

Transport Memoranda of Understanding (MoU) and Action Plans

Purpose of Report

1. To note progress on the MoUs and Action Plans with the Highways Agency, Rail Industry and the Health Sector and seek the views of the Joint Scrutiny Committee.

Background

2. The Multi-Area Agreement (MAA), signed in September 2009, is an agreement between the West of England authorities, Government and its agencies about key commitments in the area to deliver the Partnership vision for 2026.
3. The MAA action to 'improve access and reduce traffic congestion to increase competitiveness and quality of life' includes three transport related asks:
 - to accelerate the delivery and reduce the cost of major transport schemes
 - to improve rail services and
 - to improve complementary working with the Highways Agency.

Major Transport Schemes

4. Under this ask the Department for Transport agreed to use the North Fringe to Hengrove Package scheme as a national pilot for developing and testing measures to increase the pace of delivery, release capacity and reduce the costs of developing and securing approval for Major Transport Schemes. The pilot brought benefit by streamlining the development process with the Department for Transport and enabled the scheme to be progressed from inception to a major scheme bid for Programme Entry in less than a year. Unfortunately progress on development of the scheme has been drawn into the Government's comprehensive spending review. It is hoped that engagement with the Department for Transport will recommence later in the year.

Highways Agency Memorandum of Understanding (Appendix 1)

5. The Memorandum of Understanding between the West of England authorities and the Highways Agency promotes more effective and complementary working across strategic and operational matters. The Memorandum of Understanding was signed at the Joint Transport Executive Committee on 12 November 2009.
6. Outcomes to be delivered through the MoU over the next 12 months are set out in the 2010/11 Action Plan. This was agreed at the Joint Transport Executive Committee on 18 March 2010 and progress was reported to the Committee on 17 September 2010 (see Appendix 2). This Plan builds upon existing arrangements

between the authorities and the Agency, including the existing Detailed Local Operating Agreements.

7. The Action Plan sets out areas where there is scope for new or improved practice in the way in which the authorities interact with the Highways Agency. It identifies more than 20 areas where the parties consider there is scope for improved communication, greater cooperation or coordination of activities. Key highlights of the first 6 months of the Plan include:

- Improved communication and engagement across operational aspects, planning, policy and media activity.
- Close engagement with the Highways Agency on the development of Joint Local Transport Plan 3 including involvement in the Strategy Working Groups and input into the emerging Delivery Plan.
- Local authority involvement in plans for the implementation of the M4/M5 Managed Motorways project.
- Joint delivery arrangements for a programme of works at M5 junction 19 aimed at reducing congestion and improving safety. This will involve upgrading the existing traffic signals on the roundabout, resurfacing works, the replacement of crash barriers, new developer funded traffic signals on the A369 approaches to the roundabout, and a High Occupancy Vehicle/bus lane on the A369 south approach as part of the Greater Bristol Bus Network (GBBN). The various phases will be coordinated into one programme to ensure that disruption is kept to a minimum and that best value is achieved in the procurement of the works. The £3m programme of works will start in September 2010 and be complete by June 2011.
- Agreed programme of regular meetings between the Highways Agency and the authority Traffic Managers to discuss operational issues including programmed works and events, exchange and use of traffic information, data sharing and incident management.
- Agreement in August 2010 of a protocol for the free and timely exchange of traffic data unless specifically excluded (eg data owned by third parties).

8. Key issues arising from progress on the tasks within the Plan include:

- The Government's Comprehensive Spending Review is having an impact, in particular with progressing those activities related to authority or Highways Agency major schemes.
- Although some tasks have slipped into the next 6 monthly period, the improved lines of communications promoted by the Plan are providing benefit in advance of the achievement of the formal milestones eg informal data sharing of Automatic Number Plate Recognition (ANPR) data collected for the M4/M5 Managed Motorways project to support authority scheme assessment; ad hoc reviews of individual aspects of information exchanges such as use of Variable Message Signs (VMS); and early discussion about the scope for shared contracts to reduce costs.

9. Future activities in the coming months include:

- Comprehensive review of the information contained within the Detailed Local Operating Agreements between the individual authorities and the Highways Agency to increase the scope of these documents and ensure where appropriate a common approach.
- Establishing specific processes and programmes for the coordination of works on authority and Highways Agency networks, including agreeing thresholds for impact assessment and confirming maintenance responsibilities.
- Concluding the review of current arrangements for working with Police, bus operators and other stakeholders to better understand the respective roles around incidents, works and events.
- Reviewing the effectiveness, breadth and detail of contingency planning arrangements.
- Concluding the review of mechanisms and arrangements for liaison and information exchange including use of the HA Regional Control Centre and the Bristol City Council Traffic Control Centre.
- Build upon the recently published HA protocol to establish clearer joint processes for relevant planning applications.

10. It is planned that these activities will be concluded by the end of the Plan period in March 2011.

Rail Industry Memorandum of Understanding (Appendix 3)

11. The MoU between the West of England authorities, Network Rail, First Great Western, Cross Country and South West Trains was signed at the Joint Transport Executive Committee on 2 July 2010. Its purpose is to promote effective co-ordination and co-operation between the organisations. It includes consultation on timetable changes, investment and planning decisions, input into the Joint Local Transport Plan 3 and co-ordinating data collection.

12. The outcomes to be delivered are included in the draft Action Plan and timeline (see Appendix 4) considered by the Joint Transport Executive Committee on 17 September 2010. Following discussions with the rail industry, the action plan is based on:

- the short term (2009 – 2014: Network Rail Control Period 4);
- the medium term (2014 – 2019: Network Rail Control Period 5); and
- the long term (2019 onwards: Network Rail Control Period 6+).

It is focused on evidence, impacts, options, milestones and outcomes.

