

**SESTRAN PARTNERSHIP BOARD MEETING**

**Dean of Guild Courtroom, City Chambers, Edinburgh, EH1 1YJ**  
**Or via Microsoft Teams**  
**10:00am Friday 6<sup>th</sup> December 2024**

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**09:30 TEA/COFFEE**  
**10:00 PARTNERSHIP BOARD**  
**11:30 BREAK**  
**11:45 PARTNERSHIP BOARD**  
**13:00 LUNCH**

**AGENDA**

**Page No's**

- 1. ORDER OF BUSINESS**
- 2. APOLOGIES**
- 3. DECLARATIONS OF INTEREST**

**AGENDA A – POINTS FOR DECISION**

- |            |   |            |
|------------|---|------------|
| <b>A1.</b> | <b>CHAIR'S INTRODUCTION</b> – Cllr Sally Pattle   |            |
| <b>A2.</b> | <b>MINUTES</b><br><u>For Approval</u>   |            |
|            | (a) Partnership Board – Friday 27 <sup>th</sup> September 2024  | <b>6</b>   |
|            | (b) Performance and Audit Committee – 29 <sup>th</sup> November 2024  | <b>13</b>  |
| <b>A3.</b> | <b><u>FINANCE REPORTS</u></b>   |            |
|            | (a) Indicative Financial Plan 2025/26 to 2026/27 - Report by Richard Lloyd-Bithell/Iain Shaw                    | <b>17</b>  |
|            | (b) Finance Officer's Report– Report by Iain Shaw   | <b>24</b>  |
|            | (c) 2023/24 Annual Audit Report and Audited Annual Accounts 2023/24 – Report By Richard Lloyd-Bithell/Iain Shaw | <b>30</b>  |
| <b>A4.</b> | <b>PARTNERSHIP DIRECTOR'S UPDATE</b> – Presentation by Brian Butler   |            |
| <b>A5.</b> | <b>PEOPLE AND PLACE PLAN</b> – Report by Michael Melton   | <b>105</b> |
| <b>A6.</b> | <b>REGIONAL BUS STRATEGY</b> – Report by Rachael Murphy   | <b>193</b> |
| <b>A7.</b> | <b>COMMUNICATIONS STRATEGY</b> – Presentation by Sarah Junik  |            |
| <b>A8.</b> | <b>CLIMATE CHANGE DUTIES REPORT</b> – Report by Rebecca Smith   | <b>198</b> |

**A9. PROGRAMME OF MEETINGS 2025 – Report by Brian Butler 212**

**A10. DATE OF NEXT MEETING:**

The date of the next meeting is **Friday 14<sup>th</sup> March 2025**

**AGENDA B – POINTS FOR NOTING**

**B1. CONSULTATIONS UPDATE 216**

**B2. MINUTES**

B2.1 Equalities and Access to Healthcare Forum – 26<sup>th</sup> September 2024 **217**

B2.2 Integrated Mobility Forum – 10<sup>th</sup> October 2024 **223**

B2.3 Logistics and Freight Forum – 21<sup>st</sup> November 2024 **229**

**B3. PEOPLE AND PLACE GRANT AWARDS 232**

**B4. PROJECTS AND STRATEGY PERFORMANCE REPORT 234**

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29 November 2024

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**Partnership Board Agenda Briefing Note - Friday 6<sup>th</sup> December 2024**

<u>Item</u>	<u>Paper</u>	<u>Board Action</u>
<u>A3(a)</u>	<p><b><u>Indicative Financial Plan 2025/26 to 2026/27</u></b></p> <p>Iain Shaw will present this report, which provides an update on the emerging revenue budget for 2025/26 and an indicative revenue budget for 2026/27.</p> <p>It is recommended that the Partnership Board:</p> <ul style="list-style-type: none"> <li>• notes the financial planning assumptions for the period 2025/26 to 2026/27</li> <li>• notes that financial planning for 2025/26 to 2026/27 will continue to be developed for approval of a revenue budget by the Partnership at its meeting in March 2025</li> <li>• notes that the proposed budget is subject to a number of risks. All income and expenditure of the Partnership will continue to be monitored closely with updates reported to each Partnership meeting.</li> </ul>	<u>For noting</u>
<u>A3(b)</u>	<p><b><u>Finance Officer's Report</u></b></p> <p>Iain Shaw will present this report, which updates the Board on performance against budget in the current financial year to the end of October, and provides a projection of full year performance.</p> <p>It is recommended that the Partnership Board notes:</p> <ul style="list-style-type: none"> <li>• the forecast overspend on the Core revenue budget of £14,000, which is principally due to a reduction in Scottish Government grant funding and will be met by a drawdown from the Partnership's unallocated reserve;</li> <li>• the forecast underspend on the Projects budget of £50,000, after future lease commitments are met;</li> <li>• the proposed re-alignment of the Projects 2024/25 budget.</li> </ul>	<u>For Noting</u>
<u>A3(c)</u>	<p><b><u>2023/24 Annual Audit Report and Audited Annual Accounts 2023/24</u></b></p> <p>Iain Shaw will present this report.</p>	<u>For Noting and Approval</u>

	<p>This report presents the 2023/24 Annual Audit Report by Audit Scotland and the Audited Annual Accounts for the year ended 31st March 2024.</p> <p>It is recommended that the Partnership Board:</p> <ul style="list-style-type: none"> <li>• Note the Annual Audit Report to members of South East of Scotland Transport Partnership and the Controller of Audit</li> <li>• Authorise the Audited Annual Accounts for signature</li> </ul>	
<u>A4</u>	<p><b><u>Partnership Director's Update</u></b></p> <p>Brian Butler will provide an update on a range of subjects not covered in the various reports or other presentations that the Board will enjoy today.</p>	<u>For noting</u>
<u>A5</u>	<p><b><u>People and Place Plan</u></b></p> <p>Michael Melton will present an outline of the People and Place Delivery Plan, including work carried out to date, future plans, and the management of grant funds in 2025/26. Approval is also sought for grant eligibility criteria and the assessment process for the related grant funds.</p> <p>The Partnership Board is asked to:</p> <ul style="list-style-type: none"> <li>• Note and discuss the content of this report and approve the People and Place Delivery Plan at Appendix 1</li> <li>• Delegate to the Partnership Director the setting of the fund values as noted at paragraph 4.2 for Grants to Local Authorities, Grants to Third Parties, and the Community Grant Fund.</li> <li>• Approve the eligibility and assessment criteria at Appendix 2 for grants to third parties, and delegate to the Partnership Director the ability to vary the project section of the eligibility criteria as set out in paragraph 4.4.3</li> <li>• Approve the eligibility and assessment criteria at Appendix 3 for the community grant fund and delegate to the Partnership Director the ability to vary these criteria to support alignment with SPT and Tactran as set out in paragraph 4.5.3</li> </ul>	<u>For Noting and Approval</u>

<u>A6</u>	<p><b><u>Regional Bus Strategy</u></b></p> <p>Rachael Murphy will provide an update on the progress of the SEStran Regional Bus Draft Strategy. She will give you a sneak peak of some videos that will help to explain our plans to our partner local authorities.</p> <ul style="list-style-type: none"> <li>• Note the video summaries of the policy areas and provide feedback at the December 2024 board.</li> <li>• Respond to follow-up surveys emailed to members</li> <li>• Continue engaging with and supporting the strategy process</li> </ul>	<u>For Noting</u>
<u>A7</u>	<p><b><u>Communications Strategy</u></b></p> <p>Our new Communications and Marketing Officer, Sarah Junik, will provide some insight to her early observations and plans to raise SEStran’s profile by improving our stakeholder engagement.</p>	<u>For noting</u>
<u>A8</u>	<p><b><u>Climate Change Duties</u></b></p> <p>Rebecca Smith will provide members with a summary of SEStran’s carbon emissions for 23/24, explain changes to the previous year, and provide a summary of targets for 2024/25.</p> <p>It is recommended that the Partnership Board:</p> <ul style="list-style-type: none"> <li>• Note the contents of the report</li> </ul>	<u>For Noting</u>
<u>A9</u>	<p><b><u>Programme of Meetings 2025</u></b></p> <p>This paper presents the proposed dates for the Partnership Board meetings in 2025, along with the full schedule of SEStran meetings contained in <b>Appendix 1</b> of the report.</p> <p>It is recommended that the Board:</p> <ul style="list-style-type: none"> <li>• Approves the proposed programme of meetings for 2025</li> <li>• Notes the hosting arrangements for the future meetings</li> </ul>	<u>For Approval and Noting</u>

## SEStran Partnership Board Minutes

10.00am, Friday 27 September 2024

Dean of Guild Court Room, City Chambers, Edinburgh, and Microsoft Teams

<u>Present</u>	<u>Name</u>	<u>Organisation Title</u>
	Cllr Russell Imrie (Vice Chair - In accordance with Standing Order 6.4 Cllr Russell Imrie presided for items A1, A2 and A3 of this meeting)	Midlothian Council
	Cllr Sally Pattle (Chair) (presided for items A4 to B3)	West Lothian Council
	Cllr Dijkstra-Downie	City of Edinburgh Council
	Cllr Kayleigh O'Neill	City of Edinburgh Council
	Cllr Iain Whyte	City of Edinburgh Council
	Cllr Fiona Law	Clackmannanshire Council
	Cllr John McMillan	East Lothian Council
	Cllr Margaret Anslow	Falkirk Council
	Cllr Ian Cameron	Fife Council
	Cllr Derek Glen	Fife Council
	Cllr James Leslie	Fife Council
	Cllr Colin Cassidy	Midlothian Council
	Cllr Jenny Linehan	Scottish Borders Council
	Geoff Duke	Non-Councillor Member
	Callum Hay	Non-Councillor Member
	Simon Hindshaw	Non-Councillor Member
	John Scott	Non-Councillor Member
	Kate Sherry	Non-Councillor Member
	Doreen Steele	Non-Councillor Member
	Paul White	Non-Councillor Member

## In Attendance

Andrew Rose (Clerk)	City of Edinburgh Council
Iain Shaw	City of Edinburgh Council
Jamie Robertson	City of Edinburgh Council
John Mitchell	Fife Council
David Maule	West Lothian Council
Iona Chandler	Urban Tide
James McLeod	Urban Tide
Brian Butler	SEStran
Angela Chambers	SEStran
Cheryl Fergie	SEStran
Keith Fisker	SEStran
Andrew Ferguson	SEStran
Beth Harley-Jepson	SEStran
Michael Melton	SEStran
Rebecca Smith	SEStran

## Apologies for Absence

Cllr Stephen Jenkinson	City of Edinburgh Council
Cllr Jane Cox	Scottish Borders Council
Cllr Tom Conn	West Lothian Council
Linda Bamford	Non-Councillor Member
Alastair Cooper	Non-Councillor Member

## **A1. Order of Business**

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The Deputy Chair indicated that the item regarding Transport to Healthcare would be taken as the first item of business.

## **A2. Transport to Healthcare**

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The Board received a presentation from the Senior Partnership Manager setting out the context for the project, detailing some of the work undertaken to date, outlining a number of common themes which have emerged from the work in relation to transport to healthcare, and reporting on future opportunities. Thereafter, Iona Chandler and James McLeod from Urban Tide gave a presentation and a demonstration of an early version of a project funded by the DfT's Rural Accelerator Project Fund. Urban Tide have developed an online tool which enables users of health services to identify transport options to the hospital or facility.

Currently, this tool is being piloted in Fife, but feedback and ideas for improvement are invited before it is rolled out across the country.

## **Decision**

To note the presentation by the Senior Partnership Manager, and demonstration of the online tool currently being piloted in Fife.

(Reference – Presentation by the Senior Partnership Manager)

## **A3. Appointments**

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The Board considered a report by the Partnership Secretary as regards the following appointments of Members:

- (a) Chairperson
- (b) Deputy Chairpersons(s)

The Partnership Director also verbally indicated that changes to membership of the Performance and Audit Committee were also required, as well as to the Chair of the Freight Forum.

The Deputy Chair also took the opportunity to welcome the new SEStran Board members Cllr Stephen Jenkinson and Cllr Kayleigh O'Neill from City of Edinburgh Council and Cllr Iain Cameron and Cllr James Leslie from Fife Council.

## **Decision**

- 1) To agree that Councillor Sally Pattle be appointed Chair of the Board, following which, Councillor Pattle took the Chair.
- 2) To agree that Councillors Dijkstra-Downie and John McMillan be appointed Deputy Chairs.
- 3) To note that, due to (a) the resignation of former Councillor Scott Arthur, City of Edinburgh Council, and (b) Councillor Sally Pattle, West Lothian Council, becoming Chair of the Board and therefore unable to be a member of the Performance and Audit Committee, alternative members would need to be found for the Performance and Audit Committee from those two respective councils, with these appointments to be formally approved at the next meeting of the Board.
- 4) To note that interest was sought from Board members for the role of Chair of the Freight Forum.

(Reference – report by the Secretary, submitted.)

## **A4. Minutes**

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### **Decision**

- 1) To agree the minute of the SEStran Partnership Board of 21 June 2024 as a correct record.
- 2) To agree the minute of the SEStran Performance and Audit Committee of 13 September 2024 as a correct record.



## A5. Finance Officer's Report

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The Board considered a report by the Treasurer providing the first update on the financial performance of the Partnership's Core and Projects budgets for 2024/25, in accordance with the Financial Regulations of the Partnership. The report presented an analysis of financial performance to the end of July 2024, and reminded the Board that the Partnership's Core and Projects budgets for 2024/25 had been approved by the Partnership on 15<sup>th</sup> March 2024.

During consideration of this matter the Board expressed concern that, for the second successive year, the Partnership's appointed external auditor had been unable to complete its audit of the annual accounts within the required timescale. The Partnership Director provided a verbal update to the Board on discussion which had been held with Audit Scotland on this matter.

### Decision

- 1) To note the forecast overspend on the Core revenue budget of £29,000 which is principally due to a reduction in Scottish Government grant funding and would be met by a drawdown from the Partnership's unallocated reserve;
- 2) To note that expenditure is forecast to be within budget for Project expenditure, and
- 3) To note the proposed re-alignment of the Projects 2024/25 budget, subject to the conclusion of the 2023/24 external audit.

(Reference – report by the Treasurer, submitted.)

## A6. Partnership Director's Update

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The Partnership Director provided a presentation to the Board on (a) current and future financial challenges and opportunities, (b) update on work with national governments regarding continuity of funding and of the partnership model, (c) exploration of a collaborative approach to the development of an Electric Vehicle (EV) charging infrastructure, (d) an update from a meeting of Regional Transport Partnership Chairs and Transport Scotland, and (e) an update on organisational matters.

### Decision

To note the Partnership Director's Update Presentation

(Reference – Presentation by Partnership Director, submitted)

## A7. Go-SESTRAN

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The Board considered a report by the Projects Officer reminding it that it had considered a report at its meeting held on 15 March 2024 and had noted that a further report would be received detailing progress against key success criteria. The report provided an updated financial position for the project and asked the Board to consider the continuation of Go-SEStran.

### Decision

- 1) To agree to the continuation of Go-SEStran as part of the Integrated Mobility Partnership due to the significant progress on funding made as outlined in the report, and achieving two of the three criteria presented at the March 2024 Board.
- 2) To authorise the Partnership Director to enter into such contractual agreements as are required to progress the GoSEStran and VoyagAR projects to their fullest extent possible within available funding levels, and
- 3) To agree to receive regular progress updates via the Projects Update at the Performance and Audit Committee, with such Board reporting as is necessary as the projects progress.

(Reference – Report by the Projects Officer, submitted)

## **A8. Annual Report and Business Planning**

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The Board considered a report by the Senior Partnership Manager which sought to update the Board on the draft Annual Report and Business Plan which was under way for the Partnership. The report also reminded the Board that the draft Annual Report for 2023/24 and the Business Plan for 2024/25 had been approved for publication at its meeting in June 2024, subject to consideration of any comments from Board members following that meeting and reporting that no comments had been received by the agreed deadline of 15 August. Accordingly, Officers were currently finalising the publication of the report for distribution.

### **Decision**

To note the contents of the report and approve the planning process for the future development and publication of the Partnerships annual report and business plan.

(Reference – Report by the Senior Partnership Manager, submitted)

## **A9. Regional Transport Strategy Delivery Plan**

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The Senior Partnership Manager gave a presentation reminding the Board that the Delivery Plan will provide a mechanism to assess and prioritise regional projects that are required over the next ten years to realise the ambitions of the Regional Transport Strategy and to support the economic and net-zero ambitions of the Regional Prosperity Framework. The presentation outlined the Plan's objectives, the stakeholders (and routes for engagement with them), and details of the project plan for development of the Delivery Plan.

During its consideration of this matter, the Board also heard from the Partnership Director in response to a question from Members on the purpose of the Scottish Government's discussion paper on the Infrastructure Levy in Scotland, and on how Regional Transport Partnerships had discussed making submissions to the ongoing consultation.

### **Decision**

To note the presentation by the Senior Partnership Manager.

To request that the Partnership Director makes a submission as part of the Scottish Government's consultation of the Infrastructure Levy in Scotland discussion paper, either unilaterally or as part of a joint submission by the Scottish Regional Transport Partnerships.

(Reference – Presentation by the Senior Partnership Manager, submitted)

## A10. Date of Next Meeting

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### Decision

To note that the date of the next meeting was scheduled for 10:00am on Friday 6<sup>th</sup> December 2024.

Prior to the following items of business which were reports purely for information purposes and for noting, the Chair requested that, going forward, the Part B agenda items would be taken as read but, should any Board members wish to ask any questions, make comment or have discussion on any of these reports, they should notify the Secretary in advance of the meeting.

## **B1. People and Place Programme Grant Awards**

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The Board received a report from the Programme Manager detailing variations to the SEStran People and Place grant awards to the Board.

### **Decision**

To note the content of the report and the variations to the SEStran People and Place grant awards as detailed at Appendix 1 to the report.

(Reference – Report by the Programme Manager, submitted)

## **B2. Projects and Strategy Performance**

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The Board received a report from the Programme Manager, as previously reviewed, discussed and noted by the Performance and Audit Committee at its meeting held on 13 September 2024, which provided an update on the performance of the Partnership's strategy and project workstreams over the previous quarter.

### **Decision**

To note the progress recorded by the project in the past quarter as summarised in the Appendix to the report.

(Reference – Report by the Programme Manager, submitted)

## **B3. Public Sector Reform (Scotland) Act 2020**

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The Board received a report from the Business Support Officer informing it that Regional Transport Partnerships are included in the schedule of the Public Services Reform (Scotland) Act 2010 and that this requires annual publication of certain information. The report advised the Board of the information to be published.

### **Decision**

To note the content of the material for publication under the Public Services Reform (Scotland) Act 2010 and as detailed in Appendix 1 of the report.

(Reference – Report by the Business Support Officer, submitted)

**PERFORMANCE & AUDIT COMMITTEE**

**Virtual Meeting via Microsoft Teams  
on Friday 29 November 2024  
1.00pm**

<b>PRESENT:</b>	<u>Name</u>	<u>Organisation Title</u>
	Councillor Imrie (Chair)	Midlothian Council
	Councillor Law	Clackmannanshire Council
	Councillor Linehan	Scottish Borders Council
	Simon Hindshaw	Non-Councillor Member
	Doreen Steele	Non-Councillor Member
	John Scott	Non-Councillor Member

<b>IN ATTENDANCE:</b>	<u>Name</u>	<u>Organisation Title</u>
	Brian Butler	SEStran
	Cheryl Fergie	SEStran
	Christopher Gardner	Audit Scotland
	Andrew Henderson (Clerk)	City of Edinburgh Council
	Sarah Junik	SEStran
	Marta Kuzma	Audit Scotland
	Sandra Lavergne	SEStran
	Michael Melton	SEStran
	Iain Shaw	City of Edinburgh Council
	Tarryn Wilson-Jones	Audit Scotland

**Action by**

**A1. ORDER OF BUSINESS**

It was confirmed that there was no change to the order of business.

**A2. APOLOGIES**

Apologies were submitted on behalf of Councillor Glen (Fife Council), Councillor John McMillan (East Lothian Council) and Callum Hay (Non-Councillor Member).

