour change: establish resources available to LAs to promote behaviour change in support of bus</p> <p>CAE05 - Marketing & branding of BPF</p> <p>CAE06 - Publication of all BPF-related materials</p> <p>CAE07 - Event(s) for promoting BPF (including online)</p> <p>CAE08 - Platform / approach to showcase best practice</p>
Key stakeholders to be consulted	COSLA, SCOTS, CPT, ATCO, RTPs	STPR2 team, Managed Motorways team, COSLA	Bidding partnerships, COSLA, CPT, SCOTS, STPR2 team, Managed Motorways team, RTPs	Communications & Engagement Strategy to include full stakeholder plan

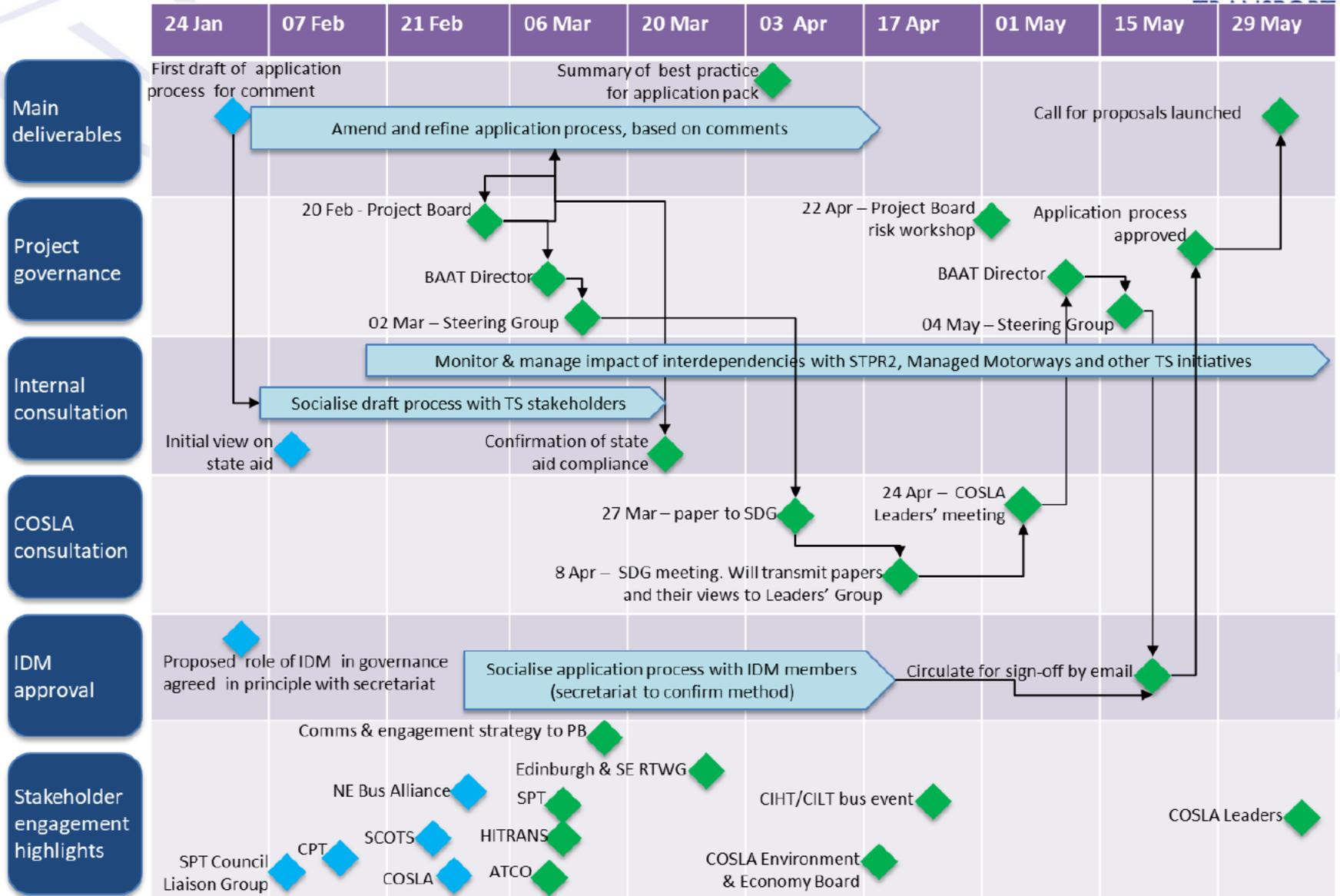
BPF project phases

Dates

Activities & work streams



Phase 1 plan and progress



Application process

- Application pack = call for proposals, application form, Q&A, BSIP paper, summary of best practice research
- Competitive process, in line with Cabinet Office guidance
- Proportionate information requirements, recognising different stages of partnerships
- Links to BSIP
- Funded developments will follow STAG, proportionately
- Details of financial phasing have been removed from call for proposals, pending further discussion with Finance
- Applications launch 22 May and close 25 September
- **Decision requested: authorise progress to formal consultation with COSLA and sign-off by IDM Board**