13. The draft Action Plan considered at the Joint Transport Executive Committee on 17 September 2010 includes joint arrangements for:

- Influencing Government policies on rail spending and priorities
- Informing, contributing and influencing the next rail franchises
- Greater understanding of and input into timetable changes
- Making the business case for new rolling stock for West of England Services
- Supporting the electrification proposals and opportunities for infilling gaps and providing a suburban electric train network
- Developing a Greater Bristol Rail Plan and a clear, realistic and deliverable vision for rail in the long term.

Memorandum of Understanding with the Health Sector (Appendix 5)

14. The development work on the Joint Local Transport Plan 3 (JLTP3) and the Sustainable Community Strategies of the Local Strategic Partnerships have highlighted how walking and cycling can increase physical activity and have large health benefits. This has led to close working and the development of a Memorandum of Understanding (MoU) with the health sector. It is hoped the MoU will help capture the health benefits of active travel and build closer relationships between the health sector and the local authorities. The MoU (Appendix 5) was signed at the Joint Transport Executive Committee on 17 September 2010.
15. The purpose of the joint work is to promote and protect good health through delivery of the goals and ambitions set out in key Government policy documents and Local Development Frameworks, adapting as appropriate, to the proposed major changes in the way local health services are run. The health sector is a key partner in the production of the JLTP3 and is providing input, expertise and feedback. The partners will align, where practicable, a programme and phasing of schemes for 2011 to 2026 for inclusion in the Delivery Plan of the JLTP3. As part of the closer working, the Directors of Public Health for the Partnership area arranged a Health and Transport Consultation Event on 17 September, bringing together a range of managers and practitioners from the health sector to consider the draft JLTP3.
16. It is proposed that a Transport and Health Forum is established to promote effective collaboration and develop joint outcomes. The Forum will report to the Joint Transport Executive Committee and an Action Plan will be developed. The Directors of Public Health will provide updates for and attend meetings of the Joint Transport Executive Committee on a twice-yearly basis to consider progress on the Action Plan.

Recommendation

That Members note progress on the MoUs and Action Plans with the Highways Agency, Rail Industry and the Health Sector and give views.

Appendices

Appendix 1: Signed MoU with the Highways Agency

- Appendix 2: Highways Agency 2010/11 Action Plan – Progress Update September 2010
- Appendix 3: Signed MoU with the Rail Industry
- Appendix 4: Draft Rail Action Plan
- Appendix 5: Signed MoU with the Health Sector

Officer presenting the report:

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West of England Partnership

Bath & North East Somerset Council



North Somerset Council

South Gloucestershire Council



HIGHWAYS AGENCY

Memorandum of Understanding

This Memorandum of Understanding is between the local authorities of Bath & North East Somerset, Bristol City, North Somerset and South Gloucestershire who together make up the West of England Partnership and the Highways Agency. The purpose of the Memorandum of Understanding is to promote effective co-ordination and co-operation between the two organisations.

The Memorandum of Understanding will facilitate Highways Agency and West of England Partnership authority priorities being clearly aligned to achieve a balance between the national/regional highways objectives and the improved transport provision needed to accommodate the high levels of housing growth required by the Regional Spatial Strategy and economic growth sought by the Regional Economic Strategy.

The key principles are of openness and understanding together with shared responsibility and ownership of problems and solutions.

The Memorandum of Understanding is a supporting document of the West of England's Multi-Area Agreement.

It is hereby agreed that:

The Highways Agency will be key stakeholders in the production of the Joint Local Transport Plan 3 and provide input, expertise and feedback as appropriate and reciprocally the West of England Partnership authorities will be key stakeholders in Highways Agency's strategic plans.

A programme and phasing of Highways Agency and West of England Partnership authority schemes for 2011 – 2016 is to be agreed for inclusion in the Delivery Plan of the Joint Local Transport Plan 3 and a joint work stream is to be established to facilitate this.

Highways Agency and West of England Partnership authorities will collaborate to develop key milestones towards the Delivering a Sustainable Transport System goal to support national economic competitiveness and growth by delivering reliable and efficient transport networks, including Strategic National Corridor 6 London to the South West and South Wales and Corridor 7 Exeter/Bristol to the Midlands.

Highways Agency to provide full and timely and comprehensive engagement on the management of the strategic road network including its forward programme.

West of England Partnership authorities to provide full and timely and comprehensive engagement on the management of the local transport network, including its RFA2 programme of transport major schemes.

West of England Partnership authorities to provide information on planned future sub-regional housing and economic growth and other planned investment and priorities.

A working protocol is to be agreed for processing significant planning applications which deliver economic growth and journey time reliability.

Highways Agency and West of England Partnership authorities will have due regard to each others networks in making plans for and implementing traffic management measures on their networks. Arrangements will be established to ensure the overall effective operation of the total integrated network.

Quarterly officer meetings between Highways Agency and West of England Partnership authority officers will be established and Highways Agency will provide updates for and attend meetings of the Joint Transport Executive Committee on a twice yearly basis.

The Memorandum of Understanding partners will identify a senior contact officer with lead responsibility for the Memorandum of Understanding.

Information requests between the Memorandum of Understanding partners will be dealt with within 14 working days. Requests are to be as specific as possible.

Where appropriate data collection is to be co-ordinated between the Memorandum of Understanding partners to maximise the use of data and enable cost sharing.

A joint framework on communications will be established in order to promote levels of engagement and partnership working between West of England Partnership authorities and Highways Agency.

The Memorandum of Understanding shall come into immediate effect.

The West of England Partnership authorities and Highways Agency will jointly review the arrangements set out in the Memorandum of Understanding at yearly intervals.