**A3. DECLARATION OF INTERESTS**

None.

**A4. MINUTES**

To approve the minute of the Performance and Audit Committee of

Friday 13 September 2024 as a correct record.

## **A5. P&A COMMITTEE ARRANGEMENTS**

An overview of the required appointments to the Committee and a proposal to set up a new Sub-Group which will provide additional scrutiny around project and strategy delivery was presented.

### **Decision**

- 1) To note the position regarding future appointments to the Committee; and
- 2) To agree the formation of the Project and Strategy Delivery Oversight Sub Group as set out in section 3

(Reference – report by the Programme Manager, submitted)

## **A6. FINANCE REPORTS**

### **(a) Audited Annual Accounts 2023-2024**

The draft Audited Annual Accounts for the year ended 31st March 2024 were presented.

### **Decision**

To note the draft audited annual accounts and the Auditor's opinion in the audit certificate.

(Reference – report by the Treasurer, submitted)

### **(b) Indicative Financial Plan 2025/26 to 2026/27**

An update on financial planning being progressed for the 2025/26 revenue budget and an indicative plan for 2026/27.

### **Decision**

- 1) To note the financial planning assumptions for the period 2025/26 to 2026/27;
- 2) To note that financial planning for 2025/26 to 2026/27 will continue to be developed for approval of a revenue budget by the Partnership at its meeting in March 2025; and
- 3) To note that the proposed budget is subject to a number of risks. All income and expenditure of the Partnership will continue to be monitored closely with updates reported to each Partnership meeting.

(Reference – report by the Treasurer, submitted)

### **(c) Finance Officer's Report**

The second update on the financial performance of the Partnership's Core and Projects budgets for 2024/25, in accordance with the Financial Regulations of the Partnership was presented along with an. This report analysis of financial performance to the end of October 2024.

#### **Decision**

- 1) To note the forecast overspend on the Core revenue budget of £14,000, which is principally due to a reduction in Scottish Government grant funding and will be met by a drawdown from the Partnership's unallocated reserve;
- 2) To note the forecast underspend on the Projects budget of £50,000, after future lease commitments are met; and
- 3) To note the proposed re-alignment of the Projects 2024/25 budget.

(Reference – report by the Treasurer, submitted)

## **A7. PROJECTS AND STRATEGY PERFORMANCE**

An update on the Partnership's strategy and project workstreams over the last quarter was presented. The project report sits alongside the new project lifecycle management process, that will link directly from the business plan to a project outline document, to a project initiation document and, once this has been approved, into this project progress report. This process will allow us to report to the Committee of progress against project objectives, with the aim of this commencing for all projects from the start of 25/26.

#### **Decision**

- 1) To note progress recorded by project in the past quarter;
- 2) To note officers would speak to Scottish Borders Council about the work being done in Hawick on e-bikes; and
- 3) To note officers would speak to stakeholders at East Lothian Community Hospital about issues with the carpark being used as a park and ride.

(Reference – report by the Programme Manager, submitted)

**A8. RISK MANAGEMENT**

The six monthly update of the SEStran risk register was presented.

**Decision**

- 1) To note the contents of the report, and;
- 2) To note that a final version of the Risk Register will be referred to the Partnership Board for noting.

**A9. DATE OF NEXT MEETING**

Friday 28<sup>th</sup> February 2024



## Indicative Financial Plan 2025/26 and 2026/27

### 1. Introduction

- 1.1 This report provides an update on financial planning being progressed for the 2025/26 revenue budget and an indicative plan for 2026/27.

### 2. Main Report

#### Scottish Government Budget 2025-26

- 2.1 The Scottish Government Draft Budget is scheduled to be announced on 4 December 2024.
- 2.2 It is anticipated Scottish Government funding to Regional Transport Partnerships (RTPs) for 2024/25 will be advised in early 2025.

#### Financial Planning 2025/26 and 2026/27

- 2.3 The planning assumptions presented to the Partnership on 15th March 2024 have been updated.
- 2.4 On 26<sup>th</sup> March 2024, Transport Scotland advised the Partnership of a 5% reduction in the Partnership's annual grant funding for core activity in 2024/25 - a reduction of £39,100. Financial planning is currently based on no further change in the Transport Scotland revenue grant for 2025/26, with a grant of £743,100 included in the financial plan. This is identified as a financial planning risk.
- 2.5 In 2024/25, the Partnership was awarded additional funding of £5.326m from Transport Scotland to progress the People and Places Programme (PPP). Confirmation has yet to be received of Programme continuation and funding for 2025/26.
- 2.6 In recent years, the Partnership's Projects budget has included over £400,000 of expenditure funded by the Scottish Government's Active Travel Fund. This funding ceased in 2024/25 as the objectives of the Fund became part of the People and Places Programme funding.
- 2.7 Until confirmation of 2025/26 funding for the People and Places Programme, the indicative Project budget estimates for 2025/26 and 2026/27 are potentially understated. An update of the Projects budget will be reported to the Partnership, following confirmation of additional Scottish Government funding.
- 2.8 Subject to confirmation of project budgets, it is anticipated that a proportion of employee costs will be recharged to projects initiated and progressed towards realising the Regional Transport Strategy.

- 2.9** The financial plans make provision for a pay award of 3% in 2025/26 and a further 3% in 2026/27.
- 2.10** Financial planning has been updated for the change in employers National Insurance contribution rates announced by the Chancellor of the Exchequer in the UK Government Budget of 30<sup>th</sup> October 2024. An additional Council requisition may require to be considered when the final cost and funding arrangements for the increase in National Insurance contributions is confirmed.
- 2.11** The 2023 Actuarial Valuation for Lothian Pension Fund recommended a reduction of 6.3% in employer contribution rates from 2024/25 to 2026/27. The financial plans reflect the revised employer's contribution rate of 26.8%.
- 2.12** Other budget estimates have been updated to reflect forecast future costs.
- 2.13** Financial planning for 2025/26 and 2026/27 is based on receiving £743,100 of grant from Transport Scotland and £190,000 from constituent council requisitions. This represents a stand-still in Transport Scotland grant and Council requisitions.
- 2.14** The Partnership was on track to spend the full Projects budget during 2023/24 until the requirement to deliver the Scottish Government funded 'People and Place Plan' emerged in December 2023. As reported in the Finance Officer's report elsewhere on this Agenda, this resulted in the postponement of some project work and carry forward of £187,000 of projects budget to 2024/25. This is forecast to be fully spent in 2024/25.
- 2.15** An underspend of £50,000 is forecast for Bus Strategy Development for 2024/25. This is forecast to be carried forward and fully spent in 2025/26.
- 2.16** An analysis of the indicative Core budget for 2025/26 and 2026/27 is shown in Appendix 1.
- 2.17** A roll forward of Project budget activity for 2025/26 is shown in Appendix 2. An indicative Projects budget will be developed for 2026/27 when further funding information is available.
- 2.18** Based on updated Core budget costs, a roll forward of the indicative Project financial plan for 2025/26 and 2026/27 and full spend of the forecast Projects underspend from 2024/25 in 2025/26, there is a net funding shortfall of £44,000 in 2025/26. This is shown in Appendix 3.
- 2.19** Appendix 3 shows all budgeted expenditure and income since 2019/20. Council requisitions reduced by 5% in 2017/18 from £200,000 to £190,000.
- 2.20** In accordance with the provisions of the Transport Scotland (2019) Act, the Partnership has agreed a Reserves Policy and established an unallocated General Fund reserve of £45,000, based on 5% of the core revenue budget.
- 2.21** At 1<sup>st</sup> April 2024, the Partnership has an unallocated General Fund Reserve of £135,000. Based on the forecast requirement for drawdown of £14,000 during 2024/25, the Partnership's unallocated General Fund Reserve is forecast to be £121,000 at 1<sup>st</sup> April 2025.

**2.22** In addition to the carry forward noted at paragraph 2.14, budget of £106,000 has been carried forward from 2023/24 to meet future lease cost commitments for an Active Travel Network project. This expenditure is fully committed.

**2.23** A risk assessment for 2025/26 is included at Appendix 4.

### **3 Next Steps**

**3.1** The Partnership’s Core and Projects budgets will continue to be developed to achieve expenditure within available funding, prior to a budget for 2025/26 being presented to the Partnership Board for approval at its meeting in March 2025.

**3.2** The report to be presented to the Partnership Board in March 2025 will include a financial sensitivity analysis.

### **4 Recommendation**

**4.1** It is recommended that the Partnership notes:

**4.1.1** the financial planning assumptions for the period 2025/26 to 2026/27;

**4.1.2** financial planning for 2025/26 to 2026/27 will continue to be developed for approval of a revenue budget by the Partnership at its meeting in March 2025;

**4.1.3** the proposed budget is subject to a number of risks. All income and expenditure of the Partnership will continue to be monitored closely with updates reported to each Partnership meeting.

### **5 Background Reading/External References**

**5.1** [Revenue Budget 2024/25 and Indicative Financial Plan 2025/26](#) – report to South East Scotland Transport Partnership 15<sup>th</sup> March 2024

**Richard Lloyd-Bithell**

Treasurer

29th November 2024

**Appendix** Appendix 1 – Indicative Core Budget 2025/26 to 2026/27

Appendix 2 – Projects – Indicative Activity 2025/26

Appendix 3 – Summary of Revenue Budget 2019/20 – 2026/27

Appendix 4 - Risk Assessment 2025/26

**Contact** [iain.shaw@edinburgh.gov.uk](mailto:iain.shaw@edinburgh.gov.uk)

Policy Implications	There are no policy implications arising as a result of this report.
Financial Implications	There are no financial implications arising.
Equalities Implications	There are no equality implications arising as a result of this report.
Climate Change Implications	There are no climate change implications arising due to this report.

## Indicative Core Budget 2025/26 and 2026/27

	Approved Budget 2024/25	Indicative Budget 2025/26	Indicative Budget 2026/27
	£000	£000	£000
<b>Employee Costs</b>			
Salaries	499	510	530
National Insurance	57	68	71
Pension Fund	134	135	141
Recharges	0	0	(19)
Training & Conferences	10	8	8
Interviews & Advertising	2	2	2
	<b>702</b>	<b>723</b>	<b>733</b>
<b>Premises Costs</b>	<b>18</b>	<b>21</b>	<b>21</b>
<b>Transport</b>	<b>8</b>	<b>5</b>	<b>5</b>
<b>Supplies and Services</b>			
Communications & Computing	48	48	48
Hosted ICT – Novus FX	44	45	45
Printing, Stationery & General Office Supplies	7	7	7
Insurance	7	7	7
Equipment, Furniture, Materials, Miscellaneous	4	4	4
	<b>110</b>	<b>111</b>	<b>111</b>
<b>Support Services</b>			
Finance	31	31	31
Legal Services / HR	7	7	7
	<b>38</b>	<b>38</b>	<b>38</b>
<b>Corporate &amp; Democratic</b>			
Clerks Fees	12	12	12
External Audit Fees	12	12	12
Members Allowances and Expenses	1	1	1
	<b>25</b>	<b>25</b>	<b>25</b>
<b>Interest</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Gross Expenditure</b>	<b>901</b>	<b>923</b>	<b>933</b>
<b>Funding</b>			
Scottish Government Grant	(711)	(733)	(743)
Council Requisitions	(190)	(190)	(190)
<b>Total Funding</b>	<b>(901)</b>	<b>(923)</b>	<b>(933)</b>

## Projects – Indicative Activity 2025-26

Service	2024/25	2025-26		
	Net Budget £'000	Expenditure £'000	Income £'000	Net Expenditure £'000
Sustainable Travel	25			
Active Travel	3			
Bus Strategy Development	75			
Bus Strategy Development – carry forward to 2025/26	(50)	50		50
Regional Transport Strategy	20	18		18
Transport Appraisal	8			
GO e-BIKE	49	10		10
Thistle Assistance	6	30	(24)	6
Consultancy support	22			
Equalities Access to Healthcare	5	10		10
EV Strategy	35			
Freight Strategy	10			
Real-Time Passenger Information System	0	25	(15)	10
Carried forward from 2023/24	(187)			
<b>People and Places</b>				
Revenue projects	1,914			
Capital projects	3,412			
<b>Total</b>	<b>5,347</b>	<b>143</b>	<b>(39)</b>	<b>104</b>

**Summary of Revenue Budget 2019/20 – 2026/27**

	19/20	20/21	21/22	22/23	23/24	24/25	25/26
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Core	584	581	663	619	774	876	923
Projects	690	1,080	809	907	713	275	143
People and Places						5,326	
<b>Total Budget</b>	<b>1,274</b>	<b>1,661</b>	<b>1,472</b>	<b>1,526</b>	<b>1,487</b>	<b>6,477</b>	<b>1,066</b>
<b>External Funding</b>							
EU Grants	82	142	106	210	26	100	0
Other income	220	547	394	344	489	154	39
People and Places						5,326	
<b>Total External Funding</b>	<b>302</b>	<b>689</b>	<b>500</b>	<b>554</b>	<b>515</b>	<b>5,580</b>	<b>39</b>
Scottish Government	782	782	782	782	782	743	743
Council Requisition	190	190	190	190	190	190	190
<b>Total Funding</b>	<b>1,274</b>	<b>1,661</b>	<b>1,472</b>	<b>1,526</b>	<b>1,487</b>	<b>6,513</b>	<b>972</b>
<b>Net Position – Surplus (+ve)/ Shortfall (-ve)</b>						<b>36</b>	<b>-94</b>

**Carry Forward (+ve) /Drawdown Required (-ve)**

<b>Core</b>	<b>-14</b>	<b>10</b>
<b>Projects</b>	<b>50</b>	<b>-104</b>
<b>Projects budget carried forward from 2024/25</b>		<b>50</b>
<b>Net Position – Surplus (+ve)/ Shortfall (-ve)</b>	<b>36</b>	<b>-44</b>

Risk Description	Existing Controls
<p><b>Pay awards</b> The indicative budget makes provision for a pay award of up to 3% in 2025/26. An uplift of 1% in pay award equates to an increase of £6,964.</p>	<p>Alignment with Local Government Pay Policy.</p>
<p><b>Inflation</b> There is a risk that the indicative budget does not adequately cover price inflation and increasing demand for services.</p>	<p>Allowance made for specific known price inflation. Budgets adjusted in line with current cost forecasts.</p>
<p><b>Pension Fund Contributions</b> The value of the Partnership's pension fund was restricted to 'Nil' at 31 March 2024, following proper accounting practice. The actual surplus may lead to a decrease in future employer's pension fund contributions.</p>	<p>Following Lothian Pension Fund's Triennial Actuarial Review in 2023, Partnership employer pension fund contribution rates are now confirmed at 26.8% until 31 March 2027.</p>
<p><b>Funding Reductions</b> Reduction in funding from Scottish Government and/or council requisitions.</p> <p>There is a risk that current levels of activity / staffing cannot be maintained due to funding constraints and that the Partnership will incur staff release costs.</p>	<p>Continue to seek to source external funding.</p> <p>Recruitment control and additional sources of external funding for activities aligned to the Partnership's objectives to supplement resources.</p>

## Finance Officer's report

### 1. Introduction

1.1 This report presents the second update on the financial performance of the Partnership's Core and Projects budgets for 2024/25, in accordance with the Financial Regulations of the Partnership. This report presents an analysis of financial performance to the end of October 2024.

1.2 The Partnership's Core and Projects budgets for 2024/25 were approved by the Partnership on 15th March 2024.

### 2. Core Budget

2.1 The Core budget provides for the day-to-day running costs of the Partnership and includes employee costs, premises costs and supplies and services. The approved Core budget is £901,000. Details of the Core budget are provided in Appendix 1.

2.2 Cumulative expenditure for the seven months to 31<sup>st</sup> October 2024 was £487,000. This is within the Core budget resources available for the period.

2.3 Estimates have been updated to reflect current expenditure commitments. The forecast includes provision of £24,000 for pay award of 3.6%, in line with the local government pay award.

2.4 It is projected that net expenditure for the year will be £14,000 more than budget. This will be met by drawdown from the Partnership's unallocated reserve.

2.5 The overspend is due to a 5% reduction in the 2024/25 revenue grant received from Transport Scotland (£39,000). This funding shortfall is partly offset by:

2.5.1 Employee costs recharged to the People and Places Project (£20,000);

2.5.2 Forecast underspend on employee costs (£3,000).

2.5.3 Other non-employee cost underspends (£2,000).

### Projects Budget

2.6 The approved Projects budget is detailed in Appendix 2.

2.7 The Partnership was on track to spend the full Projects budget during 2023/24 until the requirement to deliver the Scottish Government funded 'People and Place Plan' emerged in December 2023. This necessitated the short-term redeployment of key staff to engage intensively with Transport Scotland and other stakeholders for the remainder of 2023/24. This resulted in the postponement of some project work and carry forward of £187,000 of projects budget to 2024/25.



- 2.8** Budget of £106,000 has also been carried forward from 2023/24 to meet future lease cost commitments for an Active Travel Network project. This expenditure is fully committed.
- 2.9** Following confirmation of the 2023/24 outturn, a review and re-alignment has been undertaken of the Projects budget to reflect current and planned activity. The re-alignment is shown in Appendix 2.
- 2.10** An underspend of £50,000 is forecast for Bus Strategy Development for 2024/25.
- 2.11** Expenditure on both the core and projects budgets will be subject of ongoing review for the remainder of 2024/25. The Partnership's Reserves Policy will be applied when reviewing the year-end outturn.

**Cash Flow**

- 2.12** The Partnership maintains its bank account as part of the City of Edinburgh Council's group of bank accounts. Cash balances are managed by the Council and are offset by expenditure incurred by the City of Edinburgh Council on behalf of the Partnership.

An update of month-end balances is shown in the following table:

<b>Date</b>	<b>Balance due to SEStran(+ve) /due by SEStran (-ve)</b>
	<b>£</b>
30 April 2024	+ 727,711
31 May 2024	+ 620,534
30 June 2024	+ 662,946
31 July 2024	+ 833,285
31 August 2024	+ 794,158
30 September 2024	+ 718,140
31 October 2024	+ 1,437,366

- 2.13** Interest is charged/paid on the monthly indebtedness between the Council and the Partnership. Interest will be calculated in March 2025.
- 2.14** The positive cash balance at 31<sup>st</sup> October 2024 is attributable to funding received from Scottish Government grants, including the grant for 'People and Place Programme 2024/25'.

**Reserves**

- 2.15** The Board's Reserves Policy recommends establishment of an unallocated General Fund Reserve based on a minimum value of 5% (£45,000) of the Partnership's core revenue budget. At 1<sup>st</sup> April 2024, the Partnership has an unallocated General Fund Reserve of £135,000.

- 2.16 Based on the forecast requirement for drawdown of £14,000 at 31<sup>st</sup> March 2025, the Partnership’s unallocated General Fund Reserve will be reduced to £121,000.
- 2.17 The Reserves Policy recommends that where slippage occurs on approved revenue projects, the balance of slippage is retained as an earmarked balance. In total, £293,000 of project cost has been carried forward from 2023/24 and is included in the Projects budget shown in Appendix 2.
- 2.18 An update of Financial Risks for 2024/25 is included at Appendix 3.

**3 Recommendations**

It is recommended that the Partnership notes:

- 3.1 notes the forecast overspend on the Core revenue budget of £14,000, which is principally due to a reduction in Scottish Government grant funding and will be met by a drawdown from the Partnership’s unallocated reserve;
- 3.2 notes the forecast underspend on the Projects budget of £50,000, after future lease commitments are met;
- 3.3 the re-alignment of the 2024/25 Projects budget to reflect planned activity.

**Richard Lloyd-Bithell**

Treasurer

29th November 2024

**Appendix**            Appendix 1 – Core Budget Statement at 31st October 2024  
 Appendix 2 – Projects Budget as at 31<sup>st</sup> October 2024

**Contact**            [iain.shaw@edinburgh.gov.uk](mailto:iain.shaw@edinburgh.gov.uk)

Policy Implications	There are no policy implications arising as a result of this report.
Financial Implications	There are no financial implications arising as a result of this report.
Equalities Implications	There are no equality implications arising as a result of this report.
Climate Change Implications	There are no climate change implications arising as a result of this report.