Communications & engagement



- Comms will build a narrative around the Transport (Scotland) Act and reinforce the importance of BSIPs
- Stakeholder engagement will be integral to plans for each work stream and phase of the project
- We will coordinate with colleagues in other key projects – e.g. STPR2 – to ensure we maximise the value from each engagement with our mutual stakeholders
- The Communications & Engagement Strategy will be circulated to the Board for approval by email

AOCB



**TRANSPORT
SCOTLAND**

COMHDHAIL ALBA

- Date of next meeting: 22 April 2020
- Next meeting will include a risk management workshop

Bus Partnership Fund (BPF)

Project Board

06 October 2020

Attendees:

Name	Role
[REDACTED]	[REDACTED]

1. Introduction to meeting

1.1 [REDACTED] gave [REDACTED] opportunity to pass on meeting as his presence was not necessary. [REDACTED] advised that [REDACTED] was unable to attend as Finance were very short-staffed. [REDACTED] thanked everyone for joining the meeting.

1.2 [REDACTED] communicated the meeting's agenda and checked that attendees were content, to which there was agreement.

2. Updates on progress of BPF

2.1 [REDACTED] communicated that BPF is re-starting after the necessary pause caused by COVID-19's impact on resources in central and local government. [REDACTED] updated that since Lockdown progress has made in terms of keeping stakeholders engaged. Lucia stated that offers under the Bus Priority Rapid Deployment Fund (BPRDF) have been made to individual local authorities and partnerships, representing a total of 18 local authorities to date and attendees looked forward to seeing temporary priority measures being implemented in the coming weeks and months. She updated that a BPF paper was agreed at COSLA's Settlement Distribution Group on 9th September and by COSLA Leader's Group on 25th September.

2.2 [REDACTED] presented the work steams in progress. [REDACTED] noted that SMT had a recent paper on setting up an agile team in TS about delivery of road space allocation to sustainable transport modes.

2.3 [REDACTED] communicated the new proposed timeline. [REDACTED] is to make an announcement at Scottish Transport Awards Summit on 28th October, which will signal the official launch of BPF on the 9th November. [REDACTED] updated that lead LAs have 5 months to develop partnerships and evidence for bids.

3. Bus Service Improvement Partnerships (BSIPs)

3.1 █████ explained what BSIPs involve, highlighting that they are set out in the Transport Act and involve a legal agreement between LAs and bus operators.

3.2 █████ communicated the timeline for BSIP regulations, indicating that they are likely to be laid in September 2021, so the formal BSIP process will probably be available in early 2022. The original start date has been pushed back due to Covid-19 and the complexities of BSIPs.

4. Phase 1 Discussion

4.1 █████ communicated that feedback from Steering Group was in favour of scope extension, with an agreement from █████ and Steering Group to include park and ride in BPF, where there are clear benefits to bus priority. In addition, the capital costs of enforcement (e.g. cameras) will be included in the scope of BPF.

4.2 █████ invited views on these points, to which █████ agreed her support.

4.3 █████ asked for any comments on the application documents to be submitted by end of next week.

4.4 █████ raised question on whether it will be possible to consider the public's view of bus in the process. █████ communicated that this will be considered by LAs and will be part of the STAG process for funded projects. █████ noted that BSIPs will also involve broader representation with, for example, passengers, Bus Users Scotland and potentially independent chairs of bus alliances/partnerships.

4.5 █████ updated the board on how applications will be evaluated and she proposed procuring consultancy support from an expert in the field to help Project Board with evaluation process and also for insurance gateways. There was general agreement from attendees to the suggested approach.

4.6 There was a discussion around how to ensure that infrastructure design is high quality given the experience on active travel infrastructure delivery. █████ communicated that, in regards to design standards, TS is only responsible for trunk road designs standards and LAs are responsible for the design of local roads. █████ said that she will speak to SCOTS in regards to what support they require in establishing design standards for bus priority measures. There was a piece of work required around standards to understand existing guidance (eg is it up to date?) and what additional might be required. █████ noted that Transport Scotland would have to meet any agreed standards as trunk road authority.