Dated

HIGHWAYS AGENCY

[Signature]
Signed on behalf of Highways Agency

Bath & North East Somerset Council

[Signature]
Signed on behalf of Bath & North East Somerset Council



Signed on behalf of Bristol City Council

[Signature]
Jon Rogers

North Somerset Council

Signed on behalf of North Somerset Council

[Signature]

South Gloucestershire Council

Signed on behalf of South Gloucestershire Council

[Signature]

Appendix 2

West of England Authorities and Highways Agency Memorandum of Understanding - 2010/11 Action Plan

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Progress this Period
					March 2010	Current	
Strategic Plans							
A. Joint Local Transport Plan 3 (JLTP3)	Need to increase Highways Agency involvement in the development and implementation of JLTP3	A1 HA to be key members of Transport Plan Commission	HA invited to attend inaugural meeting of Commission	James White (WEPO) and David Wright/Ron Davis (HA)	Achieved	Achieved	Transport Plan Commission met for the first time on 29 March 2010 and subsequent meeting on 15 June 2010.
		A2 Involve HA in JLTP3 Network Management and Strategy Working Groups	HA provided with draft Network Management and Freight supplementary document	James White (WEPO) and David Wright/Ron Davis (HA)	Achieved	Achieved	Latest version of Network Management and Freight Supplementary Documents supplied to HA for comment July 2010.
		A3 HA participation in the JLTP3 Delivery Plan Working Group	Invite HA to Spring 2010 meeting of the Delivery Plan Working Group	Paul Paton (NSC) and David Wright/Ron Davies (HA)	September 2010	Achieved	Emerging material on Delivery Plan process shared with the HA. HA attended Delivery Plan Working Group meeting on 9 August 2010.
B. Highways Agency's regional forward programme	Need to increase West of England involvement in development of Highways Agency plans related to the West of England transport network	B1 Authorities to participate in the HA Managed Networks Group	WEPO to be invited to HA Managed Networks Group meetings	Barbara Davies (WEPO) and David Wright/Ron Davies (HA)	Achieved	Achieved	WEPO attended the HA South West Managed Networks Group meeting 23 February 2010, and will be invited to relevant future meetings which are held on an ad hoc basis.
		B2 Authorities to participate in development of HA's forward programme of work on the motorway and trunk road network within and adjacent to the West of England area.	Information on relevant emerging and Published Plans and other reports to be provided to WEPO, including involvement in workshop reviewing and determining the 4 year forward programme	Barbara Davies (WEPO) and David Wright/Ron Davies/David Sledge (HA)	September 2010	March 2011	HA's 4 year forward programme to be shared with the UA Traffic Managers through quarterly meetings. First meeting to be held in mid September 2010.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Progress this Period
					March 2010	Current	
Strategic Plans							
C. Delivering a Sustainable Transport Strategy (DaSTS)	Need for better understanding and input into process and outcome of DaSTS studies	C1 Arrangements for involvement in DaSTS study steering groups	HA sit on DaSTS Programme Group overseeing all SW projects. Regular updates to be provided by WEPO on local study	Bill Davies (WEPO) and David Wright/Ron Davies (HA)	September 2010	Achieved	HA attended DaSTS Project Board meetings for Phase 1 in April and May 2010 and contributed to study.
Coordination of Programmes							
D. Managing the Existing Network	Ensure effectiveness of Network Management Duty/ Detailed Local Area Operating Agreements (DLOAs)	D1 Review DLOAs at least annually and ensure that necessary amendments are made, that Mutual Objectives are met and new objectives developed	All four DLOAs to be reviewed and changes agreed as appropriate	Authority Traffic Managers and David Sledge (HA)	March 2011	March 2011	DLOAs being regularly reviewed. HA circulated CD containing all diversionary routes. Wider review of DLOAs to be undertaken to consider opportunities to extend scope including common and consistent material across UAs.
	Authority Network Management Plans (NMPs) yet to be finalised and need to involve HA in the process and reciprocal arrangements for HA plans	D2 Agree means for West of England authority liaison with HA on NMPs	Agreed calendar of quarterly meetings between Authority Traffic Managers and HA	Kelvin Packer (B&NES) and David Sledge (HA)	March 2011	March 2011	Programme of regular meetings to commence on 24 September. Role of UA NMPs to be considered as part of the wider review of DLOAs (see D1). HA has not published any strategic plans this period.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Notes
					March 2010	Current	
Coordination of Programmes							
D. Managing the Existing Network	Coordination and planning of works and events	D3 Review current arrangements and their effectiveness to support West of England-wide coordination of Primary Road Network (PRN) road works and events	Use J19/21 to test and review processes	Frank Cox (NSC) and David Sledge (HA)	March 2011	March 2011	Work on a joint NSC/HA programme of works for M5 J19 continues with works starting later this year. The lessons learnt from this will be used to prepare/update processes for effective working via a procedural note and debrief session.
			Specific processes and programmes in place for current schemes: 1) M5 J19/A369, 2) M5 J21/A370 improvements	Frank Cox (BCC) and David Sledge (HA)	March 2011	March 2011	M5 J21 Weston Package major scheme works on hold.
	Working with Police, bus operators and other stakeholders	D4 Examine mechanisms such as NMP's, incident debriefings, post event reviews etc to achieve better understanding of respective roles and views	Undertake review of current arrangements and report back to quarterly meetings between Authority Traffic Managers and HA	Kelvin Packer (B&NES) and David Sledge (HA)	September 2010	March 2011	HA involving Traffic Officer Service in Action Plan to consider operational impacts. Debriefings taking place. Effectiveness of arrangements being reviewed including links with DLOA.
	Understanding the impact of planned works	D5 Build on existing mechanisms to enhance the assessment of wider impact of works embracing both strategic and local network	Agree thresholds and arrangements for wider assessment of impacts of planned works	David Buckland (SGC) and David Sledge (HA)	September 2010	March 2011	No suitable schemes to date. HA involving authorities in development of the M4/M5 Managed Motorways Project and impact on local network being considered (see E2 ii). Forthcoming programme to be reviewed as part of the quarterly meetings between HA and Traffic Managers. Process also covers new schemes as per E3.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Notes
					March 2010	Current	
Coordination of Programmes							
D. Managing the Existing Network	Process and scope for information exchange on traffic flows, incidents and travel information	D6 Ensure effective use is made of mechanisms and arrangements for liaison and enhanced links including use of HA Regional Control Centre (RCC) and Bristol Traffic Control Centre (TCC)	Undertake review of current arrangements and report back to quarterly meetings between Authority Traffic Managers and HA	Terry Bullock (BCC) and David Sledge (HA)	September 2010	March 2011	Current arrangements reviewed as required and to be considered through quarterly meeting of HA and Traffic Managers. Number of existing mechanisms for information exchange and use (eg weekly sharing of road reports, notification of closures with wider impact, use of HA VMS to advise of events). Recent review of VMS use highlightd need to develop links between BCC TCC and HA RCC to grant access to VMS and signal strategies for incident management outside of operational hours.
	Clear understanding of maintenance responsibilities	D7 Confirm division of maintenance responsibilities	Review current responsibilities and issues and report back to quarterly meetings between Authority Traffic Managers and HA	Frank Cox (NSC) and David Sledge (HA)	September 2010	March 2011	This work is evolving out of D3 above.
	Effectiveness of contingency plans	D8 Review effectiveness, breadth and details of contingency planning arrangements	Undertake review of current arrangements and report back to quarterly meetings between Authority Traffic Managers and HA	David Buckland (SGC) and David Sledge (HA)	September 2010	March 2011	No incident has yet arisen to test contingency planning arrangements.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Progress this Period
					March 2010	Current	
Coordination of Programmes							
E. New Transport Schemes	Need to make best use and coordinate traffic data collection and exchange	E1 Confirm arrangements for sharing data and method of coordination of data collection programmes to ensure value is maximised.	Produce data sharing agreement	Bill Davies (WEPO) and Ron Davies (HA)	September 2010	Achieved	Informal data sharing occurring on an ad hoc basis eg HA supply of ANPR data collected for M4/M5 Managed Motorways Project to UAs. Protocol agreed for free and timely exchange of data between parties unless specifically exempt.
	Major Schemes/ Improvements: Early and ongoing engagement in scheme development and specification	E2 Reciprocal arrangements for membership of/active involvement in scheme Project Boards or equivalent forums at specific stages of scheme development	HA invited to be members of relevant Authority major scheme Project Boards.	Pete Davis (WEPO) and Ron Davies (HA)	Achieved	Achieved	HA on North Fringe to Hengrove Package Programme Board and had key role in developing major scheme bid submitted in March 2010. HA also sit on Weston Package and South Bristol Link Project Boards.
			WEPO to be invited to: (i) Attend HA Managed Networks Group meetings	Barbara Davies (WEPO) and Ron Davies (HA)	Achieved	Achieved	WEPO attended the HA South West Managed Networks Group meeting 23 February 2010 and to be invited to relevant future meetings
			(ii) Make contributions at key stages of scheme development	Barbara Davies (WEPO) and David Sledge (HA)	September 2010	March 2011	HA organised presentation to UAs on the M4/M5 Managed Motorways Project in June 2010. Scheme currently on hold. Emerging proposal for communications/CCTV equipment on UA diversionary routes during works submitted to HA Project Manager.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Progress this Period
					March 2010	Current	
Coordination of Programmes							
E. New Transport Schemes	HA Local Network Management Schemes: Need to better consider impact on the local network	E3 Review arrangements for assessment of impact of schemes on local road network	Define mechanism and thresholds for assessment of impacts of schemes on the local network	Joint Officer Modelling Group	September 2010	See D5	Being progressed as part of item D5 bringing together planned works on the existing network and new schemes.
New Development							
F. Significant planning applications	Better joint understanding and process required in considering planning applications, including early engagement	F1 Clearer joint processes, including early engagement	Hold workshop as a basis for designing clearer joint processes	West of England nominated Head of Planning in conjunction with a Head of Transport and Ron Davies (HA)	September 2010	March 2011	UA protocol with developers being prepared. HA invited to Growth and Delivery event in October. HA published protocol for dealing with planning applications in August. Need for further action on joint processes being considered.
G. Sub-Regional Growth in Homes, Jobs and Communities	Insufficient joint engagement and consultation about growth targets and prioritised delivery plans	G1 Provision for early information and joint working on growth levels and delivery plans, supported by quarterly meetings programme	Continue current engagement in Single Conversation. More timely joint engagement in planning for growth, in particular sub-regional development trajectories, balancing the requirements with transport and other impacts.	Laura Grady and Pete Davis (WEPO) involving Authority Heads of Planning and Transport as appropriate and Ron Davies (HA)	September 2010	March 2011	Meeting between WEPO and HA in June. HA included on Single Conversation Programme Board dependant on agenda.