Core Budget 2024/25 – as at 31st October 2024

Appendix 1

	Annual Budget £'000	Period Budget £'000	Period Actual £'000	Annual Forecast £'000	Forecast Variance £'000
<b>Employee Costs</b>					
Salaries	499	291	279	494	(5)
National Insurance	57	34	31	55	(2)
Pension Fund	134	78	81	138	4
Recharges (to Projects)	0	0	0	(20)	(20)
Training & Conferences	10	6	2	8	(2)
Interviews & Advertising	2	1	0	0	(2)
	<b>702</b>	<b>410</b>	<b>393</b>	<b>675</b>	<b>(27)</b>
<b>Premises Costs</b>					
Office Accommodation	18	9	10	21	3
<b>Transport</b>					
Staff Travel	8	5	1	5	(3)
<b>Supplies and Services</b>					
Communications & Computing	48	29	26	48	0
Hosted Service - Novus FX	44	44	49	45	1
Printing, Stationery & General Office Supplies	7	4	5	7	0
Insurance	7	0	0	7	0
Equipment, Furniture & Materials, Miscellaneous	4	2	2	5	1
	<b>110</b>	<b>79</b>	<b>82</b>	<b>112</b>	<b>2</b>
<b>Support Services</b>					
Finance	31	0	0	31	0
Legal Services / HR	7	0	0	7	0
External Consultants	0	0	1	1	1
	<b>38</b>	<b>0</b>	<b>1</b>	<b>39</b>	<b>1</b>
<b>Corporate &amp; Democratic</b>					
Clerks Fees	12	0	0	12	0
External Audit Fees	12	0	0	12	0
Members Allowances and Expenses	1	0	0	0	(1)
	<b>25</b>	<b>0</b>	<b>0</b>	<b>24</b>	<b>(1)</b>
<b>Total Expenditure</b>	<b>901</b>	<b>503</b>	<b>487</b>	<b>876</b>	<b>(25)</b>
<b>Funding:</b>					
Scottish Government Grant	(711)	(494)	(494)	(672)	39
Council Requisitions	(190)	(190)	(110)	(190)	0
<b>Total Funding</b>	<b>(901)</b>	<b>(684)</b>	<b>(604)</b>	<b>(862)</b>	<b>39</b>
<b>Net Expenditure/ (Income)</b>	<b>0</b>	<b>(181)</b>	<b>(117)</b>	<b>14</b>	<b>14</b>

Projects Budget 2024/25 - as at 31st October 2024

Appendix 2

	Approved Budget	2023/24 Under-spend	Future Lease costs	EU /Other Grant	Budget Realign ment	Net Expenditure Budget	Annual Forecast	Forecast Variance
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
EU Projects (various)	0	(9)			9	0	0	0
Sustainable Travel	6	79			(60)	25	25	0
RTPI – System Maintenance	25	17		(15)	(27)	0	0	0
RTPI – Regional Framework	0			0	0	0	0	0
RTS Delivery Plan	18	(14)			16	20	20	0
Equalities Access to Healthcare	10	10			(15)	5	5	0
GO e-Bike	10	39				49	49	0
Thistle Assistance	30	2		(24)	(2)	6	6	0
Transport Appraisal	0	(14)			22	8	8	0
Active Travel Network	0	51	106		(48)	109	109	0
Projects Consultancy	11	2			9	22	22	0
Mobility as a Service	0	(36)			36	0	0	0
Bus Strategy Development	115	40		(115)	35	75	25	(50)
Regional EV Infrastructure		20			15	35	35	0
Freight Strategy					10	10	10	0
People & Places	5,326			(5,326)		0	0	0
Harpcat Horizon	100			(100)		0	0	0
<b>Total</b>	<b>5,651</b>	<b>187</b>	<b>106</b>	<b>(5,580)</b>	<b>0</b>	<b>364</b>	<b>314</b>	<b>(50)</b>

Risk Description	Mitigation and Controls
<p><b>Pay award</b> The revenue budget made provision for a pay award of up to 3% in 2024/25. The Local Government pay award represents an increase on the budget provision.</p>	<p>The financial impact of the Local Government pay award is included in the forecast.</p>
<p><b>Inflation</b> There is a risk that the indicative budget does not adequately cover price inflation and increasing demand for services.</p>	<p>Ongoing monitoring and review of all costs and forecasts during 2024/25.</p>
<p><b>Delays in payment of grant by external funding bodies</b> Resulting in additional short-term borrowing costs.</p>	<p>Grant claims submitted timeously and in line with conditions of grant award.</p>
<p><b>Pension Fund Contributions</b> A deficit on the staff pension fund could lead to increases in the employer's pension contribution.</p>	<p>Following Lothian Pension Fund's Triennial Actuarial Review in 2023, Partnership employer pension fund contribution rates are now confirmed at 26.8% until 31 March 2027.</p>
<p><b>Funding Reductions</b> Reduction in funding from Scottish Government and/or council requisitions.</p> <p>There is a risk that current levels of staffing cannot be maintained due to funding constraints and that the Partnership will incur staff release costs.</p>	<p>Scottish Government grant and Council contributions are confirmed for 2024/25.</p> <p>Recruitment control and additional sources of external funding for activities aligned to the Partnership's objectives to supplement resources.</p>

## **2023/24 Annual Audit Report and Audited Annual Accounts 2023/24**

### **1. Introduction**

1.1 This report presents the:

1.1.1 The 2023/24 Annual Audit Report by Audit Scotland and

1.1.2 the Audited Annual Accounts for the year ended 31st March 2024.

### **2. Main Report**

2.1 The unaudited Annual Accounts were noted by the Partnership at its meeting on 21<sup>st</sup> June 2024.

2.2 The Partnership's appointed External Auditor, Audit Scotland, has completed the annual audit. The Annual Audit Report is presented at Appendix 1.

2.3 The Audited Annual Accounts for the year ended 31<sup>st</sup> March 2024 are presented at Appendix 2.

2.4 The Annual Audit Report states the accompanying financial statements:

- give a true and fair view of the state of affairs of the Partnership as at 31 March 2024 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with UK adopted international accounting standards, as interpreted and adapted by the 2022/23 Code; and;
- have been prepared in accordance with the requirements of the Local Government (Scotland) Act 1973, The Local Authority Accounts (Scotland) Regulations 2014, and the Local Government in Scotland Act 2003

2.5 The Audit Opinion is included in the Independent Auditor's report at pages 50 to 52 of the Audited Annual Accounts.

2.6 The Performance and Audit Committee reviewed the External Auditor's report and the Audited Accounts at its' meeting on 29th November 2024.

### **3 Recommendations**

It is recommended that the Partnership Board:

3.1 note the Annual Audit Report to members of South East of Scotland Transport Partnership and the Controller of Audit;

**3.2** authorise the Audited Annual Accounts for signature.

**Richard Lloyd-Bithell**

Treasurer

29<sup>th</sup> November 2024

- Appendix**
- 1 - Annual Audit Report to members of South East of Scotland Transport Partnership and the Controller of Audit
  - 2 - Audited Annual Accounts 2023/24

**Contact** iain.shaw@edinburgh.gov.uk

Policy Implications	There are no policy implications arising as a result of this report.
Financial Implications	There are no financial implications arising following issue of an unqualified Audit certificate.
Equalities Implications	There are no equality implications arising as a result of this report.
Climate Change Implications	There are no climate change implications arising as a result of this report.

# South East of Scotland Transport Partnership

Proposed 2023/24 Annual Audit Report



 AUDIT SCOTLAND

Prepared for the South East of Scotland Transport Partnership and the Controller of Audit  
November 2024



# Contents

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Key messages	3
Introduction	4
Part 1. Audit of 2023/24 annual accounts	6
Part 2. Wider Scope	13
Appendix 1. Action plan 2023/24	17

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# Key messages

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## 2023/24 annual accounts

- 1 The financial statements give a true and fair view and were properly prepared in accordance with the financial reporting framework.
- 2 The audited part of the remuneration report, management commentary and annual governance statement were properly prepared in accordance with applicable requirements.
- 3 We have reported significant findings from the audit relating to the recognition of income and expenditure and record keeping for the management of assets.

## Wider scope

- 4 The partnership has a medium-term financial plan, however there is scope to improve the partnership's financial reporting.
- 5 The partnership's responsibilities are evolving with a new grant awarding role in 2024/25 through Transport Scotland's Active Travel programme. This will distribute approximately £5.3 million to partners and represents a significant change in responsibilities and governance for the partnership.
- 6 The partnership has arrangements in place to secure Best Value

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# Introduction

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**1.** This report summarises the findings from the 2023/24 annual audit of the South East of Scotland Transport Partnership (the partnership). The scope of the audit was set out in an Annual Audit Plan presented to the 1 March 2024 meeting of the Performance and Audit Committee. This Annual Audit Report comprises:

- significant matters arising from an audit of the partnership's annual accounts
- conclusions on wider scope areas that frame public audit as set out in the [Code of Audit Practice 2021](#), which for less complex bodies includes conclusions on financial sustainability and Best Value.

**2.** This report is addressed to the partnership and the Controller of Audit and will be published on Audit Scotland's website [www.audit-scotland.gov.uk](http://www.audit-scotland.gov.uk) in due course.

## Responsibilities and reporting

**3.** The partnership has primary responsibility for ensuring the proper financial stewardship of public funds. This includes preparing annual accounts that are in accordance with proper accounting practices. The partnership is also responsible for compliance with legislation putting arrangements in place for governance and propriety.

**4.** Our responsibilities as the independent auditor appointed by the Accounts Commission are established by the Local Government in Scotland Act 1973, the Code of Audit Practice and supplementary guidance and International Standards on Auditing in the UK.

**5.** The weaknesses or risks identified in this report are only those which have come to our attention during the team's normal audit work and may not be all that exist. Communicating these does not absolve management from its responsibility to address the issues raised and to maintain adequate systems of control.

**6.** This report contains an agreed action plan at [Appendix 1](#) setting out specific recommendations, responsible officers, and dates for implementation.

## Auditor Independence

**7.** We can confirm that the audit team complies with the Financial Reporting Council's Ethical Standard. We can also confirm that the audit team have not undertaken any non-audit related services. We experienced delays to receiving audit evidence and undertook additional testing in response to errors in the unaudited accounts. As a result, we have increased our audit fee by £2,410. Our

final audit fee is £14,970. We are not aware of any relationships that could compromise our objectivity and independence. We are not aware of any relationships that could compromise our objectivity and independence.

**8.** The annual audit adds value to the partnership by:

- identifying and providing insight on significant risks, and making clear and relevant recommendations
- sharing intelligence and good practice identified.

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# Part 1. Audit of 2023/24 annual accounts

Public bodies are required to prepare annual report and accounts comprising financial statements and other related reports. These are principal means of accounting for the stewardship public funds.

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## Main judgements

The financial statements give a true and fair view and were properly prepared in accordance with the financial reporting framework.

Adjustments have been made to the annual accounts as a result of the audit process, including revisions to income, expenditure and non-current assets

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## Audit opinions on the annual accounts are unmodified

9. The Board approved the annual accounts for the partnership for the year ended 31 March 2024 on **6 December 2024**. As reported in the independent auditor's report, in our opinion as the appointed auditor:

- the financial statements give a true and fair view and were properly prepared in accordance with the financial reporting framework
- the audited part of the remuneration report, management commentary and annual governance statement were consistent with the financial statements and properly prepared in accordance with the applicable requirements.

## Overall materiality was assessed on receipt of the annual accounts as £50,000

10. Broadly, the concept of materiality is applied by auditors to determine whether misstatements identified during the audit could reasonably be expected to influence the economic decisions of users of the accounts, and hence impact their opinion set out in the independent auditor's report. Auditors set a monetary threshold when considering materiality, although some issues may be considered material by their nature. It is ultimately a matter of the auditor's professional judgement.

**11.** Our initial assessment of materiality was carried out during the risk assessment phase of the audit. This was reviewed and revised on receipt of the unaudited annual accounts and is summarised in [Exhibit 1](#).

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## Exhibit 1 Materiality values

Materiality level	Amount
Overall materiality	£50,000
Performance materiality	£33,000
Reporting threshold	£3,000

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**12.** The overall materiality threshold was set with reference to gross expenditure, which was judged as the figure most relevant to the users of the financial statements.

**13.** Performance materiality is used by auditors when undertaking work on individual areas of the financial statements. It is a lower materiality threshold, set to reduce the probability of aggregated misstatements exceeding overall materiality. Performance materiality was set at 65% of overall materiality, reflecting no significant prior period errors and few complex accounting areas within the annual accounts.

**14.** It is our responsibility to request that all misstatements, other than those below the reporting threshold, are corrected. The final decision on making the correction lies with those charged with governance.

## Significant findings and key audit matters

**15.** Under ISA (UK) 260, we communicate significant findings from the audit to the Partnership Board including our view about the qualitative aspects of SEStran's accounting practices.

**16.** The Code of Audit Practice also requires me to highlight key audit matters, which are defined in ISA (UK) 701 as those matters judged to be of most significance.

**17.** The significant findings, including key audit matters, are summarised in [Exhibit 2](#).

## Exhibit 2

### Significant findings and key audit matters from the audit of the annual accounts

Issue	Resolution
<p><b>1. Management and recording of non-current assets</b></p> <p>SEStran holds a large number of relatively low-value individual assets which include bikes, screens and technology related to real-time transport information. Our review of the asset register and corresponding entries in the accounts found a number of material findings:</p> <ul style="list-style-type: none"> <li>• The asset register and balance sheet presented for audit included £198,000 of assets which were impaired in previous years and should have been removed from the disclosures in the accounts.</li> <li>• Not all assets disclosed on the register are allocated a unique reference or serial number, meaning there is often no direct link between the asset register and the physical item.</li> <li>• The asset register has been cumulatively modified over several years, and no longer provided a clear audit trail to the disclosures in the accounts. This included duplication of information and complex formulas.</li> </ul>	<p>The non-current asset register was extensively revised to provide a clearer link to the disclosures in the accounts. This resulted in a prior year correction to remove £198,000 of impaired assets from 2015/16 which had been included in error.</p> <p>SEStran should undertake a full review of its asset management procedures, ensuring that the asset register fully reflects the assets in use. The partnership should:</p> <ul style="list-style-type: none"> <li>• Review and update the accounting policy for non-current assets in line with Code requirements, including information on useful lives, the approach to impairment and the basis of capitalisation.</li> <li>• Improve the asset register to provide a direct link to the disclosures in the accounts, including sufficient detail to ensure that physical items are individually identifiable</li> <li>• Ensure that that physical items are appropriately tagged to create a direct link between the register and the asset.</li> <li>• Ensure that impairment reviews are carried out on a regular basis, including physical inspection of assets. This should be documented in a systematic and methodical way which allows the asset register to be reflective of asset condition. It is important that the partnership works closely with their finance colleagues at City of Edinburgh Council to ensure that disclosures in the accounts are reflective of the assets in operation.</li> </ul> <p><b>Recommendation 1</b></p> <p>(refer <a href="#">Appendix 1</a>, action plan)</p>
<p><b>2. Income and expenditure errors of £626,000 relating to agency transactions</b></p> <p>SEStran has arrangements to procure goods and services on behalf of constituent local authorities and other customers, where SEStran is acting as an intermediary.</p>	<p>Management confirmed these transactions were agency in nature and has corrected the misstatements in the revised annual report and accounts. We reviewed the contracts and framework agreements, supporting purchase</p>

Issue	Resolution
<p>We identified that c. £626,000 of agency transactions were included in the partnership's income and expenditure statement. SEStran was not acting as principal in these transactions and it did not direct where the money was spent, therefore this income and expenditure is agency in nature.</p> <p>The Code of Practice requires that agency income and expenditure should not be recognised in the partnership's income and expenditure statement, except for amounts owed at year-end.</p>	<p>invoices and sales invoices to confirm this assessment.</p> <p>As the transactions were removed from both income and expenditure, there is no net effect on the total surplus/deficit.</p>
<p><b>3. Reduction in disclosed pension asset</b></p> <p>The pension liability/asset is an area of audit focus due to the material value and significant assumptions used within this complex calculation. In common with other local government pension scheme employers, Lothian Pension Fund commissions a firm of actuaries to value its pension liability and the accounting entries in the financial statements. The actuary reported that, as at 31 March 2024, the partnership had a funding surplus of £0.610 million.</p> <p>The surplus arose as a result of a significant increase to the net discount rate (discount rate net of CPI inflation) compared to the previous year, leading to a large gain on the balance sheet .</p> <p>Accounting standards impose a limit on the maximum amount of surplus which can be recognised on an employer's balance sheet. Given that the partnership is to continue to participate in the LGPS (Local Government Pension Scheme), it would be expected that this surplus could lead to lower future contributions rather than a refund of surplus. When this minimum funding obligation is considered, the asset was reduced to zero.</p>	<p>The annual report and accounts presented for audit disclosed a pension asset of £0.610 million. This was reduced to zero, with a corresponding adjustment to the pension reserve, for the final version of the accounts in line with the requirements of accounting standards.</p>
<p><b>4. Expenditure allocated to the wrong financial year</b></p> <p>Our testing of expenditure identified three transactions totalling c.£30,000 which were recorded in the incorrect financial year.</p>	<p>Management corrected these misstatements in the final revised accounts.</p> <p>In addition to the prepayment identified in point 7 below, these cut-off errors became collectively significant to our audit. The</p>



Issue	Resolution
<p data-bbox="113 257 794 369"></p> <p data-bbox="113 398 794 474"><b>5. Errors in the cash flow statement and workings</b></p> <p data-bbox="113 488 794 712">The cash flow statement provides an understanding of SEStran's actual cashflows during the period, which will be different to the income and expenditure statement due to accounting requirements and the timing of transactions.</p> <p data-bbox="113 725 794 891">The workings for the cash flow statement provided to audit did not provide a clear audit trail and the supporting evidence was not sufficiently linked to ledger transactions.</p>	<p data-bbox="794 257 1493 369">partnership should strengthen procedures around the year end to ensure that income and expenditure is correctly accrued.</p> <p data-bbox="794 398 1493 654">The cash flow statement was extensively reworked. Revised working papers were provided which provided clearer supporting evidence for the statement. This resulted in amendments and recognition of two capital additions totalling £9,000. This error has been corrected in the final version of the accounts.</p>
<p data-bbox="113 891 794 945"><b>6. Identification of leases</b></p> <p data-bbox="113 958 794 1258">SEStran entered into a five-year arrangement with a bike hire company in 2023/24, with the invoiced amount of £113,000 paid in full during the year. As SEStran has not yet benefited from remaining four years of this arrangement, £106,000 of the invoice should be recognised as a prepayment and the assets should be disclosed as in the operating leases note.</p>	<p data-bbox="794 891 1493 1236">Management has corrected these misstatements in the revised annual report and accounts. The partnership will adopt IFRS 16 in 2024/25 which brings right-of-use assets on to the balance sheet. It is therefore important that all lease arrangements are identified which may require to be accounted for under this newly-adopted standard next year.</p>
<p data-bbox="113 1332 794 1386"><b>7. Improvements to audit process</b></p> <p data-bbox="113 1400 794 1550">We experienced a delay to the completion of our audit due to late receipt of documentation. We identified that finance staff are under pressure due to competing priorities.</p>	<p data-bbox="794 1332 1493 1751">We recommend that management ensures there is sufficient capacity in finance to support timely responses to audit requests. The partnership and the finance team responsible for compiling the annual accounts, based at City of Edinburgh Council, should work closely together to ensure that the substance of transactions, particularly those involving capital expenditure and assets, is accurately reflected in the accounts.</p> <p data-bbox="794 1765 1493 1865"><b>Recommendation 2</b> (refer <a href="#">Appendix 1</a>, action plan).</p>

## Audit work responded to the risks of material misstatement identified in the annual accounts

**18.** We have obtained audit assurances over the identified significant risks of material misstatement to the annual accounts. [Exhibit 3](#) sets out the significant risks of material misstatement to the financial statements identified in the 2023/24 Annual Audit Plan. It also summarises the further audit procedures performed during the year to obtain assurances over these risks and the conclusions from the work completed.