5. Communications

5.1 █████ outlined the two-pronged approach to communications, involving a soft launch at Scottish Transport Award Summit on 28th of October and a formal launch on 9th November. She said that █████ will help to gather positive stakeholder messages and create video content to support launch.

6. Phase 2 discussion

6.1 [REDACTED] communicated that timelines will differ for each partnership, and that Project Board is to report to Steering Group on ongoing engagement with partnerships, delivery progress, lessons learnt and any other relevant work stream areas. [REDACTED] stated that issues to be escalated to Steering Group include delivery barriers common to partnerships and legislative issues, for example, with BSIPs.

AOB

Next meeting – 15th December 2020
Risk Workshop - 3rd November 2020

[REDACTED] invited attendees to raise AOB, to which no comments were made.
[REDACTED] thanked attendees.

Bus Partnership Fund (BPF)

Steering Group

02 March 2020

Attendees

Name	Role
Laura Murdoch (LM) – Project Owner and Chair	Director (Bus, Accessibility and Active Travel)
Alison Irvine (AI)	Director (Transport Strategy and Analysis)
Hugh Gillies (HG)	Director (Roads)
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██████████	██
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[No apologies]

1. Minutes and actions from previous meeting

1.1 The action to provide feedback on the work streams was completed and there were no further comments on the minutes.

2. Update from BPF project team

2.1 █████ provided an overview of the indicative roadmap for the Fund, with the caveat that the funding would be subject to the upcoming Capital Spending Review.

2.2 █████ talked through the plan to launch, including the route to sign-off of the application process for the BPF.

2.3 There was a discussion on the launch event, which has yet to be planned and is subject to a discussion between LM and the Cabinet Secretary. █████ said that interest in the launch would be dependent upon what the BPF will pay for and he felt CEOs would not likely turn up for bus priority measures alone. AI noted that there were a number of other events and publications around the end of May, on e.g. Climate Change Plan, STPR2 and the Scottish Transport Awards. She noted we need to be clear about whether this is an event for PR purposes or to promote actions. █████ offered the help of bus operator marketing teams so the event is as creative as possible to catch attention.

2.4 LM agreed that there is more thinking to be done on how we design a meaningful event, which will attract the right audience. She wants the event to get local authorities and bus operators excited about the possibilities and we would need a hook to achieve that. █████ noted that, in doing so, we need to stick to the purpose of the BPF.

3. BPF design document: discussion

3.1 AI advised that the Fund should remain open for future rounds rather than just be a one-off. It might be that big cities may lead off but others may wish to get involved later in the process and we would be wise to allow that. █████ responded that

we have drawn a line in the sand to generate action, but have said that there may be further rounds of funding.

3.2 ■ said some places are looking for smaller investments and the need to be working towards a BSIP may be difficult. ■ responded that this is why we are engaging early; so partnerships can be formed in time. There was a discussion around what 'transformational' means and leaving room to fund smaller scale interventions that would, when joined up, make a big difference.

3.3 ■ asked how we evidence congestion in a consistent way and ■ responded that there are publicly available data sets and we are looking only for high-level evidence at this stage, to be refined through due process. We will provide further guidance on this, through the Bus Evidence and Evaluation work stream.

3.4 LM noted that we would provide strong messaging around the partnership aspects and ■ added that supporting documentation on BSIPs would be made available at launch. It was imperative that local authorities work with their neighbours given the geographical scope of bus services and ■ confirmed that the legislation and the Fund set-up was designed to reflect that.

3.5 LM said that the interactions with STPR2 would also be made clear.

3.6 ■ asked what Scottish Government is doing about rural bus provision and LM responded that this is recognised as a policy issue which is being worked through and potential solutions include Mobility as a Service and demand-responsive transport. There was likely to be a Bus Action Plan kicking off this year and rural bus would be one of the key areas of focus.

3.7 ■ asked about the 'stick' (as opposed to 'carrot') side of getting people out of cars and AI noted that we need to change the narrative to change behaviour. LM said affordability and viability of bus is key but there needs to be stick, as well as carrot. AI cited the Forth Crossing and Fastlink as examples to learn from.

3.8 ■ noted that bus operators' partnership commitments to looking at fares could only happen when the infrastructure is in place

3.9 ■ said they would take into account comments and circulate a draft application pack 'straw man' for comment to SCOTS, ATCO, COSLA and CPT (and this Group) as soon as possible. The Project Team would seek comments in this way to inform what was launched in May, also noting the Cabinet Secretary's role in the process.

3.10 Date of next meeting TBC.