Existing Arrangement, Process or Practice	Current Performance and Issues	New Practice, Means of Improvement and Implementation	Action/ Outcome	Lead Officer(s)	Status/ Target		Progress this Period
					March 2010	Current	
Communication and Interaction							
H. Media Relations	Alert parties to any press release to be sent out that impacts on other party (more information better than less) or include all parties on distribution lists	H1 Ensure details of all 6 press offices are exchanged – including out of hours contact information.	Circulate list of contact details	West of England Press Officers/Julia Dean (WEPO) and Rachel Whitelock (HA)	Achieved	Achieved	During this time period the general election took place and the DfT subsequently issued new guidance on major schemes. As a result there has been minimal promotion, press or public discussion on relevant schemes during this period.
I. Communication Plans	Need to share relevant communication plans	I1 Authority project communication plans and project overviews to be shared with HA to keep them informed about projects. HA can raise any potential issues	Major scheme communication plans produced and agreed via Project Boards on which HA attend those relevant. Other relevant plans/project overviews to be circulated when published	Julia Dean (WEPO)	September 2010	Achieved	HA attendance at Project Boards continues; communications plans are updated as required by the Boards as projects progress. No new project overviews have been developed in the period.
		I2 Communication plans for HA projects or planned works to be shared with West of England Authorities. West of England authorities can raise any potential issues	Project communication plans to be shared with West of England authorities to ensure no surprises culture	Rachel Whitelock (HA)	September 2010	March 2011	To be supplied as new schemes come forward.