### Exhibit 3

#### Identified significant risks of material misstatement in the annual accounts

Audit risk	Assurance procedure	Results and conclusions
<p><b>1. Risk of material misstatement due to fraud caused by management override of controls</b></p> <p>As stated in ISA (UK) 240, management is in a unique position to perpetrate fraud because of management's ability to override controls that otherwise appear to be operating effectively.</p>	<ul style="list-style-type: none"> <li>• Tested journals with a focus on significant risk areas.</li> <li>• We considered any unusual or material transactions identified through our audit testing for any evidence of management override of controls.</li> <li>• Substantive testing of income and expenditure transactions around the year-end to confirm they were accounted for in the correct financial year.</li> <li>• Focussed testing of accounting accruals and prepayments</li> </ul>	<ul style="list-style-type: none"> <li>• No issues were identified that indicate misstatements due to fraud caused by management override of controls.</li> <li>• Audit testing of found errors in the recording of transactions in the correct accounting year. These errors have been resolved and amended in the revised version of the annual accounts. <a href="#">Refer Exhibit 2</a></li> </ul>
<p><b>2. Risk of material misstatement caused by fraud in expenditure</b></p> <p>The Code of Audit Practice expands the consideration of fraud under ISA (UK) 240 to include the risk of fraud over expenditure. There is a risk that expenditure may be materially misstated in the 2023/24 financial statements due to the extent and nature</p>	<ul style="list-style-type: none"> <li>• Detailed testing of expenditure transactions focussing on the areas of greatest risk</li> <li>• Review of budget monitoring reports, focusing on significant variances</li> <li>• Review of arrangements in place to prevent and detect fraud</li> </ul>	<ul style="list-style-type: none"> <li>• Audit testing identified errors in the disclosure of expenditure transactions. These errors have been resolved and amended in the revised version of the annual accounts. <a href="#">Refer Exhibit 2</a></li> <li>• We reviewed budget monitoring reports that are presented at each committee meeting. We concluded that financial management reporting is accurate and appropriate.</li> </ul>

Audit risk	Assurance procedure	Results and conclusions
<p>of the following significant expenditure streams:</p> <ul style="list-style-type: none"> <li>• Project related expenditure (2022/23: £1.472m)</li> <li>• Other service expenditure (2022/23 £0.211m)</li> </ul>		<ul style="list-style-type: none"> <li>• We did not identify any instances of fraud</li> </ul>

**19.** As a result of the audit, gross errors of £1.4 million were corrected. The net impact was a reduction in income of £472,000 and a reduction in net assets of £472,000.

### **The unaudited annual accounts were received in line with the agreed timetable**

**20.** The unaudited annual accounts were received in line with the agreed audit timetable on 27 June 2024.

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# Part 2. Wider Scope

For less complex bodies, wider-scope audit work considers the financial sustainability of the body and the services that it delivers over the medium to longer-term, and the arrangements for securing Best Value.

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## Conclusion

The partnership has a medium-term financial plan, however there is scope to improve the partnership's financial reporting.

The partnership's responsibilities are evolving with a new grant awarding role in 2024/25 through Transport Scotland's Active Travel programme. This will distribute approximately £5.3 million to partners and represents a significant change in responsibilities and governance for the partnership.

The partnership has arrangements in place to secure Best Value.

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### **The partnership reports a net overall underspend of £0.379 million against its budget for 2023/24**

**21.** The partnership receives most of its funding from the Scottish Government via Transport Scotland, and requisitions from constituent council members. The partnership also receives a significant proportion of income through securing externally-generated funding. The partnership approved its initial 2023/24 budget in March 2023. Revenue grant funding of £0.782 million from Transport Scotland and requisitions of £0.190 million from constituent councils remained at the same level as previous years. The partnership budgeted for external income of £0.515 million (£0.554 million in 2022/23) to fund approximately 35% of its budgeted expenditure.

**22.** The partnership reports an underspend of £0.086 million on its core revenue budget (expenditure of £0.734 million against a budget of £0.815 million). This has been attributed to staff vacancies which arose throughout the year. The partnership reports a net underspend in its projects budget of £0.293 million after inclusion of an earmarked reserve brought forward (actual net expenditure of £0.23 million against budgeted net expenditure of £0.316 million). Of the projects underspend, £0.106 million is committed to expenditure in 2024/25, and it forecasts that slippage on project-related expenditure will be spent in 2024/25.

## SEStran has a medium-term financial plan, but internal audit has identified scope to improve the partnership's financial reporting

**23.** As we noted in our 2022/23 Annual Audit Report, the partnership has a medium-term financial plan to the year 2025/26. An indicative financial plan is updated annually and was last presented to the partnership's board on 15 March 2024. The plan anticipated that expenditure will be fully funded in 2024/25, but forecasts a small shortfall of £18,000 in 2025/26. The budget for 2024/25 was agreed in March 2024, setting out total revenue expenditure of £1.226 million (2023/24: 1.738 million).

**24.** Following approval of the budget, SEStran subsequently received a formal grant offer from Transport Scotland of £5.326 million for SEStran's People and Place programme, significantly increasing the planned spend for 2024/25. The funding is intended to enable the delivery of behavioural change projects which would increase rates of active travel (walking, wheeling and cycling). This consists of an additional £1.9 million of revenue, and £3.412 million capital expenditure.

**25.** The partnership recognises there is a risk around future financial sustainability. Assumptions in medium term financial planning include pay awards, inflation and reductions in grant funding. The partnership mitigates these risks through recruitment control and seeking external funding opportunities that align with their purpose. The partnership also maintains a reserves policy of at least 5% of its core revenue budget.

**26.** In 2023/24, internal audit reviewed the design and effectiveness of the controls in place at the partnership to secure financial sustainability. Overall, they concluded reasonable assurance could be taken from the controls in place with recommendations made including:

- Financial planning procedures should include scenario planning
- Finance officer reports on the financial position which are presented to the Board, should also be presented to the Performance and Audit committee
- A log of all potential funding opportunities and actions taken to secure them should be maintained

## The people and place plan represents a significant change in role for the partnership

**27.** In 2024/25, the partnership was awarded approximately £5.3 million from Transport Scotland's Active Travel Transformation Programme, with regional transport partnerships now responsible for the disbursement of government grants to change active travel behaviour in their regions.

**28.** SEStran will distribute up to £5.3 million of funding to projects across the region that deliver against key areas of the partnership's People and Place programme. In March 2024, the partnership developed contract standing orders

to ensure good governance arrangements surrounding grant awards, and to provide clear roles and responsibilities. The standing orders include eligibility and assessment criteria, delegated authorisation limits, and considers due diligence for potential project partners. Management has indicated it plans to develop measurable KPIs for these projects to support reporting on outcomes to Transport Scotland.

**29.** The new standing orders and assessment process includes provisions to ensure that intended outcomes are achieved and managed, but they do not specify in detail how the partnership will monitor if the grant has been spent in line with terms and conditions, and if desired outcomes have been achieved.

**30.** It will be important that SEStran implements a robust post-award performance management process to ensure outcomes are fully aligned with the terms and conditions of the grant agreement. These should identify key performance measures, ensure any risks or delays are reported as soon as they are identified, and outline actions to be taken in the event of a breach. We will assess progress in this area during our 2024/25 audit.

## **SEStran has appropriate arrangements in place for securing Best Value**

**31.** [Ministerial guidance to Accountable Officers](#) for public bodies and the [Scottish Public Finance Manual](#) (SPFM) sets out the accountable officer's duty to ensure that arrangements are in place to secure best value. The guidance sets out the key characteristics of best value and states that compliance with the duty of best value requires public bodies to take a systematic approach to self-evaluation and continuous improvement.

**32.** Procurement decisions are important to securing best value, and the partnership's contract standing orders set out processes for procurement of goods and services. In 2022/23, the service provider for the partnership's Go e-bike project went into liquidation. As part of a lessons-learned exercise, SEStran engaged with a solicitor to develop its contract standing orders to ensure that they met business needs and provide increased scrutiny and openness. These were subsequently approved in June 2024.

**33.** Delivery of best value responsibilities is included as part of the partnership's 2021-24 business plan strategic 'governance' objective. The 2021-24 business plan links SEStran's objectives to current projects and the Scottish Government's National Transport Strategy priorities. Project and strategy updates are reported at partnership board meetings, and a synopsis of performance is also reported in the annual report. We can conclude that arrangements to secure best value are appropriate.

**34.** The previous three-year business plan format is being adjusted to a one-year plan in 2024/25 to accommodate the new People and Place planning and funding mechanisms. SEStran should ensure business plans remain aligned to overall strategies and national priorities, and consider how it assesses compliance against the Scottish Government's Best Value themes.

## Audit work has addressed the wider scope risks identified in the Annual Audit Plan

35. [Exhibit 4](#) sets out the wider scope risks relating to Financial Sustainability identified in the 2023/24 Annual Audit Plan. It summarises the audit procedures performed during the year to obtain assurances over these risks and the conclusions from the work completed.

### Exhibit 4

#### Risks identified from our wider responsibility under the Code of Audit Practice

Audit risk	Assurance procedure	Results and conclusions
<p><b>1. Financial sustainability</b></p> <p>SEStran has submitted a proposal to Transport Scotland for additional Scottish Government funding of c.£5.3 million to administer Active Travel awards from 2024/25 onwards, representing a significant increase in the partnership's overall expenditure. Without adequate planning for this expansion in activity, there is a risk that resources are strained and the partnership is unable to secure best value.</p>	<ul style="list-style-type: none"> <li>• Considered SEStran's strategy to accommodate organisational and financial changes due to increased government funding</li> <li>• Ongoing review of financial budget monitoring and reporting arrangements in place to achieve a balanced budget</li> <li>• Reviewed and assessed revised governance arrangements to accommodate increased government funding and change of role</li> </ul>	<p>The arrangements to secure financial sustainability are considered appropriate with further recommendations made by internal audit to strengthen the controls in this area.</p>



# Appendix 1. Action plan 2023/24

## 2023/24 recommendations

Issue/risk	Recommendation	Agreed management action/timing
<p><b>1. Accounting for non-current assets</b></p> <p>Our review of the asset register and corresponding entries in the 2023/24 unaudited accounts found a number of material errors. There is a risk that accounting records for non-current assets are not accurate or adequately maintained.</p>	<p>SEStran should undertake a full review of its asset management procedures, ensuring that the asset register fully reflects the assets in use. The partnership should:</p> <ul style="list-style-type: none"> <li>• Review and update the accounting policy for non-current assets in line with Code requirements.</li> <li>• Improve the asset register to provide a direct link to the disclosures in the accounts</li> <li>• Ensure that that physical items are appropriately tagged to create a direct link between the register and the asset.</li> <li>• Ensure that impairment reviews are carried out on a regular basis, including physical inspection of assets.</li> <li>• Review the useful life of all assets annually to assess if a change in estimate is required.</li> </ul> <p><a href="#">Exhibit 2</a></p>	<p>SEStran will devise an Asset Management Strategy and submit it for approval at the Partnership's Board in March 2025.</p> <p>The strategy, which will address all of the points raised by the auditors, will be fully implemented immediately following approval. However, many of the actions emerging as part of the strategy will be implemented prior to the financial year end.</p> <p><b>Responsible officer:</b> Partnership Director</p> <p><b>Target date:</b> Strategy approved by end March 2025 and fully implemented by June 2025</p>
<p><b>2. Improvements to the audit process</b></p>	<p>We recommend that management ensures there is sufficient capacity in finance</p>	<p>Confirmation on 12 April 2024 of a delay in commencement of the external audit was a</p>



Issue/risk	Recommendation	Agreed management action/timing
<p>We experienced a delay to the completion of our audit due to late receipt of documentation. We identified that finance staff are under pressure due to competing priorities.</p>	<p>to support timely responses to audit requests. The partnership and the finance team responsible for compiling the annual accounts, based at City of Edinburgh Council, should work closely together to ensure that the substance of transactions, particularly those involving capital expenditure and assets, is accurately reflected in the accounts.</p> <p><a href="#">Exhibit 2</a></p>	<p>contributory factor to the capacity issues experienced during the course of the external audit, with work plans and resource availability already fixed by this date.</p> <p>In light of the issues experienced on the 2023/24 external audit, a review of resource availability will be undertaken in advance of the 2024/25 external audit.</p> <p><b>Responsible officer:</b> Partnership Director/ Treasurer <b>Target date:</b> 31 March 2025</p>

## Follow-up of prior year recommendations

Issue/risk	Recommendation and agreed action	Update
<p><b>4. Presentation of key performance information. 2022/23 AAR</b></p> <p>There is scope to improve the management commentary to provide a clearer narrative on performance during the year and be supported by financial and non-financial information.</p>	<p>It is important that a clear and understandable picture of performance is presented, such as how the overall deficit or surplus was reached, or performance against budget. An overview of service performance in the year and the inclusion of relevant key performance indicators should enhance the service 'story'.</p> <p>Agreed action:</p> <p>A review of information included in the management commentary will be undertaken for the</p>	<p><b>Implemented</b></p> <p>The management commentary for 2023/24 includes a summary of external funding secured during 2023/24, a key factor in the partnership's financial sustainability; and reference to Treasury management and performance of this.</p> <p>The management commentary includes details of the work to introduce a project lifecycle management process which includes development of milestones, a</p>

Issue/risk	Recommendation and agreed action	Update
	preparation of the 2023.24 Annual Accounts. 31 March 2024	report to the board on the project close.

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# South East of Scotland Transport Partnership

## Proposed 2023/24 Annual Audit Report

Audit Scotland's published material is available for download on the website in a number of formats. For information on our accessibility principles, please visit:

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**The South East of Scotland  
Transport Partnership  
(SESTRAN)**

**Audited  
Annual Accounts**

**2023/2024**

# The South East of Scotland Transport Partnership (SESTRAN)

## CONTENTS

	<u>Page</u>
Management Commentary	2 - 9
Statement of Responsibilities for the Annual Accounts	10
Annual Governance Statement	11 - 13
Remuneration Report	14 - 15
 <u>Accounting Statements and Notes to the Annual Accounts:</u>	
Annual Accounts	
1. <i>Movement in Reserves Statement for the year ended 31st March 2024</i>	16
2. <i>Comprehensive Income &amp; Expenditure Statement for the year ended 31st March 2024</i>	17
3. <i>Balance Sheet as at 31st March 2024</i>	18
4. <i>Cash Flow Statement for the year ended 31st March 2024</i>	19
Statement of Accounting Policies	20 - 23
Notes to the Annual Accounts	24 - 49
Independent Auditors Report	50 - 52

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary

### 1. Basis of Accounts

The Partnership prepares its Annual Accounts in accordance with the Code of Practice on Local Authority Accounting in the United Kingdom. The Code of Practice is based on International Financial Reporting Standards (IFRS).

### 2. Statutory Background

The South East of Scotland Transport Partnership (SESTRAN) was established under the Regional Transport Partnerships (Establishment, Constitution and Membership) (Scotland) Order 2005. The Partnership came into force on 1st December 2005. Under Section 3 of the Transport (Scotland) Act 2005, the net expenses of SESTRAN, after allowing for government grant and any other income, are met by its constituent councils.

In accordance with Section 122 of the Transport (Scotland) Act 2019, which allows Regional Transport Partnerships to carry forward reserves, the Partnership established a General Fund reserve. This provision in the Transport (Scotland) Act 2019 came into effect on 19 March 2020.

### 3. Corporate Strategy

The following is an extract from the Transport (Scotland) Act 2005, which established the Partnership; one of seven Scottish Regional Transport Partnerships (RTPs). It lays out the statutory remit of RTPs and puts the Corporate Strategy in context.

- (1) It is the duty of each Transport Partnership to draw up a strategy for transport within its region (its “transport strategy” or RTS).
- (2) Its transport strategy shall include provision about each of the following matters—
  - (a) the respects in which transport in the region needs to be provided, developed or improved having regard to, among other things—
    - (i) future needs including those occasioned by demographic and land use changes; and
    - (ii) what can be done, taking account of cost, funding and practicability;
  - (b) meeting the needs of all inhabited places, in particular, those which the Partnership considers different from the remainder of the region by reason of their remoteness or the sparsity of their populations;
  - (c) meeting the need for efficient transport links between heavily populated places;
  - (d) how transport in the region will be provided, developed, improved and operated so as—
    - (i) to enhance social and economic well-being;
    - (ii) to promote public safety, including road safety and the safety of users of public transport;
    - (iii) to be consistent with the principle of sustainable development and to conserve and enhance the environment;
    - (iv) to promote social inclusion;
    - (v) to encourage equal opportunities and, in particular, the observance of the equal opportunities requirements;
    - (vi) to facilitate access to hospitals, clinics, surgeries and other places where a health service is provided;
    - (vii) to integrate with transport elsewhere;
  - (e) the order of priority in which different elements of the provision, development and improvement of transport should be undertaken;
  - (f) how the Transport Partnership's functions will be exercised so as to fulfil its transport strategy and, if the Partnership considers that the conferring of further functions is necessary for that purpose, what those functions are;
  - (g) how the Transport Partnership, so as to enable it to fulfil its transport strategy, will seek to influence its constituent councils or council in the performance of their functions relating to transport;
  - (h) the measuring and monitoring of the achievement of the strategy.

The new RTS - SEStran 2035 - was approved by Ministers in March 2023 and replaces the Regional Transport Strategy 2015 - 2025 Refresh published in July 2015. It addresses the transport problems and issues being experienced in the SEStran region.

The constituent councils of the Partnership are the City of Edinburgh, Clackmannanshire, East Lothian, Falkirk, Fife, Midlothian, Scottish Borders and West Lothian.

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 3. Corporate Strategy (*continued*)

Together, these authorities cover 8,400km<sup>2</sup>, which is just over 10% of Scotland's landmass. It is hugely diverse and includes areas which fall into every one of the Scottish Government's six-fold urban-rural classification. The total population of the SEStran area was estimated as 1,600,400 in 2022 (Scottish Census 2022). The majority of the population is concentrated in the centre of the SEStran area with a large, sparsely populated rural area to the south, particularly the remote rural areas in Scottish Borders and East Lothian. The greatest concentration of population is within the City of Edinburgh, which accounts for approximately 32% of the total SEStran region population.

The new RTS sits within a policy hierarchy which spans the national, regional and local levels. In particular, the RTS is has been developed within the policy framework provided by the National Transport Strategy 2 which was published in February 2020. It set out four strategic priorities, as well as defining a Sustainable Travel Hierarchy. These four priorities and hierarchy have been used to guide the development of this RTS.

The Partnership's Vision Statement is as follows:

A South-East of Scotland, fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets.

The 4 key strategy objectives are:

- Transitioning to a sustainable, post-carbon, transport system
- Facilitating healthier travel options
- Transforming public transport connectivity and access across the region
- Supporting safe, sustainable and efficient movement of people and freight across the region.

Now that the RTS has been approved, the Partnership's focus has moved from developing the RTS to working with partners to implement it.

This work takes various forms including:

- Collaborating with local authority partners to ensure that their Local Transport Strategies, Development Plans and related strategies or policies, all align with the RTS
- Leading on the development of strategies to help partners to tackle transport issues which can be more effectively addressed at a regional level
- Influencing senior stakeholders such as Scottish and UK governments, Transport Scotland, local authority partners, community planning partnerships, other RTPs, NHS, transport operators, and transport users' groups
- Building test cases for, and piloting, innovative solutions to transport problems, particularly where this would not be feasible for individual local authorities
- Seeking innovative funding mechanisms to support the delivery of priority projects
- Supporting on-the-ground delivery of regional projects by working with partners, consultants etc to develop detailed project plans and, where relevant, funding delivery of these plans.

### 4. Risks and Uncertainties

The principal risks and uncertainties faced by the Partnership fall into two main categories - financial and transport governance.

#### Financial Risks

Traditionally, the Partnership has had 4 main sources of funding:

- Annual grant funding from Transport Scotland
- Requisition from each of the eight local authority partners
- Funding for specific projects or activities e.g. Active Travel
- Funding from the European Union for collaborative projects with partners in other EU states.

The annual grant from Transport Scotland has remained at the same level for over a decade, but it has been reduced by 5% for 2024/25 in line with reductions across the Scottish Government. There is a real risk that there will be further reductions to this grant, which is designed to cover the Partnership's core costs, in 2025/26 and beyond.

Council requisitions have reduced by 10% over the same period. Transport Scotland has encouraged RTPs to increase the requisitions, but with council budgets already under significant pressure, any attempt to increase requisition is likely to meet with significant resistance.

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 4. Risks and Uncertainties (*continued*)

#### Financial Risks

Funding for specific projects has accounted for as much as 50% of the Partnership's overall income in recent years. As it not usually announced until part-way through each financial year, it does not form part of the budget process. Due to Scottish Government financial constraints, there is unlikely to be much, if any, ad hoc funding in 2024/25.

European Union funding has ceased entirely during 2022/23 and 2023/24, primarily due to the exit of the UK from the EU. There is a more positive outlook though, as the UK government has confirmed that UK organisations are eligible to bid for EU Horizon funding. The Partnership is a part of two consortia that will bid for funding for innovation projects in 2024/25.

By far the biggest change to RTP's funding, has resulted from Transport Scotland's Active Travel Transformation Programme, as a result of which RTPs are now responsible for the disbursement of all government-funded active travel behaviour change projects within their region. Previously, this role was undertaken by the third sector, but has not produced the desired outcome of significantly increased active travel participation rates.

From 2024/25, the Partnership will receive an additional £5.3m of grant funding – an effective quadrupling of typical annual income. Most will be passed through to local authorities or active travel delivery partners whose projects qualify for funding under the new grant standing orders and funding processes which have been approved by the Partnership. This will be the subject of the 2024/25 Internal Audit.

In line with guidance from Transport Scotland, the Partnership's internal capacity has been increased to ensure that the team undertaking this work is adequately resourced and resilient. For 2024/25 the team will be supported by external consultants, also in line with government guidance.

Given that 2024/25 is a transition year for this funding, now called the People and Place Plan, there is a likelihood that it will be refined in 2025/26. This could potentially involve the inclusion of other forms of sustainable travel and the incorporation of funds which are currently directly awarded to community organisations to sustain them through the transition. As such, this funding presents both a risk and an opportunity from 2025/26. The Partnership, in common with other RTPs, are attempting to influence Transport Scotland's thinking as far as possible.

The Partnership is also proactively seeking additional sources of funding - particularly from a number of funds aimed at innovation and digital innovation.

Costs have been subject to the highest level of inflation for a generation. Although the situation is improving, there is a real risk that staff salaries and pensions could increase beyond budgeted levels. The Partnership mitigates this risk by:

- Monitoring income and expenditure on a monthly basis and adjusting expenditure to ensure that there is no overspend
- Holding an appropriate cash reserve which can be used in the event that the above control is insufficient to prevent an overspend.

The Partnership's long-term financial sustainability was assessed by the City of Edinburgh Council's Internal Audit team in 2023/24. Apart from recommended changes to financial and budgeting processes, the audit report was very positive. In future, the Partnership will undertake scenario planning and sensitivity exercises as part of the budgeting process.

#### National approach to transport governance

Transport governance refers to the respective roles and responsibilities of Transport Scotland, the 7 Regional Transport Partnerships, 32 local authorities and selected other partners.

Over recent years, there has been much discussion. Successive independent reports have proposed that Transport Scotland should devolve much of its workload to other organisations which, due to superior knowledge of local requirements, may be better placed to prioritise and deliver projects in their region or local authority area.

This is both a risk and an opportunity to the Partnership. The recent transfer of People and Place responsibilities indicates that Transport Scotland has a degree of confidence in RTPs. The Partnership is aiming to build on this and actively engage with Transport Scotland about other matters where it believes it can make a significant positive impact.



# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (continued)

### 4. Risks and Uncertainties (continued)

#### National approach to transport governance (continued)

In addition, the seven RTPs have jointly developed a report titled 'Develop to Deliver' which examines the potential for RTPs to contribute more to achieving government transport policy. Feedback from Transport Scotland has been positive, and it is looking to form an officers' group, which will report directly to the Cabinet Secretary for Transport, to examine transport governance. RTPs will be represented on the officers' group in order to influence the future direction of transport governance, and the Partnership has indicated its enthusiasm for being directly involved.

### 5. Results for the Year

The Partnership is required to present its financial performance as a Comprehensive Income and Expenditure Statement. This can be seen on page 17.

The following is an extract from the Transport (Scotland) Act 2005, which established the Partnership; one of seven Scottish Regional Transport Partnerships (RTPs). It lays out the statutory remit of RTPs and puts the Corporate Strategy in context.

The net revenue budget of the Partnership in 2023/24 was £0.972m, funded by Government Grant (£0.782m) and Council Contributions (£0.190m). A comparison of the outturn position with the revenue budget and earmarked reserves of £0.159m carried forward from 2022/23 is shown in the table below. In summary:

- The Partnership had an underspend of £86,000 on the core revenue budget and £293,000 on the projects budget.
- The Core budget provides for the day-to-day running costs of the Partnership and includes employee costs, premises costs and supplies and services. The Partnership incurred net core service expenditure of £0.729m which was £86,000 below budget. The favourable variance arose from staff vacancies during the financial year.
- The Partnership incurred expenditure of £1.013m on revenue projects and received external grants and contributions of £0.990m. Net expenditure was £293,000 under budget, after inclusion of the earmarked reserve brought forward. The main favourable variances on the Projects revenue budget arose on the Sustainable Travel budget (£79,000), Active Travel budget (£157,000) and Bus Strategy Development budget (£40,000).

	Revised Budget £'000	Earmarked Reserves from 22/23 £'000	Total Available Funding £'000	Outturn £'000	Variance from Total Funding £'000
Core Service	815	0	815	734	(86)
Core Service - Interest Received	0	0	0	(5)	
Revenue Projects - Expenditure	923	162	1,085	1,013	(293)
Revenue Projects - Income	(766)	(3)	(769)	(990)	
<b>Total Expenditure 2023/24</b>	<b>972</b>	<b>159</b>	<b>1,131</b>	<b>752</b>	<b>(379)</b>
Government Grant	(782)	0	(782)	(782)	0
Constituent Council Requisitions	(190)	0	(190)	(190)	0
<b>Total Government Grant and Council Contributions 2023/24</b>	<b>(972)</b>	<b>0</b>	<b>(972)</b>	<b>(972)</b>	<b>0</b>

The Partnership was on track to spend the full Projects budget during 2023/24 until the requirement to deliver a new Scottish Government funded 'People and Place Plan' emerged in December 2023. This necessitated the short-term redeployment of key staff to engage intensively with Transport Scotland and other stakeholders for the remainder of 2023/24. This resulted in the postponement of some project work. Following completion of a recruitment and team restructuring exercise, it is forecast that the slippage on Project expenditure will be spent in 2024/25.

In accordance with the provisions of the Transport Scotland (2019) Act, the Partnership has agreed a Reserves Policy and established an unallocated reserve of £49,000. Slippage on project delivery from 2023/24 to 2024/25 will be managed by establishment of an earmarked balance, in accordance with the Partnership's Reserves Policy.

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 5. Results for the Year (*continued*)

#### Treasury Management

The Partnership has adopted the CIPFA Code of Practice on Treasury Management in the Public Sector. The Partnership maintains its bank account as part of the City of Edinburgh Council's group of bank accounts. Any cash balance is effectively lent to the Council and is offset by expenditure undertaken by the City of Edinburgh Council on behalf of the Partnership. Interest is given on month end net indebtedness between the Council and the Partnership. For 2023/24, interest of £5,157 was calculated in accordance with the (withdrawn) Local Authority (Scotland) Accounts Advisory Committee's Guidance Note 2 on Interest on Revenue Balances. The role of Treasury Management in the management of financial risks is referenced in Note 25.

#### Non Financial Results

##### Concordat between SEStran and the Edinburgh and South East Scotland City Region Deal

Perhaps the biggest deliverable in 2023/24 has been the improvement in the relationships between the Partnership and a number of key stakeholders – particularly the Edinburgh and South East Scotland City Region Deal team (ESES CRD).

This work culminated in the joint development and signing of a Concordat that:

- Demonstrates the commitment between the Partnership and ESESCRD to support further integrating economic development, transport and land use planning and delivery in the Edinburgh and South East Scotland city region
- Sets out how both bodies will align their activities to ensure that regional plans can deliver shared outcomes through targeted transport interventions
- Describes how new transport interventions will progress, from strategy to delivery, through the appropriate governance structure(s), depending on the activity.

The Concordat has already paved the way for a number of key, joint pieces of work including the RTS Delivery Plan and the Regional EV Strategy - both of which are described in more detail below.

##### Development of Strategies

Work commenced on the development of a number of key strategies to support partners to deliver regionally significant projects including a Regional Bus strategy, Travel to Healthcare Strategy, and Electric Vehicle Charging Infrastructure Strategy - all of which are detailed in the 'Future Developments' section of this report.

##### Go SEStran pilot

Mobility as a service (MaaS) is a type of service that enables users to plan, book, and pay for multiple types of mobility services through a combined platform. Transportation services from public and private transportation providers are combined through a unified gateway, usually via an app or website, that creates and manages the trip and payments, including subscriptions, with a single account. The key concept behind MaaS is to offer travellers flexible mobility solutions based on their travel needs, thus "mobility as a service" also refers to the broader concept of a shift away from personally-owned modes of transportation and towards mobility provided as a service.

Work on the Mobility as a Service (MaaS) project pilot, GO SEStran, was also completed with the final report informing national work on the potential for MaaS in Scotland.

##### Demand Responsive Transport (DRT)

Demand-responsive transport (DRT), is a form of shared private or quasi-public transport for individuals or groups traveling, where vehicles alter their routes each journey, based on actual transport demand without using a fixed route or timetabled journeys. These vehicles typically pick-up and drop-off passengers in locations according to passengers needs and can include taxis, buses or other vehicles. Passengers can typically summon the service with a mobile phone app or by telephone; telephone is particularly relevant to older users who may not be conversant with technology.

One objective in the Partnership's bid to the MaaS Investment Fund was to test how DRT and MaaS influence each other. After going out to procurement, the Partnership awarded a contract to The Routing Company to work in partnership with Prentice Coaches to create a new DRT route in East Lothian which went live in March 2023. This new DRT service was also integrated into the GoSEStran MaaS app.

##### Regional Freight Strategy

The regional freight study detailed options work was completed. As well as exploring ways to improve the existing regional freight network this study has developed draft business cases for modal shift from road to heavy and light rail.

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 5. Non Financial Results (*continued*)

#### Regional Freight Strategy (*continued*)

The study has assessed the potential impact of the three freight-related interventions: freight on trams, converted electric passenger trains and a multi-user freight train operating from Grangemouth. Following the Scottish Transport Appraisal Guidance (STAG), the costs, benefits and feasibility of options have been investigated and quantified, where possible. Overall, all three measures justify further investigation and ultimately the development of a Full Business Case to set out revenue and costs in more detail. The Partnership will be exploring this with partners further in 2024.

#### Bike sharing

The supplier of the GO-e-Bike system, Bewegen, went into liquidation in February 2023. As a result, the Partnership revised its approach to bike share, to look for an approach that would be lower cost, less at risk from vandalism and with the capacity to support multi-modal journeys. Brompton Bikes have been identified as offering a service that meets all the outlined requirements within the available budget. A contract was awarded for the work and sites were identified and groundworks started in the first quarter of 2024, the work will be completed by mid-2024 with the bikes available for use by the public.

#### Thistle Assistance and VoyagAR

VoyagAR is an end-to-end journey-planning and journey-tracking system to allow disabled people to utilise public transport in a safer, more convenient, and more enjoyable way. The system is designed to make disabled people feel more confident and comfortable when journeying on public transport services. The traveller accesses the system through a smartphone app. Appropriately authorised carers or family members can assist with journey planning and track the traveller's progress using a companion website. During a journey, the traveller receives wayfinding guidance and support at key points, using a flexible combination of digital mapping, simple directional indicators, and Augmented Reality.

In addition to the work on VoyagAR, the Partnership continued to promote the national Thistle Assistance Programme by coordinating the marketing campaign using the 'A Little Help Goes a Long Way' marketing creative which is placed in specialist audience publications and by engaging with key stakeholders to understand how staff employees are being engaged and made aware of the campaign.

#### Real-time passenger information

The Partnership has procured a single supplier framework agreement for RTPi screens, which is used by all local authority partners to purchase real-time signage. RTPi screens provide information about when buses are expected to arrive at a particular bus stop. As well as being a great aid to journey planning, this system actually helps to promote confidence in public transport among people who may otherwise not feel comfortable waiting for a bus.

All 330 RTPi screens within Edinburgh have now been replaced, and 15 different bus operators are now integrated into the system and displaying service information across the SEStran region.

Local Authorities within the SEStran region are continuing to purchase and install screens across their areas, through the Regional Framework contract so that travel information throughout the region is presented in a similar way.

In addition, the Partnership has been working with Local Authorities on designing a new module for bus stop integration using the Novus FX platform which will enhance the system and provide better standardisation of information across the region. When the design is finished this will be rolled out across the region.

#### Additional funding

For 2023/24, funding was successfully secured for the delivery of region-specific strategies, projects and services, including:

Funding Body	Title	Amount
Transport Scotland	Active Travel Grant	£652,579
Paths for All	Smarter Choices Smarter Places – GOSEStran	£91,265
Paths For All	Active Nation – Do the Ride Thing campaign	£86,532
Paths for All	Smarter Choices Smarter Places – Thistle Assistance marketing support	£20,000
Transport Scotland	Community Bus Fund	£150,000
Transport Scotland	Local Rail Development Fund – freight study	£41,157
<b>TOTAL</b>		<b>£1,041,533</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 6. Future Developments

2024/25 is shaping up to be a very exciting year for the Partnership.

#### RTS Delivery Plan

In addition to the many and varied projects delivering or supporting delivery of various aspects of the RTS, work is progressing to update the list of all current and planned transport projects in the region and to prioritise the projects based on a number of factors including:

- Scoring in a multi-criteria assessment which includes alignment with the RTS, NTS2 and STPR2 (the most recent Strategic Transport Projects Review)
- Land Use Planning
- Economic Growth.

The Partnership is working very closely with the ESES City Region team and, having aligned the transport strategies of the 2 organisations through the development of the previously mentioned Concordat, the RTS Delivery Plan now incorporates the CRD Transport Masterplan.

It is anticipated that the Delivery Plan will identify a shortlist of priority projects, most of which will be unfunded, and will provide the basis for funding conversations with stakeholders including the Scottish Government and Transport Scotland.

#### People and Place Plan

The RTPs were key stakeholders in a review of active travel funding undertaken by Transport Scotland. Over recent years, expenditure on active travel has increased exponentially while participation rates have remained at roughly the same level. The Active Travel Transformation Programme was designed to transform participation rates by:

- Redesigning the mechanism for allocating funding to, and construction of, active travel infrastructure – tasking local authorities with the concept and designs, and Transport Scotland for procurement of contractors and construction
- Moving the behaviour change element of active travel away from the 6 Active Travel Delivery Partners (ATDPs - Cycling UK, Cycling Scotland, Living Streets, Paths for All, Scottish Cycling and Sustrans) receiving and distributing the funds at a national level, to the devolution of the funds to RTPs, who have been asked to work with their partner Local Authorities to identify priorities and develop a plan for their region.

As a result, and after much hard work by the small active travel team at SEStran, the Partnership has been awarded £5.3m in additional funding (although this will be slightly offset by the loss of c.£0.5m of funding from a different active travel fund) and are working with partner local authorities and ATDPs to target improvements in the following areas:

- Schools and young people
- Workplaces
- Accessibility and inclusion
- Building capacity

The team has developed a 'People and Place Plan', supported by Grant Standing Orders and is working with an AI partner and Transport Scotland to devise a monitoring and evaluation dashboard which will demonstrate measurable improvements in participation rates.

The Partnership will also commission consultants to ensure that internal processes and procedures are strengthened over the coming year in order to drive further improvements in this area and ensure that Transport Scotland continues to support the new ways of working.

This change in approach also provides a very strong indication of the value that Transport Scotland places on RTPs. The Partnership is hopeful that this marks a move towards devolution of other transport priorities from Transport Scotland to RTPs.

#### Regional Bus Strategy

The Partnership has commissioned consultants to develop a regional bus strategy to:

- Explore the current state of the bus network in the SEStran region and develop a problem statement
- Identify gaps caused by the withdrawal of services or by the development of new housing schemes, destinations etc
- Consider the potential of the bus provisions of the Roads (Scotland) Act 2019 to improve the situation. These include bus service improvement partnerships, municipally owned bus services, bus franchising, and data sharing
- Propose a set of recommendations to address the problem statement

Work will continue throughout 2024/25. An Options Appraisal will be presented to the September meeting of the Partnership Board with the draft strategy being presented to the December meeting.

# The South East of Scotland Transport Partnership (SESTRAN)

## Management Commentary (*continued*)

### 6. Future Developments (*continued*)

#### Regional Electric Vehicle Charging Infrastructure Procurement

The Partnership is working with local authority partners, SWestrans, Transport Scotland the Scottish Futures Trust to explore a collaborative approach to the procurement of EV Charging Infrastructure.

This is mainly in order to prevent a repeat of the broadband rollout, where operators cherry-picked the most lucrative areas and many rural areas were left without a service.

Approval to commence the work has been gained from all local authorities, governance has been agreed, and a task force including legal, procurement, EV and financial expertise is being assembled to take the work forward.

Work is expected to conclude in September, when each local authority will make a decision on whether to procure collaboratively or to take a unilateral approach.

#### Travel to Healthcare

Lack of travel options is cited as one of the main reasons for people missing healthcare appointments, and this is likely to be worse in rural areas with higher levels of transport poverty. The Mobility and Access Commission produced a series of recommendations to address this in the Transport to Health and Social Care report in 2019.

Little has changed in the intervening period, although the Scottish Government is in the process of developing a Travel to Healthcare Plan. This work is currently in the early stages, and the requirements of RTPs are not clearly defined. Indeed, the current proposal misses the opportunities that RTPs can present to drive this agenda forward. As a result, the Partnership is forming a stakeholder network comprising the 4 NHS Boards in the SEStran region, NHS Assure, the Scottish Ambulance Service, the Community Transport Association, and a number of other groups.

The network will essentially be a coalition of the willing which will seek to share best practice, identify priorities and undertake tests of change to build evidence of successful initiatives. It is anticipated that both the network and programme portfolio will grow over time, and that the outputs and learnings will dovetail with the Travel To Healthcare Plan when that work is more mature.

#### Thistle Assistance VoyagAR

The VoyagAR app described above will be launched in 2024/25, when transfer of the Intellectual Property and development to date is transferred to a new provider.

#### Funding

The one downside is that, after over a decade of standstill funding from Transport Scotland, the Partnership's core grant has been reduced by 5% for 2024/25. This is in line with reductions across the Scottish Government and is a symptom of the very challenging financial environment.

The reduction of c.£39,000, can be accommodated within the budget for 2024/25 due to the carry forward from 2023/24.

The Partnership has met with and written to Transport Scotland, outlining the potential impact on the delivery of the RTS and, in particular, on some of the strategies referred to above. The Partnership has also asked whether this is a one-off reduction, or if reflects a new, lower baseline for future years. Given the current financial uncertainty, Transport Scotland is not yet in a position to respond to this question.

As mentioned earlier in this Commentary, the Partnership will continue to seek additional sources of funding to help offset current pressures.

It is considered appropriate to adopt a going concern basis for the preparation of the Annual Accounts, given ongoing Regional Transport Partnership grant funding provided by Scottish Ministers under Section 70 of the Transport (Scotland) Act 2001 and constituent councils obligation to meet the net expenses of the Partnership under Section 3 of the Transport (Scotland) Act 2005.