Memorandum of Understanding between the West of England Partnership, Network Rail, First Great Western, CrossCountry and South West Trains

This Memorandum of Understanding is between the local authorities of Bath & North East Somerset, Bristol City Council, North Somerset and South Gloucestershire who together make up the West of England Partnership Network Rail, First Great Western, CrossCountry and South West Trains referred to as 'Memorandum of Understanding partners'. The purpose of the Memorandum of Understanding is to promote effective co-ordination and co-operation between the five organisations.

The key principles are of openness, explanation and discussion together with shared responsibility and ownership of problems and solutions.

The Memorandum of Understanding is a supporting document of the West of England's Multi Area Agreement.

It is not legally binding.

It is hereby agreed that

Strategy

The Memorandum of Understanding partners collaborate to develop key milestones to support achievement of the Delivering a Sustainable Transport System goal to support national economic competitiveness and growth by delivering reliable and efficient transport networks, including Strategic National Corridors 6 London to the South West and South Wales and 7 Bristol to the Midlands.

Network Rail, First Great Western, CrossCountry and South West Trains will be key stakeholders in the production of the four West of England authorities Joint Local Transport Plan 3 and will provide input, expertise and feedback as required.

The Memorandum of Understanding partners align, where practicable a programme and phasing of schemes for 2011 to 2026 for inclusion in the Delivery Plan of the Joint Local Transport Plan 3.

Engagement on changes and planning decisions

First Great Western, CrossCountry and South West Trains to provide timely consultation on timetable changes.

First Great Western to inform the West of England Partnership of proposed changes to station management and publicity.

Network Rail to provide full and timely consultation on investment and planning decisions including the Network Rail Business Plan, Network Rail Discretionary Fund and other smaller schemes.

Network Rail, First Great Western, CrossCountry and South West Trains to provide timely engagement with the West of England Partnership authorities in planning for and provide advance notice on engineering works and replacement services.

Rolling Stock

First Great Western, CrossCountry and South West Trains to provide early engagement on their strategic plans for the provision of rolling stock on West of England services, with support provided by the West of England authorities in the lobbying efforts to secure additional capacity and funding.

West of England

The West of England Partnership to provide full and timely and comprehensive engagement on its programme of transport major schemes.

The West of England Partnership authorities to provide evidence information on planned future sub-regional housing and economic growth and other planned investment and priorities.

Support

Network Rail, First Great Western, CrossCountry and South West Trains officers to provide updates for and attend meetings of the Joint Transport Executive Committee on a twice-yearly basis.

Network Rail, First Great Western, CrossCountry and South West Trains to attend and provide technical support and advice to the West of England Rail Project Group.

The Memorandum of Understanding partners will identify a senior contact officer with lead responsibility for the Memorandum of Understanding

Information and Data Collection

Information requests between Memorandum of Understanding partners will be managed as quickly as is reasonable depending on the complexity of the request and information available. Requests are to be as specific as possible.

Where appropriate data collection is to be co-ordinated between the Memorandum of Understanding partners to maximise the use of data and enable cost sharing. Any costs will be mutually agreed by partners as per the appropriate contractual arrangement.

Communications

A joint framework on communications will be established in order to promote levels of engagement and partnership working between the Memorandum of Understanding partners.

The Memorandum of Understanding shall come into immediate effect. The West of England Partnership authorities, Network Rail, First Great Western, CrossCountry and South West Trains will jointly review the arrangements set out in the Memorandum of Understanding at two yearly intervals.

Dated 2 July 2010

Network Rail

First Great Western

CrossCountry

South West Trains

Bath & North East Somerset Council

Bristol City Council

North Somerset Council

South Gloucestershire Council

Appendix 4

West of England Authorities, First Great Western, Network Rail, Cross Country and South West Trains Memorandum of Understanding

Draft Rail Action Plan

Existing Arrangement, Process or Practice	Evidence	Impacts	Options to deliver	Links	Lead Officer (support)	Milestone*	Outcomes
Short Term 2009 to 2014 (Control Period 4)							
Key Strategic Issues							
<i>Joint Local Transport Plan 3 2011 to 2026 (JLTP3)</i>	Growth in rail passengers. Forecast growth. Support for RUS.	Increased involvement of partners in the development and implementation of JLTP3.	Partners to be key members of Transport Plan Commission and relevant working groups including Rail Project Group.	RUS HLOS2 MAA Franchise SWRP	James White/UA officers (Chris Aldridge) (Julian Crow) (Richard Gibson) (Phil Dominey) (SCRP)	March 2011 Autumn 2011 review	Develop a Greater Bristol Rail Plan.
<i>JLTP3 Delivery Plan 2011 to 2014</i>	Growth in rail passengers. Forecast growth. Support for RUS.	Increased involvement of partners in the development and implementation of the JLTP3 Delivery Plan.	Expand the scope of the Delivery Plan to include partners' scheme programmes: Keynsham ramp, Bristol Temple Meads interchange, electrification, Reading, IEP, Birmingham Gateway, Cross Rail and new rolling stock.	RUS HLOS2 Franchise SWRP	James White/UA officers (Chris Aldridge) (Julian Crow) (Richard Gibson) (Phil Dominey) (SCRP)	March 2011 - Interim Delivery Plan Autumn 2011 - final Delivery Plan	Common way forward on rail schemes. Greater Bristol Rail Plan.
<i>Network Rail Business Plan</i>	Network capacity and reliability. Growth in rail passengers. Core Strategies housing and employment growth.	Increase West of England involvement in development of Network Rail's Business Plan related to the West of England transport network.	Involvement in: Network Rail Route Plan Network Rail Discretionary Fund Stations RUS (in progress, Draft for Consultation 2011).	RUS HLOS2	Chris Aldridge (UA officers)	Initial Strategic Business Plan June 2011	Problems and gap based analysis. Make best use of existing infrastructure. Understand and identify schemes which require more detailed development work. Greater Bristol Rail Plan.