Chair of Partnership Board: SALLY PATTLE \_\_\_\_\_ Date signed:

Partnership Director: BRIAN BUTLER \_\_\_\_\_ Date signed:

Treasurer: RICHARD LLOYD-BITHELL, CPFA \_\_\_\_\_ Date signed:

# The South East of Scotland Transport Partnership (SESTRAN)

## STATEMENT OF RESPONSIBILITIES FOR THE ANNUAL ACCOUNTS

### The Partnership's Responsibilities

The Partnership is required:

- to make arrangements for the proper administration of its financial affairs and to secure that the proper officer has the responsibility for the administration of those affairs. In this Partnership, that officer is the Treasurer;
- to manage its affairs to secure economic, efficient and effective use of its resources and safeguard its assets;
- to ensure the Annual Accounts are prepared in accordance with legislation (The Local Authority Accounts (Scotland) Regulations 2014) and so far as is compatible with that legislation, in accordance with proper accounting practices (section 12 of the Local Government in Scotland Act 2003);
- to approve the Annual Accounts.

I confirm that the annual accounts were approved for signature by the South East of Scotland Transport Partnership at its Board meeting on 6th December 2024.

Chair of Partnership

Board:

SALLY PATTLE

\_\_\_\_\_ Date signed:

### The Treasurer's Responsibilities

The Treasurer is responsible for the preparation of the Partnership's Annual Accounts in accordance with proper practices as required by legislation and as set out in the CIPFA / LASAAC Code of Practice on Local Authority Accounting in the United Kingdom ('the Code').

In preparing the Annual Accounts, the Treasurer has:

- selected suitable accounting policies and then applied them consistently;
- made judgements and estimates that were reasonable and prudent;
- complied with legislation;
- complied with the Local Authority Accounting Code (in so far as it is compatible with legislation).

The Treasurer has also:

- kept adequate accounting records which were up to date;
- taken reasonable steps for the prevention and detection of fraud and other irregularities.

I certify that the Annual Accounts give a true and fair view of the financial position of the Partnership at the reporting date and the transactions of the Partnership for the year ended 31st March 2024.

Treasurer: RICHARD LLOYD-BITHELL, CPFA

\_\_\_\_\_ Date signed:

# The South East of Scotland Transport Partnership (SESTRAN)

## ANNUAL GOVERNANCE STATEMENT 2023/24

### 1. Scope of Responsibility

The Partnership's Vision Statement is for a South-East of Scotland, fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets.

The Partnership is responsible for ensuring that its business is conducted in accordance with the law and appropriate standards, that public money is safeguarded and properly accounted for and used economically, efficiently, effectively and ethically. The Partnership also has a duty to make arrangements to secure continuous improvement in the way its functions are carried out.

In discharging these overall responsibilities Elected Members and Senior Officers are responsible for implementing proper arrangements for the governance of the Partnership's affairs and facilitating the effective exercise of its functions, including arrangements for the management of risk.

The Partnership has approved and adopted a Local Code of Corporate Governance which is consistent with appropriate corporate governance principles and reflects the requirements of the "Delivering Good Governance in Local Government: Framework (2016)".

This Statement explains how the Partnership delivers good governance and reviews the effectiveness of these arrangements. It also includes a statement on internal financial control in accordance with proper practice.

The Partnership's financial management arrangements conform to the governance requirements of the CIPFA Statement on the Role of the Chief Financial Officer in Local Government (2016).

### 2. The Partnership's Governance Framework

The governance framework comprises the systems and processes, and culture and values, by which the Partnership is directed and controlled, and its activities through which it accounts to, engages with and influences the community. It enables the Partnership to monitor the achievement of its strategic objectives and to consider whether those objectives have led to the delivery of appropriate, cost-effective services.

The framework reflects the arrangements in place to meet the six supporting principles of effective corporate governance:

- Focusing on the purpose of the Partnership and on outcomes for the community, and creating and implementing a vision for the local area;
- Members and officers working together to achieve a common purpose with clearly defined functions and roles;
- Promoting values for the Partnership and demonstrating the values of good governance through upholding high standards of conduct and behaviour;
- Taking informed and transparent decisions which are subject to effective scrutiny and managing risk;
- Developing the capacity and capability of members and officers to be effective;
- Engaging with local people and other stakeholders to ensure robust public accountability.

A significant part of the governance framework is the system of internal control which is based on an ongoing process designed to identify and manage the risks to the achievement of the Partnership's policies, aims and objectives. These are defined in the Partnership's Business Plan, which is updated annually. This enables the Partnership to manage its key risks efficiently, effectively, economically and ethically.

The Partnership aims for compliance with Public Sector Equality Duties, including Scottish Specific Duties.

Within the overall control arrangements the system of internal financial control is intended to ensure that assets are safeguarded, transactions are authorised and properly recorded, and material errors or irregularities are either prevented or would be detected within a timely period. It is based on a framework of regular management information, financial regulations, administrative procedures and management supervision.

# The South East of Scotland Transport Partnership (SESTRAN)

## ANNUAL GOVERNANCE STATEMENT 2023/24 *(continued)*

### 2. The Partnership's Governance Framework *(continued)*

While the system of internal control is designed to manage risk at a reasonable level it cannot eliminate all risk of failure to achieve policies, aims and objectives and can therefore only provide reasonable, and not absolute, assurance of effectiveness.

### 3. Determining the Partnership's purpose, its vision for the local area and intended outcomes for the Community

The Partnership's Vision Statement is for a South-East of Scotland, fully integrated transport system that will be efficient, connected and safe; create inclusive, prosperous and sustainable places to live, work and visit; be affordable and accessible to all, enabling people to be healthier; and delivering the region's contribution to net zero emissions targets.

The Business Plan defines how to implement the aims of this strategy and the Annual Report provides a report of performance against objectives, targets and performance indicators as outlined in the Regional Transport Strategy.

### 4. Review of Effectiveness

The Partnership has put in place arrangements, detailed in the Local Code, for monitoring each element of the framework and providing evidence of compliance. A Principal Officer within the Partnership has been nominated to review the effectiveness of the Local Code.

The review of the effectiveness of its governance framework, including the system of internal financial control is informed by:

- the work of Internal Audit on the adequacy and effectiveness of the Partnership's control environment, governance and risk management frameworks;
- the Partnership Director's Certificate of Assurance on internal control;
- the operation and monitoring of controls by Partnership managers;
- the External Auditors in their Annual Audit Letter and other reports; and
- other inspection agencies comments and reports.

Through the year Elected Members and Officers have responsibility for the development and maintenance of the governance environment. These review mechanisms include:

- **The Partnership Board**, which provides strategic leadership, determines policy aims and objectives and takes executive decisions not delegated to officers. It provides political accountability for the Partnership's performance;
- **The Performance and Audit Committee**, which demonstrates the Partnership's commitment to the principles of good governance, undertaking the core functions of an audit committee as identified in Audit Committees: Practice Guidance for Local Authorities and Policy (CIPFA);
- **The Internal Audit Service** of the City of Edinburgh Council provides an independent and objective assurance service to the Partnership, by completing one review in each financial year that is focused on the adequacy and effectiveness of controls established to manage a key risk of the Partnership. The Partnership seeks to ensure that Internal Audit arrangements conform with the governance requirements of the CIPFA Statement on the Role of the Head of Internal Audit.
- **The External Auditor's Annual Audit Report** is considered by the Partnership Board and the Performance and Audit Committee, along with the output from other external audits and inspections;
- **The risk management system** requires that risks are regularly reviewed by the Performance and Audit Committee and Board. This ensures that actions are taken to effectively manage the Partnership's highest risks;



# The South East of Scotland Transport Partnership (SESTRAN)

## ANNUAL GOVERNANCE STATEMENT 2023/24 (continued)

### 4. Review of Effectiveness (continued)

- **The Partnership Secretary** is responsible to the Partnership for ensuring that agreed procedures are followed. The Partnership has a contractual arrangement with an external Legal Services provider to ensure all applicable statutes and regulations are complied with.
- The Partnership operates Anti-Bribery, Anti-Fraud and Corruption policies in accordance with the CIPFA Code of Practice on Managing the Risk of Fraud and Corruption.
- **CIPFA Financial Management Code**  
A requirement of the Annual Governance Statement is to disclose compliance with the CIPFA Financial Management (FM) Code and identify any outstanding areas for improvement or change. The Code is designed to support good practice and assist local government organisations in demonstrating their financial sustainability and resilience, by setting out expected standards of financial management.  
The Partnership has undertaken an evaluation of compliance with the Financial Management Code.  
The Partnership's financial management arrangements are assessed as being compliant with the FM Code.

### 5. Procurement Procedures

During 2023/24, the Partnership's legal advisers were engaged to review the Partnership's procurement procedures. All the Partnership's Standing Orders were reviewed and strengthened in 2023/24 and 2024/25, including Contract Standing Orders. The most recent review of the Partnership's Corporate Procurement Strategy was in March 2023. The Strategy will be reviewed again by March 2025. Revised Procurement procedures and processes have been drafted, with the intention of seeking Board approval by March 2025.

### 6. Internal Audit Opinion

The City of Edinburgh Council Internal Audit Service undertakes one annual review each year to provide assurance over the controls established by the Partnership to mitigate specific key risks. During 2023/24, the Internal Audit Service undertook a review to assess the adequacy of the design and operating effectiveness of the key controls in place to support the ongoing financial sustainability of the Partnership. The Review found the design and effectiveness of the controls in place to ensure the Partnership's continued financial sustainability provide reasonable assurance that financial sustainability objectives will be achieved. Management actions have been identified to address improvement actions identified during the Review. The audit also performed a follow-up review to confirm that management had implemented the actions agreed in the 2022/23 internal audit review of the Thistle Assistance Programme.

Due to the 2023/24 review being focussed on the key controls in place to support the ongoing financial sustainability of the Partnership, an internal audit annual opinion is not given on the Partnership's overall governance arrangements. As the Partnership uses the financial systems of City of Edinburgh Council, assurance is placed on work undertaken by Internal Audit on the City of Edinburgh Council's financial systems.

### 7. Certification

In compliance with accounting practice, the Treasurer has provided the Partnership Director with a statement on the adequacy and effectiveness of the Partnership's internal financial control system for the year ended 31st March 2024. It is the Treasurer's opinion that reasonable assurance can be placed upon the adequacy and effectiveness of the Partnership's internal control system.

8. From this year's review, there is reasonable assurance that the Local Code of Corporate Governance is operating adequately, with overall compliance by the Partnership with its corporate governance arrangements.
9. The Partnership's governance arrangements and systems are confirmed as being operational and current at the date of signing of this Annual Governance Statement.

Chair of Partnership

Board: SALLY PATTLE \_\_\_\_\_ Date signed:

Partnership Director:

BRIAN BUTLER \_\_\_\_\_ Date signed:

# The South East of Scotland Transport Partnership (SESTRAN)

## REMUNERATION REPORT

### 1. Audit of Remuneration Report

The tables at sections 5, 6, 7 and 8 on pages 14 and 15 in the Remuneration Report have been audited by the Partnership's external auditor. The other sections in the Remuneration Report have been reviewed by the external auditor to identify material inconsistencies with the financial statements, or is inconsistent with knowledge obtained in the course of the audit, or otherwise appears to be materially misstated.

### 2. Remuneration Policy for Senior Employees

The Partnership Board determines remuneration for senior employees with reference to the level of responsibility of the post. The Partnership does not operate a Remuneration Committee. Annual inflationary increases are based on those agreed by the Scottish Joint Negotiating Committee (SJNC) for Local Authority services.

### 3. Remuneration for Senior Councillors

The Partnership does not provide any remuneration to senior councillors. Expenses paid to Board members are detailed in note 19 to the annual accounts.

### 4. Management of Remuneration Arrangements

The remuneration of the Partnership's employees is administered by the City of Edinburgh Council, as part of a service level agreement with the Partnership.

### 5. Officers Remuneration

The numbers of employees whose remuneration during the year exceeded £50,000 were as follows:

Remuneration Bands	2023/24	2022/23
£50,000 - £54,999	1	0
£60,000 - £64,999	1	1
£65,000 - £69,999	0	1
£90,000 - £94,999	1	0

### 6. Senior Employees Remuneration

The remuneration paid to the Partnership's senior employees is as follows:

Name and Post Title	Salary, Fees and Allowances £	Total Remuneration 2023/24 £	Total Remuneration 2022/23 £
Jim Grieve - Partnership Director (to 31 December 2022)	0	0	68,758
Brian Butler - Partnership Director (from 12 December 2022)	92,787	92,787	26,262
	92,787	92,787	95,020

The senior employees detailed above have/ had responsibility for management of the Partnership to the extent that they have power to direct or control the major activities of the Partnership (including activities involving the expenditure of money), during the year to which the Remuneration Report relates, whether solely or collectively with other persons.

### 7. Senior Employees Pension Entitlement

The pension entitlement of the Partnership's senior employee(s) is as follows:

Name and Post Title	In-year pension contributions			Accrued pension benefits	
	2023/24 £	2022/23 £		As at 31 March 2024 £'000	Difference from 31 March 2023 £'000
Jim Grieve - Partnership Director (to 31/12/22)	0	15,549	Pension	0	5
			Lump Sum	0	0
Brian Butler - Partnership Director (from 12/12/22)	30,713	5,962	Pension	2	2
			Lump Sum	0	0
	30,713	21,511			

# The South East of Scotland Transport Partnership (SESTRAN)

## REMUNERATION REPORT *(continued)*

### 7. Pension Entitlement

Pension benefits for the Partnership's employees are provided through the Local Government Pension Scheme (LGPS).

For the Partnership's employees, the Local Government Pension Scheme (LGPS) became a career average pay scheme on 1 April 2015. Benefits built up to 31 March 2015 are protected and based on final salary. Accrued benefits from 1 April 2015 will be based on career average salary.

The scheme's normal retirement age for employees is linked to the state pension age (but with a minimum of age 65).

From 1 April 2009 a five tier contribution system was introduced with contributions from scheme members being based on how much pay falls into each tier. This is designed to give more equality between the cost and benefits of scheme membership. Prior to 2009 contributions rates were set at 6% for all non-manual employees.

The tiers and members contributions rates for 2023-24 were as follows:

Whole Time Pay	Contribution rate
On earnings up to and including £25,300 (2022/2023 £23,000)	5.50%
On earnings above £25,300 and up to £31,000 (2022/2023 £23,000 to £28,100)	7.25%
On earnings above £31,000 and up to £42,500 (2022/2023 £28,100 to £38,600)	8.50%
On earnings above £42,500 and up to £56,600 (2022/2023 £38,600 to £51,400)	9.50%
On earnings above £56,600 (2022/2023 £51,400)	12.00%

From April 2015, when allocating contribution rates to members, pensionable pay means the actual pensionable pay, regardless of hours worked.

There is no automatic entitlement to a lump sum for members who joined the scheme post April 2009. Members may opt to give up (commute) pension for lump sum or bigger lump sum up to the limit set by the Finance Act 2004.

The value of the accrued benefits has been calculated on the basis of the age at which the person will first become entitled to receive a pension on retirement without reduction on account of its payment at that age; without exercising any option to commute pension entitlement into a lump sum; and without any adjustment for the effects of future inflation - assuming that the person left the related employment or service as at 31st March in the year to which the value relates.

### 8. Exit Packages

Exit packages include compulsory and voluntary redundancy costs, pension contributions in respect of added years, ex-gratia payments and other departure costs.

Exit Package Cost Band	Number of Compulsory Redundancies		Number of Other Agreed Departures		Total Number of Exit Packages by Cost Band		Total Cost of Exit Packages in Each Band	
							£'000	£'000
All Cost Bands	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0

### 9. Trade Union (Facility Time Publication Requirements) Regulations 2017

The Partnership is required to report information on facility time made available to employees who are trade union representatives. For 2023/24, no individual spent time during the year on trade union-related activities.

Chair of Partnership

Board: SALLY PATTLE \_\_\_\_\_ Date signed :

Partnership Director: BRIAN BUTLER \_\_\_\_\_ Date signed :

# The South East of Scotland Transport Partnership (SESTRAN)

## MOVEMENT IN RESERVES STATEMENT

This statement shows the movement in the year on different reserves held by the Partnership, analysed into "Usable Reserves" (that is, those that can be applied to fund expenditure) and "Unusable Reserves". The Surplus or (Deficit) on the Provision of Services line shows the true economic cost of providing the Partnership's services, more details of which are shown in the Comprehensive Income and Expenditure Statement. These are different from the statutory amounts required to be charged to the General Fund Balance before any discretionary transfers to or from earmarked reserves undertaken by the Partnership.

### 2022/23 - Previous Year Comparative

	Usable Reserves		Unusable Reserves	Total Partnership Reserves
	General Fund Balance	Total Usable Reserves		
	£'000	£'000	£'000	£'000
<b>Opening Balances at 1 April 2022</b>	<b>162</b>	<b>162</b>	<b>(421)</b>	<b>(259)</b>
<b>Movement in reserves during 2022/23</b>				
Surplus or (Deficit) on Provision of Services	34	34	0	34
Other Comprehensive Expenditure and Income	0	0	653	653
<b>Total Comprehensive Expenditure and Income</b>	<b>34</b>	<b>34</b>	<b>653</b>	<b>687</b>
<b>Adjustments between accounting basis &amp; funding basis under regulations (Note 7)</b>	<b>12</b>	<b>12</b>	<b>(12)</b>	<b>0</b>
<b>Increase/Decrease in 2022/23</b>	<b>46</b>	<b>46</b>	<b>641</b>	<b>687</b>
<b>Balance at 31 March 2023 carried forward</b>	<b>208</b>	<b>208</b>	<b>220</b>	<b>428</b>

### 2023/24 - Current Financial Year

	Usable Reserves		Unusable Reserves	Total Partnership Reserves
	General Fund Balance	Total Usable Reserves		
	£'000	£'000	£'000	£'000
<b>Opening Balances at 1 April 2023</b>	<b>208</b>	<b>208</b>	<b>220</b>	<b>428</b>
<b>Movement in reserves during 2023/24</b>				
Surplus or (Deficit) on Provision of Services	223	223	0	223
Other Comprehensive Expenditure and Income	0	0	(48)	(48)
<b>Total Comprehensive Expenditure and Income</b>	<b>223</b>	<b>223</b>	<b>(48)</b>	<b>175</b>
<b>Adjustments between accounting basis &amp; funding basis under regulations (Note 7)</b>	<b>(3)</b>	<b>(3)</b>	<b>3</b>	<b>0</b>
<b>Increase/Decrease in 2023/24</b>	<b>220</b>	<b>220</b>	<b>(45)</b>	<b>175</b>
<b>Balance at 31 March 2024 carried forward</b>	<b>428</b>	<b>428</b>	<b>175</b>	<b>603</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## COMPREHENSIVE INCOME AND EXPENDITURE STATEMENT 2023/24

This statement shows the accounting cost in the year of providing services in accordance with generally accepted accounting practices, rather than the amount to be funded by government grant, council requisitions and other income.

2022/23 RESTATED *				2023/24		
Gross Expenditure £'000	Gross Income £'000	Net Expenditure £'000	Services	Gross Expenditure £'000	Gross Income £'000	Net Expenditure £'000
711	(1)	710	Core	749	0	749
1,262	(1,053)	209	Projects	996	(990)	6
<b>1,973</b>	<b>(1,054)</b>	<b>919</b>	<b>Cost Of Services</b>	<b>1,745</b>	<b>(990)</b>	<b>755</b>
96	(77)	19	Financing & Investment Income (Note 9)	142	(148)	(6)
0	(972)	(972)	Taxation and Non-Specific Grant Income (Note 10)	0	(972)	(972)
<b>2,069</b>	<b>(2,103)</b>	<b>(34)</b>	<b>(Surplus) or Deficit on Provision of Services</b>	<b>1,887</b>	<b>(2,110)</b>	<b>(223)</b>
			<b>Other Comprehensive Income and Expenditure</b>			
0	(23)	(23)	Change in Demographic Assumptions	0	(48)	(48)
0	(1,519)	(1,519)	Change in Financial Assumptions	0	(164)	(164)
0	647	647	Changes in the effect of the asset ceiling	0	(68)	(68)
228	0	228	Other Experience	369	0	369
14	0	14	Return on Assets excluding amounts included in net interest	0	(41)	(41)
<b>242</b>	<b>(895)</b>	<b>(653)</b>	<b>Total Other Comprehensive Income and Expenditure</b>	<b>369</b>	<b>(321)</b>	<b>48</b>
<b>2,311</b>	<b>(2,998)</b>	<b>(687)</b>	<b>Total Comprehensive Income and Expenditure</b>	<b>2,256</b>	<b>(2,431)</b>	<b>(175)</b>

\* Both Projects expenditure and income have been reduced by £0.094m to remove agency income/ expenditure.