<i>Train Operating Companies Business Plans</i>	Network capacity and reliability. Growth in rail passengers. Core Strategies housing and employment growth.	Increase West of England involvement in development of partners' Business Plans related to the West of England transport network.	Involvement in: Relevant FGW, CC and SWT plans – to specify.	HLOS2 MAA Franchise SWRP CS	Julian Crow Richard Gibson Phil Dominey (UA officers)	To add for relevant plans	Problems and gap based analysis. Make best use of existing infrastructure and services. Understand and identify schemes which require more detailed development work. Greater Bristol Rail Plan.
<i>Overcrowding</i>	Growth in rail passengers. Forecast growth. Short formed trains.	Insufficient provision of rolling stock for West of England services.	Single focus to lobby DfT for additional rolling stock.	RUS Franchise HLOS2	UA officers (Julian Crow) (Richard Gibson) (Phil Dominey) (SCRP)	Ongoing	Consistent message on rolling stock to influence Government policy. Additional rolling stock for current West of England train services.
<i>Franchises</i>	New Great Western franchise from 2016. Growth in rail passengers. Forecast growth. Support for RUS. Reforming Rail Franchising. July 2010. CrossCountry and South West Trains franchise.	Network of future local rail services and Greater Bristol Metro.	Need for early engagement in the refranchising process setting out West of England requirements. Response to Reforming Rail Franchising consultation	Franchise RUS HLOS2	Julian Crow (UA officers) (Richard Gibson) (Phil Dominey) (SCRP)	To add	Inform, contribute and influence response to next franchise. Greater Bristol Rail Plan. Longer term franchises.
<i>Electrification</i>	Great Western mainline electrified to Bristol by 2016 and Cardiff by 2017.	“Sparks” effect on patronage. Additional capacity. New electric rolling stock (IEP and local trains).	Need for early involvement in electrification proposals and identify opportunities for infilling and suburban electric train services linked to rolling stock programme.	RUS HLOS2 MAA Franchise SWRP	Chris Aldridge (UA officers) (Julian Crow) (Richard Gibson) (Phil Dominey)	GRIP Stage 2 Completion Sept 2010	Consistent message on need for electrification. Greater Bristol Rail Plan.
<i>Lobbying</i>	West of England voice not being heard in Government.	Not securing new infrastructure, rolling stock and services.	Single focus to lobby DfT on rail issues. West of England House of Commons events.	RUS HLOS2 JLTP3 MAA Franchise SWRP	Julia Dean Chris Aldridge Julian Crow Richard Gibson Phil Dominey	Ongoing	Raise profile of the West of England. Influence Government policies and spending priorities.

<i>Local Enterprise Partnership</i>	Coalition Government proposal	Greater voice for business on transport issues	Government invitation to set up a LEP. LEP Project Board	RUS HLOS2 JLTP3 Franchise	Terry Wagstaff (Chris Aldridge) (Julian Crow) (Richard Gibson) (Phil Dominey)	Sept 10	Common way forward and support for rail schemes and services.
Other Issues							
<i>Timetable changes</i>	Mechanism needed to inform Members of changes and how to influence them.	Lack of awareness and understanding of changes by Members and public.	Timely engagement on proposed timetable changes. Sevenside Rail Partnership JTEC updates twice a year.	RUS HLOS2 Franchise	Julian Crow Richard Gibson Phil Dominey (UA officers) (SCRP)	JTEC September 2010 JTEC March 2011	Greater understanding of and input into timetable changes.
<i>Severn Beach line services</i>	Growth in rail passengers.	Overcrowding. Revenue protection.	New contract between FGW/BCC/SGC. Ticket examiners appointed by FGW.	RUS JLTP3 Franchise	Julian Crow Peter Mann (BCC) Chris Sane (SGC) SCRP	May 2011	Continued growth in Severn Beach line passengers.
<i>Information on engineering work, replacement services, station management and publicity</i>	Mechanism needed to keep WEP councils informed and involved earlier.	Lack of awareness and misunderstanding by WEP councils.	Set out clear timescales for earlier involvement when planning for and advance notice on engineering works and replacement services, station management and publicity.		Chris Aldridge Julian Crow Richard Gibson Phil Dominey (UA officers) (SCRP)	Ongoing	Greater awareness by and earlier involvement of WEP councils in planned changes.
<i>Data collection (non commercial/confidential)</i>	Data collected separately by partners.	Not making best use of and co-ordinating data collection and exchange.	Produce data sharing agreement. Co-ordination of data collection programmes to ensure value is maximised.	JLTP3 RUS HLOS2 Franchise	UA officers Chris Aldridge Julian Crow Richard Gibson Phil Dominey	Agreement March 2011. Ongoing.	Single focus for data collection and robust evidence to support Greater Bristol Rail Plan.
<i>Significant planning applications</i>	Core Strategies housing and employment growth. Network Rail development land.	Not maximising potential for rail linked development.	Early engagement on planning applications through Rail Project Group.	RUS CS Franchise HLOS2	UA officers Chris Aldridge (Julian Crow) (Richard Gibson) (Phil Dominey)	Ongoing.	Maximise the role of rail in serving new developments.
<i>Freight</i>	Rail freight carried. Future forecasts. Port of Bristol expansion.	Network capacity.	Early engagement with rail freight companies and Port of Bristol on future plans. Freight RUS, March 2007 Strategic Freight Network April 2008	RUS HLOS2 JLTP3	Chris Aldridge (James Willcock, NSC) Andy Davies, BCC)		Maximise the level of freight carried by rail without reducing passenger train capacity.