# The South East of Scotland Transport Partnership (SESTRAN)

## BALANCE SHEET

The Balance Sheet shows the value as at the Balance Sheet date of the assets and liabilities recognised by the Partnership. The net assets of the Partnership (assets less liabilities) are matched by the reserves held by the Partnership. Reserves are reported in two categories. The first category of reserves are usable reserves, that is, those reserves that the Partnership may use to provide services, subject to the need to maintain a prudent level of reserves and any statutory limitations on their use. The second category of reserves are those that the Partnership is not able to use to provide services. This category of reserves include reserves that hold unrealised gains and losses (for example, the Capital Adjustment Account Reserve), where amounts would only become available to provide services if the assets are sold; and reserves that hold timing differences shown in the Movement in Reserves Statement line "Adjustments between accounting basis and funding basis under regulations".

31 March 2023 £'000		Note	31 March 2024 £'000
231	Property, plant and equipment	11	189
0	Other long-term assets (Pensions)	24	0
<b>231</b>	<b>Long term assets</b>		<b>189</b>
1,145	Short-term debtors	13	741
0	Provision for Bad Debts	14	0
227	Cash and cash equivalents	15	228
<b>1,372</b>	<b>Current assets</b>		<b>969</b>
(15)	Contributions and Grants Received in Advance		0
(1,160)	Short-term creditors	16	(555)
<b>(1,175)</b>	<b>Current liabilities</b>		<b>(555)</b>
<b>0</b>	<b>Long-term liabilities</b>		<b>0</b>
<b>428</b>	<b>Net assets/ (liabilities)</b>		<b>603</b>
	<b>Financed by:</b>		
208	Usable reserves	17	428
220	Unusable reserves	18	175
<b>428</b>	<b>Total reserves</b>		<b>603</b>

The unaudited Annual Accounts were issued on the 14th June 2024.

The audited Annual Accounts were authorised for issue by Richard Lloyd-Bithell on 6th December 2024

Treasurer: RICHARD LLOYD-BITHELL, CPFA

Date signed: \_\_\_\_\_

# The South East of Scotland Transport Partnership (SESTRAN)

## CASH FLOW STATEMENT

The Cash Flow Statement shows the changes in cash and cash equivalents of the Partnership during the reporting period. The statement shows how the Partnership generates and uses cash and cash equivalents by classifying cash flows as operating, investing and financing activities. The amount of net cash flow arising from operating activities is a key indicator of the extent to which the operations of the Partnership are funded by way of government grant income, council requisitions and other receipts and contributions for services provided by the Partnership. Investing activities represent the extent to which cash outflows have been made for resources which are intended to contribute to the Partnership's future service delivery. Cash flows arising from financing activities are useful in predicting claims on future cash flows by providers of capital (that is, borrowing) to the Partnership.

31 March 2023 £'000	31 March 2023 £'000		31 March 2024 £'000	31 March 2024 £'000
		<b>OPERATING ACTIVITIES</b>		
(782)		Government Grants	(782)	
(190)		Constituent Council Requisitions	(190)	
0		Interest paid/ (received)	2	
(971)		Other receipts from operating activities	(1,871)	
	<b>(1,943)</b>	<b>Cash inflows generated from operating activities</b>		<b>(2,841)</b>
494		Cash paid to and on behalf of employees	585	
1,317		Cash paid to suppliers of goods and services	2,121	
	<b>1,811</b>	<b>Cash outflows generated from operating activities</b>		<b>2,706</b>
	<b>(132)</b>	<b>Net cash flows from operating activities</b>		<b>(135)</b>
		<b>INVESTING ACTIVITIES</b>		
0		Purchase of property, plant and equipment	134	
0		Proceeds from the sale of property, plant and equipment	0	
	<b>0</b>	<b>Net cash flows from investing activities</b>		<b>134</b>
		<b>FINANCING ACTIVITIES</b>		
0		Other receipts from financing activities	0	
	<b>0</b>	<b>Net cash flows from financing activities</b>		<b>0</b>
	<b>(132)</b>	<b>Net( increase)/ decrease in cash and cash equivalents</b>		<b>(1)</b>
	<b>95</b>	<b>Cash and cash equivalents at the beginning of the reporting period</b>		<b>227</b>
	<b>227</b>	<b>Cash and cash equivalents at the end of the reporting period (Note 15)</b>		<b>228</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 1. STATEMENT OF ACCOUNTING POLICIES

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#### 1.1 Accounting Policies

The Annual Accounts have been prepared in accordance with the International Financial Reporting Standards (IFRS) based Code of Practice in the United Kingdom (the Code). This is to ensure that the Annual Accounts "present a true and fair view" of the financial position and transactions of the Partnership.

The Annual Accounts have been prepared on an historic cost basis, modified by the valuation of pension assets and liabilities and property, plant and equipment, where appropriate.

#### 1.2 Revenue Expenditure

Revenue expenditure is that which does not yield benefit beyond the year of account. In broad terms the revenue expenditure of the Partnership can be divided into two categories:

- employees;
- day-to-day operating expenses, includes costs incurred in respect of office accommodation transport, ICT, and project expenditure.

#### 1.3 Revenue Income

Revenue income is that which does not yield benefit beyond the year of account. In broad terms the revenue income of the Partnership can be divided into the following categories:

- Council requisitions, which fund day to day expenditure;
- European Union, Scottish Government and other grant income awarded to fund specific projects;
- other income recoveries to fund specific projects.

#### 1.4 Accruals of Expenditure and Income

The revenue account has been prepared on an accruals basis in accordance with the Code of Practice. Amounts estimated to be due to or from the Partnership, which are still outstanding at the year end, are included in the accounts. Government Grants have been accounted for on an accruals basis.

#### 1.5 Operating Leases

##### a) *Leased-in assets*

Rental payments under operating leases are charged to the Comprehensive Income and Expenditure Statement on a straight line basis over the life of the lease.

##### b) *Leased-out assets*

The Partnership has not identified any leased-out assets that fall under the definition of operating leases.

#### 1.6 Overheads

The cost of service in the Comprehensive Income and Expenditure Statement includes the Partnership's overheads.

#### 1.7 Charges to the Comprehensive Income and Expenditure Statement for use of non-current assets

Charges are made to the Comprehensive Income and Expenditure Statement for the use of non-current assets, through depreciation charges. The aggregate charge to individual services is determined on the basis of the assets used in each service.



# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 1. STATEMENT OF ACCOUNTING POLICIES *(continued)*

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#### 1.8 Employee Benefits

##### Pensions

The Partnership is an admitted body to the Local Government Pension Scheme (LGPS) which is administered by Lothian Pension Fund. The LGPS is a defined benefit statutory scheme, administered in accordance with the Local Government Pension Scheme (Scotland) Regulations 1998, as amended.

The Annual Accounts have been prepared including pension costs, as determined under International Accounting Standard 19 – Employee Benefits (IAS 19). The cost of service in the Comprehensive Income and Expenditure Statement includes expenditure equivalent to the amount of retirement benefits the Partnership has committed to during the year. Pensions interest cost and the expected return on pension assets have been included in the “Surplus or Deficit on the Provision of Services” within the Comprehensive Income and Expenditure Statement.

The pension costs charged to the Comprehensive Income and Expenditure Statement in respect of employees are not equal to contributions paid to the funded scheme for employees. The amount by which pension costs under IAS19 are different from the contributions due under the pension scheme regulations are disclosed in the Movement in Reserves Statement for the General Fund.

Pension assets have been valued at bid value (purchase price), as required under IAS19.

Under pension regulations, contribution rates are set to meet 100% of the overall liabilities of the Fund.

##### Accruals of Holiday Leave

Cost of service includes a charge for annual leave to which employees are entitled, but have not taken as at the Balance Sheet date. The Partnership is not required to raise requisitions on constituent councils to cover the cost of accrued annual leave. These costs are therefore replaced by revenue provision in the Movement in Reserves Statement for the General Fund balance by way of an adjusting transaction with the Accumulated Absence Account.

#### 1.9 Non Current Assets

##### Property, Plant and Equipment

Property, Plant and Equipment is categorised into the following classes:

- Vehicles, plant and equipment;
- Assets under construction;

##### Recognition:

- Expenditure on the acquisition, creation or enhancement of Property, Plant and Equipment has been capitalised on an accruals basis;

##### Depreciation:

- Depreciation is provided on all Property, Plant and Equipment;
- The Partnership provides depreciation on its Property, Plant and Equipment from the month when it comes into use. Thereafter depreciation is provided on a straight line basis over the expected life of the asset. No depreciation is provided on Assets Under Construction.

##### Measurement:

Property, Plant and Equipment are included in the Balance Sheet at the lower of net current replacement cost or net realisable value in existing use, net of depreciation.

#### 1.10 Government Grants and Other Contributions

##### Revenue

Revenue grants and other contributions have been included in the financial statements on an accruals basis.

Where such funds remain unapplied at the Balance Sheet date, but approval has been given to carry these funds forward to the next financial year, the funds have been accrued.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 1. STATEMENT OF ACCOUNTING POLICIES (*continued*)

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#### 1.1 Government Grants and Other Contributions (*continued*)

##### Capital

Capital grants and contributions are recognised in the Comprehensive Income and Expenditure Statement, except to the extent there are conditions attached to them that have not been met.

Where there are no conditions attached to capital grants and contributions, these funds are a reconciling item in the Movement in Reserves Statement by way of an adjusting transaction with the capital adjustment account where expenditure has been incurred and the unapplied capital grants account, where expenditure has not been incurred.

Where there are outstanding conditions attached to capital grants and contributions that have not been met by the Balance Sheet date, the grant or the contribution will be recognised as part of capital grants in advance. Once the condition has been met, the grant or contribution will be transferred from capital grants received in advance and recognised as income in the Comprehensive Income and Expenditure Statement.

#### 1.11 Provisions

Provisions are made for liabilities of uncertain timing or amount that have been incurred.

The value of provisions is based upon the Partnership's obligations arising from past events, the probability that a transfer of economic benefit will take place, and a reasonable estimate of the obligation.

#### 1.12 Reserves

Reserves held on the Balance Sheet are classified as either usable or unusable. Unusable reserves cannot be applied to fund expenditure. The Transport Scotland (2019) Act permits the Partnership to operate a usable reserve. In March 2020 a Reserves Policy was approved, permitting the Partnership to hold a general reserve with a minimum value of 5% of annual Core budget. Balances held in excess of 5% require to be reviewed annually in-line with risk/identified commitments. The Partnership also operates a General Fund reserve to manage slippage on approved Project budget delivery.

The Partnership operates the following unusable reserves:

##### a) Pension Reserve

The Partnership operates a Pensions Reserve Fund under the terms of the Local Government Pension Reserve Fund (Scotland) Regulations 2003. The Pension Reserve represents the net monies which the Partnership requires to meet its net pension liability, or is the value of the net pension asset, as calculated under IAS 19, Employee Benefits;

##### b) Capital Adjustment Account

The Capital Adjustment Account represents movement in the funding of assets arising either from capital resources such as capital receipts, or capital funded directly from revenue contributions;

##### c) Accumulated Absences Account

This represents the net monies which the Partnership requires to meet its short-term compensated absences for employees under IAS19.

#### 1.13 Financial Instruments

##### Financial Assets

Loans and receivables are initially measured at fair value and carried at their amortised cost. Annual credits to the Comprehensive Income and Expenditure Statement for interest receivable are based on the carrying amount of the asset multiplied by the effective rate of interest for the instrument.

Surplus funds held on behalf of the Partnership are managed by the City of Edinburgh Council under a formal management agreement in a pooled investment arrangement.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 1. STATEMENT OF ACCOUNTING POLICIES *(continued)*

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#### 1.14 Cash and Cash Equivalents

Cash and cash equivalents include:

- Credit and debit funds held in banks

#### 1.15 Contingent Liabilities

A contingent liability arises where an event has taken place that gives the Partnership a possible obligation whose existence will only be confirmed by the occurrence or otherwise of uncertain future events not wholly within the control of the Partnership.

Contingent liabilities are not recognised in the Balance Sheet but disclosed in a note to the accounts.

#### 1.16 Value Added Tax

VAT payable is included as an expense only to the extent that it is not recoverable from Her Majesty's Revenue and Customs.

#### 1.17 Events After the Reporting Period

Events after the reporting period are those events, both favourable and unfavourable, that occur between the end of the reporting period and the date when the Annual Accounts are authorised for issue.

Two types of events can be identified:

- i) those that provide evidence of conditions that existed at the end of the reporting period - the Annual Accounts are adjusted to reflect such events;
- ii) those that are indicative of conditions that arose after the reporting period - the Annual Accounts are not adjusted to reflect such events, but where a category of events would have a material effect, disclosure is made in the notes of the nature of the events and their estimated financial effect.

Events taking place after the date of authorisation for issue are not reflected in the Annual Accounts.

#### 1.18 Short Term Debtors and Short Term Creditors

The revenue transactions of the Partnership are recorded on an accruals basis which means that amounts due to or from the Partnership, but still outstanding at the year end, are included in the accounts. Where there was insufficient information available to provide actual figures, estimates have been included.

#### 1.19 Changes in Accounting Policies and Estimates and Errors

Changes in accounting policies are only made when required by proper accounting practices or the change provides more reliable or relevant information about the effect of transactions, other events and conditions on the Partnership's financial position or performance.

Changes in accounting estimates are accounted for prospectively; i.e. in the current and future years affected by the change.

Material errors discovered in prior period figures are corrected retrospectively by amending opening balances and comparative amounts for the prior period.

#### 1.20 Going Concern

It is considered appropriate to adopt a going concern basis for the preparation of the Annual Accounts, given ongoing Regional Transport Partnership grant funding provided by Scottish Ministers under Section 70 of the Transport (Scotland) Act 2001 and constituent councils obligation to meet the net expenses of the Partnership under Section 3 of the Transport (Scotland) Act 2005.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### **2. ACCOUNTING STANDARDS THAT HAVE BEEN ISSUED BUT NOT YET ADOPTED**

The Code requires the disclosure of information relating to the impact of an accounting change that will be required by a new standard that has been issued but not yet adopted by the Code for the relevant financial year. The standards introduced by the 2024/25 Code where disclosures are required in the 2023/24 financial statements in accordance with the requirements of paragraph 3.3.4.3 of the Code are:

- IFRS 16 Leases issued in January 2016;
- Classification of Liabilities as Current or Non-current (Amendments to IAS 1) issued in January 2020;
- Lease Liability in a Sale and Leaseback (Amendments to IFRS 16) issued in September 2022;
- Non-current Liabilities with Covenants (Amendments to IAS 1) issued in October 2022;
- International Tax Reform: Pillar Two Model Rules (Amendments to IAS 12) issued in May 2023;
- Supplier Finance Arrangements (Amendments to IAS 7 and IFRS 7) issued in May 2023.

The Partnership's current lease agreements are detailed in Note 2. These agreements will be assessed in preparation for adoption of IFRS16 leases. For the remaining standards introduced by the 2024/25 Code, there is currently no information known on the potential impact that application of the new standards will have on the Board's financial statements.

### **3. CRITICAL JUDGEMENTS IN APPLYING ACCOUNTING POLICIES**

In applying the accounting policies set out in Note 1, the Partnership has had to make certain judgements about complex transactions or those involving uncertainty about future events.

The critical judgements made in the Annual Accounts are:

- There is high degree of uncertainty about future levels of funding for local government. The Partnership has determined that this uncertainty is not yet sufficient to provide an indication that the Partnership's assets might be impaired as a result of a need to reduce service provision;
- Section 37 confirmations (Virgin Media vs NTL Pension Trustees II Limited ruling) - the Partnership's actuary has made no additional allowance for this initial legal judgement from July 2023 due to:
  - >the ruling only applying to the above-named private sector pension scheme;
  - > the legal judgement is currently being appealed;
  - > it is unknown whether there would be any potential remedy required to public service schemes;
  - > it is unknown what the impact of any potential remedy would be;
  - > it is unknown whether Section 37 certificates exist for prior scheme amendments.
- Local Government Pension Scheme - Guaranteed minimum pension (GMP). The interim solution to avoid inequalities between men and women's benefits following the introduction of the Single State Pension in 2016 resulted in a recalculation of pension liabilities for the estimated impact of GMP indexation changes. The Partnership's actuary has allowed for the impact of full GMP indexation in the calculation of the funding valuation results. The funding valuation results are used as the starting point for the accounting roll-forward calculation. An allowance for full GMP indexation is included in the accounting disclosure;
- GMP equalisation – historical transfers (Further Lloyd's ruling) - the Partnership's actuary has advised that this further ruling is unlikely to have a significant impact on the pension obligations of a typical employer. No allowance has therefore been made for this within the pension obligation calculation;
- Local Government Pension Scheme (LGPS) - McCloud and Sargeant cases. The Partnership's actuary has allowed for the McCloud judgement in the calculation of the latest funding valuation results. The Employer's funding valuation results are used as the starting point for the accounting roll forward calculations and therefore an allowance is included in the accounting disclosure;
- The Goodwin case judgement in respect of deemed discrimination in spousal transfer on death of a member may also result in the potential increasing of the pension liabilities. The actuary has previously carried out some approximate analysis to understand the potential impact of implementing a solution to correct the past underpayment of spouses' benefits. The remedy is still uncertain but the potential impact is estimated to be very small for a typical Fund (c0.1% of obligations). The Partnership's actuary does not believe it is necessary or appropriate to make an adjustment for this;

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 3. CRITICAL JUDGEMENTS IN APPLYING ACCOUNTING POLICIES (*continued*)

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The Walker and O'Brien court cases may impact on future LGPS benefits. The Partnership's actuary understands these are unlikely to be significant judgements in terms of impact on the pension obligations of a typical employer. As a result, and until further guidance is released from the relevant governing bodies in the LGPS, no allowance has been made for the potential remedies for these judgements.

### 4. ASSUMPTIONS MADE ABOUT THE FUTURE AND OTHER MAJOR SOURCES OF ESTIMATION UNCERTAINTY

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The Annual Accounts contains estimated figures that are based on assumptions made by the Partnership about the future or events that are otherwise uncertain. Estimates are made taking into account historical experience, current trends and other relevant factors. However, because balances cannot be determined with certainty, actual results could be materially different from the assumptions and estimates.

The items in the Partnership's Balance Sheet at 31 March 2024 for which there is a significant risk of material adjustment in the forthcoming financial year are:

#### 4.1 Pension Asset/Liabilities

##### *Uncertainties*

Estimation of the net liability to pay pensions depends on a number of complex judgements relating to the discount rate used, the rate at which salaries are projected to increase, changes in retirement ages, mortality rates and expected returns on pension fund assets. A firm of consulting actuaries is engaged to provide the Partnership with expert advice about the assumptions to be applied.

##### *Effect if Actual Result Differs from Assumptions*

Formal actuarial valuations are carried out every three years, where each employer's assets and liabilities are calculated on a detailed basis, using individual member data for cash contribution setting purposes. For LGPS Funds, asset investment returns have been greater than expected compared to last year's accounting date assumption. The net discount rate assumption has increased by more than the increase in the CPI assumption, which has resulted in a gain on the balance sheet position. Using more up-to-date longevity assumption has also led to a small gain on the obligations.

Under accounting guidance, employers are expected to disclose the sensitivity of the valuation to key assumptions. The following table shows the sensitivity of the results to the changes in the assumptions used to measure the scheme liabilities, including approximate percentage changes and monetary values:

	Approximate % increase to Defined Benefit Obligation	Approximate monetary amount (£000)
0.1% decrease in Real Discount Rate	2%	53
1 year increase in member life expectancy	4%	110
0.1% increase in the Salary Increase Rate	0%	2
0.1% increase in the Pension Increase Rate (CPI)	2%	52

### 5. EVENTS AFTER THE BALANCE SHEET DATE

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The Unaudited Annual Accounts were authorised for issue on 14th June 2024. Events taking place after this date are not reflected in the financial statements or notes. Where events taking place before this date provide information about conditions existing at 31st March 2024, the figures in the financial statements and notes have been adjusted in all material respects to reflect the impact of this information.