<i>Security</i>	Crime figures provided by British Transport Police	Discourage people from using rail services.	Severnside Community Rail Partnership to raise issues with British Transport Police.	JLTP3 Franchise	British Transport Police Julian Crow Richard Gibson Phil Dominey (SCRP)	Sept 2010	Ensure a safe and secure rail network.
<i>Media Relations and communication Plans</i>	Lack of a joined up approach.	Partners not consulted or informed before press statements.	Ensure details of all press offices are exchanged – including out of hours contact information. Project communication plans and project overviews to be shared by all partners to keep them informed about projects.		Julia Dean Chris Aldridge Julian Crow Richard Gibson Phil Dominey	Ongoing	Consistent approach on rail stories.
Medium Term 2014 to 2019 (Control Period 5)							
<i>Rolling Stock</i>	No new rolling stock for the South West. Growth in rail passengers. Forecast growth. Support for RUS.	Overcrowded trains. Potential of rail's contribution to development and sustainable travel not maximised.	Joint working on bids for new/replacement rolling stock for validation by DfT. Lobby for electric rolling stock for local services.	RUS HLOS2 MAA Franchise SWRP	UA officers Chris Aldridge Julian Crow Richard Gibson Phil Dominey SCRP	To add	Single focus to influence Government policy. Make the business case for new rolling stock for West of England services.
<i>Route Utilisation Strategy</i>	RUS programme of schemes.	Major improvements to network capacity and services.	Need for early WEP councils engagement and input into plans to implement the RUS.	RUS HLOS2 JLTP3 SWRP	Chris Aldridge (UA officers/ James White) (SCRP)	Ongoing	Implementation of RUS programme of schemes.
<i>High Level Output Specification (HLOS2) for Control Period 5 2014 to 2019</i>	Growth in rail passengers. Forecast growth. Support for RUS.	Future network capacity and services.	Need for early engagement and input into HLOS2 process. Develop strong evidence base. Political buy in.	HLOS2 RUS JLTP3 SWRP MAA	UA officers Chris Aldridge Julian Crow Richard Gibson Phil Dominey	2012	Long term improvements to local rail network. Greater Bristol Rail Plan.

<i>JLTP3 Major Schemes – Portishead</i>	Major scheme to reopen Portishead line.	New local train services.	Continued work and support for proposals to re-open the Portishead line.	RUS HLOS JLTP3 MAA	James Willcock (Chris Aldridge) (Julian Crow)	2012 GRIP Stage 4	Re-opened Portishead line.
<i>JLTP3 Major Schemes – Greater Bristol Metro</i>	Major scheme to enhance local rail services.	Enhanced half hourly cross Bristol train services.	Continued work and support for proposals for the Greater Bristol Metro major scheme.	RUS HLOS JLTP3 MAA	UA officers/ James White (Chris Aldridge) (Julian Crow)	2015	Greater Bristol Rail Plan.
<i>West of England growth in homes, jobs and communities</i>	Core Strategies housing and employment growth. Forecast growth in passengers.	Maximise the potential for rail served development.	Provision for early information and joint working on growth levels and delivery plans, supported by quarterly meetings programme.	RUS HLOS JLTP3 MAA CS DIIP	UA officers (Chris Aldridge) (Julian Crow)	Ongoing	Single focus for development of rail schemes to serve growth in jobs and homes. Greater Bristol Rail Plan.
Long Term 2019+ (Control Period 6+)							
<i>Vision for the future</i>	Core Strategies housing and employment growth. Forecast growth in passengers. High Speed Rail (HSR).	Maximise the potential for travel by rail including expanding the network.	Delivered through HLOS2 and RUS. Need for continued engagement and input into HLOS2 and plans to implement the RUS. Support development of next generation RUS and HLOS2. Inform work of the Great Western Partnership on HSR.	RUS HLOS JLTP3 MAA CS DIIP	UA officers (Chris Aldridge) (Julian Crow)		Ensure a clear, realistic and deliverable vision for rail. Common way forward. South West England and South Wales included in plans for a High Speed Rail Network.

Notes

* See Key Milestones chart in Appendix Three

CS = emerging Core Strategies for West of England unitary authorities

DIIP = Delivery and Infrastructure Investment Plan

HLOS2 = High Level Output Specification

JLTP3 = Joint Local Transport Plan 3 2011 to 2026

Lead officers = Chris Aldridge (Network Rail), Julian Crow (First Great Western), Richard Gibson (CrossCountry), Phil Dominey (South West Trains), James White (West of England Partnership)

MAA = West of England Multi Area Agreement, 2009

RUS = Great Western Route Utilisation Strategy, March 2010

SCRIP = Severnside Community Rail Partnership, Keith Walton

SWRP = South West Rail Prospectus, July 2010

UA = unitary authorities

UA officers (Rail Project Group) = Andy Strong (B&NES), Andy Davies (BCC), James Willcock (NSC), Helen Young/Richard Kemble (SGC)

Draft Rail Action Plan Timeline and Key Milestones

Task Name	Start	Finish	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019+
JLTP3	2011	2026	█	◆ (2) █	◆ (3) █	█	█	█	█	█	█	█	█
JLTP3 Delivery Plan (3 year rolling)	2011	2014	█	◆ (2) █	◆ (3) █	█	◆ (6) █	█	◆ (6) █	█	█	█	█
Network Rail Route Plan K West of England	2010	2014	█	◆ (1) █	◆ (7a) █	◆ (7b) █	◆ (7c) █	█	█	█	█	█	█
Network Rail Control Period 5	2014	2019	█	◆ (8a) █	◆ (8b) █	◆ (8c) █	◆ (8d, e, f) █	◆ (8g) █	█	█	█	█	█
Network Rail Discretionary Fund	2009	2014	█	◆ (9) █	█	█	█	█	█	█	█	█	█
Other plans - to add with dates													
FGW Franchise - to add key dates										◆			
Electrification Great Western Mainline			█	◆ (1) █	█	█	█	█	█	█	◆		
Timetable changes - to add													
Rolling stock - to add													
Route Utilisation Strategy 2010	2009	2019	█	◆ (1) █	█	█	█	█	█	█	█	█	█
HLOS2 to complete			█	█	◆	█	█	█	█	█	█	█	█
Portishead	2014	2017	█	█	◆ (4) █	█	◆ (5) █	█	█	█	█	█	◆
Greater Bristol Metro	2015	2020	█	█	◆	█	◆ (4) █	█	◆ (5) █	█	█	█	█
Core Strategies	2010	2012	◆ (10b) █	◆ (10a, c, d) █	◆ (10c) █	◆ (10d) █	█	█	█	█	█	█	█
Vision for the future - to add dates	2011	2026											

Notes

◆ = key milestone

(1) Comprehensive Spending Review Oct 2010

(2) JLTP3 publication deadline March 2011

(3) JLTP3 possible review autumn 2011

(4) Submission of major scheme bid

(5) Implementation

(6) Delivery Plan review

Network Rail Route Plan K April 2010

(7a) Track renewals Stoke Gifford Junction

(7b) Track renewals Bathampton crossover, Dr Days Junction

(7c) Westerleigh Junction - Barnt Green line speed upgrade

Control Period 5 2014 to 2019 preparation

(8a) Initial Strategic Business Plan June 2011

(8b) High Level Output Specifications July 2012

(8c) Strategic Business Plan January 2013

(8d) Draft determination July 2013

(8e) Response to draft determination September 2013

(8f) Final Determination November 2013

(8g) CP5 Delivery Plan March 2014

Network Rail Discretionary Fund March 2010 update

(9) Bristol to Bath signalling enhancement

Core Strategies

(10a) Bath and North East Somerset draft end 2010

(10b) Bristol examination June 2010

(10c) North Somerset consultation October 2010, examination November 2011

(10d) South Gloucestershire draft August 2010, examination 2012



West of England Partnership

Bath & North East Somerset Council



North Somerset Council

South Gloucestershire Council



North Somerset
South Gloucestershire
Bath and North East Somerset

Memorandum of Understanding

This Memorandum of Understanding is between the local authorities of Bath & North East Somerset, Bristol City, North Somerset and South Gloucestershire who together make up the West of England Partnership and the Health Sector for the Partnership Area through the Directors of Public Health for the area.

The purpose of the Memorandum of Understanding is to promote effective co-ordination and co-operation between the organisations in relation to transport and health. The key principles are of openness, explanation and discussion together with shared responsibility and ownership of problems and solutions. It is not legally binding.

The Health Sector in the West of England Partnership area is currently made up of:

- The Four Primary Care Trusts of NHS Bath and North East Somerset, NHS Bristol, NHS North Somerset, NHS South Gloucestershire
- A large number of Service Providers, which are commissioned by the PCTs to deliver NHS services for local residents. These include major Hospital Trusts, providers of community services, General Practices, dentists, opticians, and pharmacies.

We take health to mean not just the needs of individuals with specific illnesses and conditions, but also the promotion and protection of good health and the reduction of health inequalities, now and in the future.

This is a core duty of the Primary Care Trusts and of subsequent bodies that may result from the 2010 Health White Paper.

It is hereby agreed that:

Strategy

The Memorandum of Understanding partners will collaborate to promote and protect good health through delivery of the goals and ambitions set out in key Government policy documents and Local Development Frameworks.

The Health Sector will be key partners in the production of the four West of England authorities Joint Local Transport Plan 3 and will provide input, expertise and feedback in order to maximise health gains and minimise the acute and chronic disease burden.

The Memorandum of Understanding partners align, where practicable a programme and phasing of schemes for 2011 to 2026 for inclusion in the Delivery Plan of the Joint Local Transport Plan 3 and review programmes for each 3 year implementation phase.

Transport and Health Forum

To promote effective joint collaboration a transport and health forum will be established to seek to ensure that the transport system for the area now and in the future is designed in such a way that it enhances health, wellbeing and prosperity for all residents, and contributes to reducing health inequalities.

It will achieve this by:

- Bringing together relevant expertise and representation from Transport and Health sectors.
- Building strong and constructive working relationships between the Health Sector and the Transport sector.
- Using best available evidence to inform planning and decision-making.
- Using the principles of 'Health Impact Assessment' to inform planning at the earliest stages of option development.
- Including access to health facilities for staff, patients and visitors.
- Producing and monitoring the Action Plan.

The Forum will report to the Joint Transport Executive Committee

Support

Directors of Public Health will provide updates for and attend meetings of the Joint Transport Executive Committee on a twice-yearly basis to consider progress on the Action Plan.

Information and Data collection

Information requests between Memorandum of Understanding partners will be managed as quickly as is reasonable depending on the complexity of the request and information available. Requests are to be as specific as possible.

Communications

A joint framework on communications will be established in order to promote levels of engagement and partnership working between the Memorandum of Understanding partners.

Timescale and review

The Memorandum of Understanding shall come into immediate effect. The West of England Partnership authorities and Health Sector for the West of England area will jointly review the arrangements set out in the Memorandum of Understanding at two yearly intervals.

Dated 17 September 2010



Bristol

Deborah Evans



North Somerset

Becky

Bath & North East Somerset Council

Chris Bernal

North Somerset Council

[Signature]



Bath and North East Somerset

Parvula Akerman



South Gloucestershire

Nakabe Field



Bristol City Council

[Signature]

South Gloucestershire Council

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South Gloucestershire Council

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