There were no events which took place after 31st March 2024 which would materially affect the 2023/24 Annual Accounts.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 6. EXPENDITURE AND FUNDING ANALYSIS

The Expenditure and Funding Analysis shows how annual expenditure is used and funded from resources by the Partnership in comparison with those resources consumed or earned by the Partnership in accordance with general accounting practice. It also shows how this expenditure is allocated for decision making purposes between service areas. Income and expenditure accounted for under generally accepted accounting practices is presented more fully in the Comprehensive Income and Expenditure Statement (CIES) (see page 16).

#### Expenditure and Funding Analysis

	Net Expenditure Chargeable to the General Fund	Adjustments	Net Expenditure in the CIES
	£'000	£'000	£'000
<b>2023/24</b>			
Core	734	14	748
Projects	23	(16)	7
<b>Net Cost of Services</b>	<b>757</b>	<b>(2)</b>	<b>755</b>
<b>Other Income and Expenditure</b>			
Government grant	(782)	0	(782)
Constituent council requisitions	(190)	0	(190)
Interest paid/ (received)	(5)	0	(5)
Interest on the effect of the asset ceiling	0	31	31
Net pension interest cost/ (income)	0	(32)	(32)
<b>(Surplus) or deficit on the provision of services</b>	<b>(220)</b>	<b>(3)</b>	<b>(223)</b>
	Net Expenditure Chargeable to the General Fund	Adjustments	Net Expenditure in the CIES
	£'000	£'000	£'000
<b>2022/23</b>			
Core	599	111	710
Projects	325	(116)	209
<b>Net Cost of Services</b>	<b>924</b>	<b>(5)</b>	<b>919</b>
<b>Other Income and Expenditure</b>			
Government grant	(782)	0	(782)
Constituent council requisitions	(190)	0	(190)
Interest Received	2	0	2
Net pension interest cost	0	17	17
<b>(Surplus) or deficit on the provision of services</b>	<b>(46)</b>	<b>12</b>	<b>(34)</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 6. EXPENDITURE AND FUNDING ANALYSIS *(continued)*

#### Expenditure and Funding Analysis *(continued)*

#### 6.1 Adjustments from the General Fund to arrive at the Comprehensive Income and Expenditure Statement amounts:

	Adjusts. For Capital Purposes £'000	Net Change for Pensions Adjusts. £'000	Other Differences £'000	Total Statutory Adjusts. £'000
<b>2023/24</b>				
Core	58	(47)	3	14
Projects	(16)	0	0	(16)
<b>Net Cost of Services</b>	<b>42</b>	<b>(47)</b>	<b>3</b>	<b>(2)</b>
<b>Other Income and Expenditure</b>				
Interest paid/ (received)	0	0	0	0
Interest on the effect of the asset ceiling	0	31	0	31
Net pension interest cost/ (received)	0	(32)	0	(32)
<b>(Surplus) or deficit on the provision of services</b>	<b>42</b>	<b>(48)</b>	<b>3</b>	<b>(3)</b>
	Adjusts. For Capital Purposes £'000	Net Change for Pensions Adjusts. £'000	Other Differences £'000	Total Statutory Adjusts. £'000
<b>2022/23</b>				
Core	58	56	(3)	111
Projects	(116)	0	0	(116)
<b>Net Cost of Services</b>	<b>(58)</b>	<b>56</b>	<b>(3)</b>	<b>(5)</b>
<b>Other Income and Expenditure</b>				
Net pension interest cost	0	17	0	17
<b>(Surplus) or deficit on the provision of services</b>	<b>(58)</b>	<b>73</b>	<b>(3)</b>	<b>12</b>

- Adjustments for capital purposes include the removal of depreciation and impairment costs, and the inclusion of capital funded from current revenue.
- Net changes for pensions adjustment relates to the adjustment made for the removal of IAS19 Employee Benefits pension related expenditure and income with the pension contributions.
- Other differences relate to the reversal of the value of entitlement to accrued leave and interest paid on revenue balances.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 6. EXPENDITURE AND FUNDING ANALYSIS (*continued*)

#### 6.2 Segmental Analysis of Income included in Expenditure and Funding Analysis

	Core	Projects	Total
	£'000	£'000	£'000
<b>2023/24</b>			
<b>Expenditure</b>			
Employee expenses	494	0	494
Other service expenses	240	1,013	1,253
<b>Total Expenditure</b>	<b>734</b>	<b>1,013</b>	<b>1,747</b>
<b>Income</b>			
Government grants and other contributions	0	(990)	(990)
<b>Total Income</b>	<b>0</b>	<b>(990)</b>	<b>(990)</b>
<b>Net Cost of Services</b>	<b>734</b>	<b>23</b>	<b>757</b>
			<b>RESTATED *</b>
	Core	Projects	Total
	£'000	£'000	£'000
<b>2022/23</b>			
<b>Expenditure</b>			
Employee expenses	389	0	389
Other service expenses	211	1,378	1,589
<b>Total Expenditure</b>	<b>600</b>	<b>1,378</b>	<b>1,978</b>
<b>Income</b>			
Government grants and other contributions	(1)	(1,053)	(1,054)
<b>Total Income</b>	<b>(1)</b>	<b>(1,053)</b>	<b>(1,054)</b>
<b>Net Cost of Services</b>	<b>599</b>	<b>325</b>	<b>924</b>

#### 6.3 Expenditure and Income Analysed by Nature

The Partnership's expenditure and income, as set out within the Comprehensive Income and Expenditure Statement is analysed as follows:

	RESTATED *	
	31st March	31st March
	2024	2023
	£'000	£'000
<b>Expenditure</b>		
Employee expenses	450	442
Other service expenses	1,234	1,473
Depreciation, amortisation and impairment	61	58
Interest payments	142	96
<b>Total Expenditure</b>	<b>1,887</b>	<b>2,069</b>
<b>Income</b>		
Fees, charges and other service income	0	0
Interest and investment income	(148)	(77)
Income from constituent councils	(190)	(190)
Government grants and other contributions	(1,772)	(1,836)
<b>Total Income</b>	<b>(2,110)</b>	<b>(2,103)</b>
<b>(Surplus) or Deficit on the Provision of Services</b>	<b>(223)</b>	<b>(34)</b>

\* Projects expenditure/ income has been reduced by £0.094m to remove agency income/ expenditure.



# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 7. ADJUSTMENTS BETWEEN ACCOUNTING BASIS AND FUNDING BASIS UNDER REGULATIONS

This note details the adjustments that are made to the total Comprehensive Income and Expenditure Statement recognised by the Partnership in the year in accordance with proper accounting practice to the resources that are specified by statutory provisions as being available to the Partnership to meet future capital and revenue expenditure.

2023/24	Unusable Reserves				
	General Fund Balance	Capital Adjustment Account	Accumulated Absence Account	Pension Reserve	Movement in Unusable Reserve
	£'000	£'000	£'000	£'000	£'000
<b>Adjustments primarily involving the <u>Capital Adjustment Account</u></b>					
<b>Reversal of items debited or credited to the Comprehensive Income and Expenditure Statement (CIES)</b>					
Charges for depreciation and impairment of non-current assets	61	(61)			(61)
<b>Insertion of items not debited or credited to the Comprehensive Income and Expenditure Statement (CIES)</b>					
Contributions credited to the CIES that have been applied to capital financing	(19)	19			19
<b>Adjustments primarily involving the <u>Pensions Reserve</u></b>					
Reversal of items relating to retirement benefits debited or credited to the CIES	74			(74)	(74)
Employer's pension contributions and direct payments to pensioners payable in the year	(122)			122	122
<b>Adjustments primarily involving the <u>Accumulated Absence Account</u></b>					
Amount by which officer remuneration charged to the CIES on an accruals basis is different from remuneration chargeable in the year in accordance with statutory requirements	3		(3)		(3)
<b>Total Adjustments</b>	<b>(3)</b>	<b>(42)</b>	<b>(3)</b>	<b>48</b>	<b>3</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 7. ADJUSTMENTS BETWEEN ACCOUNTING BASIS AND FUNDING BASIS UNDER REGULATIONS

*(continued)*

This note details the adjustments that are made to the total Comprehensive Income and Expenditure Statement recognised by the Partnership in the year in accordance with proper accounting practice to the resources that are specified by statutory provisions as being available to the Partnership to meet future capital and revenue expenditure.

2022/23	Usable Reserves		Unusable Reserves		
	General Fund Balance	Capital Adjustment Account	Accumulated Absence Account	Pension Reserve	Movement in Unusable Reserve
	£'000	£'000	£'000	£'000	£'000
<b>Adjustments primarily involving the Capital Adjustment Account</b>					
<b>Reversal of items debited or credited to the Comprehensive Income and Expenditure Statement (CIES)</b>					
Charges for depreciation and impairment of non-current assets	58	(58)			(58)
<b>Insertion of items not debited or credited to the Comprehensive Income and Expenditure Statement (CIES)</b>					
Contributions credited to the CIES that have been applied to capital financing	(116)	116			116
<b>Adjustments primarily involving the Pensions Reserve</b>					
Reversal of items relating to retirement benefits debited or credited to the CIES	208			(208)	(208)
Employer's pension contributions and direct payments to pensioners payable in the year	(135)			135	135
<b>Adjustments primarily involving the Accumulated Absence Account</b>					
Amount by which officer remuneration charged to the CIES on an accruals basis is different from remuneration chargeable in the year in accordance with statutory requirements	(3)		3		3
<b>Total Adjustments</b>	<b>12</b>	<b>58</b>	<b>3</b>	<b>(73)</b>	<b>(12)</b>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 8. TRANSFERS TO/FROM EARMARKED RESERVES

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In accordance with the provisions of the Transport Scotland (2019) Act, the Partnership has agreed a Reserves Policy. An earmarked balance will be established to meet slippage on project delivery from 2023/24 to 2024/25.

### 9. FINANCING AND INVESTMENT INCOME

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	2023/24 £'000	2022/23 £'000
Interest income on pension asset/liability	(143)	(77)
Interest Paid/ (Received)	(5)	2
Pensions interest cost	111	94
Interest on the effect of the asset ceiling	31	0
	<hr/>	<hr/>
	(6)	19
	<hr/>	<hr/>

### 10. TAXATION AND NON SPECIFIC GRANT INCOME

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	2023/24 £'000	2022/23 £'000
Government Grant	(782)	(782)
Constituent Council Requisitions	(190)	(190)
	<hr/>	<hr/>
	(972)	(972)
	<hr/>	<hr/>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 11. PROPERTY, PLANT AND EQUIPMENT

#### 11.1 Movements on balances:

##### Movements in 2023/24

Cost or Valuation	Vehicles Plant and Equipment £'000	Assets Under Construction £'000	Total Property Plant and Equipment £'000
At 1st April 2023	795	36	831
Additions	19	0	19
Transfers	25	(25)	0
Revaluation increases/(decreases) recognised in the Surplus/Deficit on the Provision of Services	0	0	0
At 31st March 2024	839	11	850
<b>Accumulated Depreciation</b>			
At 1st April 2023	(600)	0	(600)
Depreciation charge	(61)	0	(61)
Depreciation written out to the Surplus/Deficit on the Provision of Services	0	0	0
At 31st March 2024	(661)	0	(661)
<b>Net Book Value</b>			
At 31st March 2024	178	11	189

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 11. PROPERTY, PLANT AND EQUIPMENT (*continued*)

#### 11.2 Movements on balances:

Comparative Movements in 2022/23	RESTATED * Vehicles Plant and Equipment £'000	Assets Under Construction £'000	Total Property Plant and Equipment £'000
Cost or Valuation			
At 1st April 2022	687	28	715
Additions	94	22	116
Transfers	14	(14)	0
Revaluation increases/(decreases) recognised in the Surplus/Deficit on the Provision of Services	0	0	0
At 31st March 2023	795	36	831
<b>Accumulated Depreciation</b>			
At 1st April 2022	(542)	0	(542)
Depreciation charge	(58)	0	(58)
Depreciation written out to the Surplus/Deficit on the Provision of Services	0	0	0
At 31st March 2023	(600)	0	(600)
<b>Net Book Value</b>			
At 31st March 2023	195	36	231

\* The cost and accumulated depreciation at 1st April 2022 has been reduced by £0.198m to reflect the net book value of assets at 31 March 2016. The asset values at 31 March 2016 were based on net book value after impairment. As all the assets at 31 March 2016 were fully depreciated by 31 March 2021, there is no change to the net book value of the Partnership's Property, Plant and Equipment.

#### 11.3 Depreciation

The following useful lives have been used in the calculation of depreciation:

- Vehicles, plant and equipment: 4 - 5 years

The Partnership provides depreciation on its Property, Plant and Equipment from the month when it comes into use.

#### 11.4 Capital Commitments

As at 31st March 2024, the Partnership had no capital commitments.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 12. FINANCIAL INSTRUMENTS

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#### 12.1 Financial Instruments - Classifications

A financial instrument is a contract that gives rise to a financial asset of one entity and a financial liability or equity instrument of another entity. Non-exchange transactions, such as those relating to government grants, do not give rise to financial instruments.

#### Financial Liabilities

A financial liability is an obligation to transfer economic benefits controlled by the Partnership and can be represented by a contractual obligation to deliver cash or financial assets or an obligation to exchange financial assets and liabilities with another entity that is potentially unfavourable to the Partnership.

#### The Partnership's financial liabilities held during the year comprised:

- Trade payables for goods and services received.

#### Financial Assets

A financial asset is a right to future economic benefits controlled by the Partnership that is represented by cash, equity instruments or a contractual right to receive cash or other financial assets or a right to exchange financial assets and liabilities with another entity that is potentially favourable to the Partnership.

#### The Partnership's financial assets held during the year comprised:

- Cash in hand;
- Cash and cash equivalents (Loans and receivables). The Partnership maintains its funds as part of the City of Edinburgh Council's group of bank accounts. Any cash balance is effectively lent to the Council, but is offset by expenditure undertaken by the City of Edinburgh Council on behalf of the Partnership. Interest is given on month end net indebtedness balances between the Council;
- Trade receivables for goods and services provided.

#### 12.2 Financial Instruments - Balances

The financial liabilities disclosed in the Balance Sheet are analysed across the following categories

	Current	
	31st March 2024 £'000	31st March 2023 £'000
Trade creditors	567	1,167

The financial assets disclosed in the Balance Sheet are analysed across the following categories:

	Current	
	31st March 2024 £'000	31st March 2023 £'000
Loans and receivables	562	1,041
Trade debtors	121	107
	683	1,148

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 12. FINANCIAL INSTRUMENTS *(continued)*

#### 12.3 Financial Instruments - Fair Values

The financial assets represented by loans and receivables are carried in the Balance Sheet at amortised cost. Since all of the Partnership's loans and receivables mature within the next 12 months, the carrying amount has been assumed to approximate to fair value. The fair value of trade and other receivables is taken to be the invoiced or billed amount.

The fair values calculated are as follows:

Financial Liabilities	31 March 2024		31 March 2023	
	Carrying Amount	Fair Value	Carrying Amount	Fair Value
	£'000	£'000	£'000	£'000
Trade creditors	567	567	1,167	1,167

Financial Assets	31 March 2024		31 March 2023	
	Carrying Amount	Fair Value	Carrying Amount	Fair Value
	£'000	£'000	£'000	£'000
Loans and receivables	562	562	1,041	1,041
Trade debtors	121	121	107	107
	<u>683</u>	<u>683</u>	<u>1,148</u>	<u>1,148</u>

#### 12.4 Income, Expenses, Gains and Losses

The gains and losses recognised in the Comprehensive Income and Expenditure Statement in relation to financial instruments are made up as follows:

	31st March 2024	31st March 2023
	£'000	£'000
Total expense and income in Surplus or Deficit on the Provision of Services:		
Interest Expense/ (Income)	(5)	2

### 13. DEBTORS

	31st March 2024	31st March 2023
	£'000	£'000
Debtors:		
Central government bodies	340	603
Other local authorities	201	120
HM Customs and Excise - VAT	62	59
Other entities and individuals	138	363
	<u>741</u>	<u>1,145</u>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 14. PROVISION FOR BAD DEBTS

	31st March 2024 £'000	31st March 2023 £'000
Cost or Valuation		
Opening Balance	0	0
Provision made during year	0	0
Unused amounts reversed during the year	0	0
Closing Balance	0	0

### 15. CASH AND CASH EQUIVALENTS

The balance of cash and cash equivalents is made up of the following elements:

	31st March 2024 £'000	31st March 2023 £'000
Bank account	228	227
	228	227

### 16. CREDITORS

	31st March 2024 £'000	31st March 2023 £'000
Central government bodies	(4)	(2)
Other local authorities	(25)	(531)
Other entities and individuals	(511)	(586)
Employee costs	(15)	(41)
	<b>(555)</b>	<b>(1,160)</b>

### 17. USABLE RESERVES

	31st March 2024 £'000	31st March 2023 £'000
17.1 Unallocated General Fund Reserve	135	49
17.2 Earmarked Balance - Project Budget slippage	293	159
	428	207



# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 18. UNUSABLE RESERVES

	31st March 2024 £'000	31st March 2023 £'000
18.1 Capital Adjustment Account	189	231
18.2 Pension Reserve	0	0
18.3 Accumulated Absence Account	(14)	(11)
	175	220

#### 18.1 Capital Adjustment Account

The Capital Adjustment Account absorbs the timing differences arising from the different arrangements for accounting for the consumption of non-current assets and for financing the acquisition, construction or enhancement of those assets under statutory provisions. The Account is debited with the cost of acquisition, construction or enhancement as depreciation, impairment losses and amortisations are charged to the Comprehensive Income and Expenditure Statement (with reconciling postings from the Revaluation Reserve to convert fair value figures to a historical cost basis). The Account is credited with the amounts set aside by the Partnership as finance for the costs of acquisition, construction and enhancement.

	2023/24 £'000	2022/23 £'000
Balance at 1st April	231	173
Reversal of items related to capital expenditure debited or credited to the Comprehensive Income and Expenditure Statement:		
• Charges for depreciation and impairment of non-current assets	(61)	(58)
• Charges for revaluation of non-current assets	0	0
	170	115
Net written out amount of the cost of non-current assets consumed in year		
Capital financing applied in the year:		
• Contributions credited to the Comprehensive Income and Expenditure Statement that have been applied to capital financing	19	116
	189	231
Balance at 31st March		

#### 18.2 Pension Reserve

The Pension Reserve absorbs the timing differences arising from the different arrangements for accounting for post employment benefits and for funding benefits in accordance with statutory provisions. The Partnership accounts for post employment benefits in the Comprehensive Income and Expenditure Statement as the benefits are earned by employees accruing years of service, updating the liabilities recognised to reflect inflation, changing assumptions and investment returns on any resources set aside to meet the costs. However, statutory arrangements require benefits earned to be financed as the Partnership makes employer's contributions to pension funds or eventually pays any pensions for which it is directly responsible. The debit balance on the Pensions Reserve therefore shows a shortfall in the benefits earned by past and current employees and the resources the Partnership has set aside to meet them. The statutory arrangements will ensure that funding will have been set aside by the time the benefits come to be paid.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 18. UNUSABLE RESERVES *(continued)*

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#### 18.2 Pension Reserve *(continued)*

	2023/24 £'000	2022/23 £'000
Balance at 1st April	0	(580)
Remeasurements of the net defined benefit liability	(48)	653
Reversals of items relating to retirement benefits debited or credited to the Surplus or Deficit on the Provision of Services in the Comprehensive Income and Expenditure Statement.	(74)	(208)
Employer's pension contributions and direct payments to pensioners payable in the year.	122	135
Balance at 31st March	<u>0</u>	<u>0</u>

#### 18.3 Accumulated Absence Account

The Accumulated Absence Account absorbs the differences that would otherwise arise on the General Fund Balance from accruing for compensated absences earned but not taken in the year, for example, annual leave entitlement carried forward at 31st March. Statutory arrangements require that the impact on the General Fund balance is neutralised by transfers to or from the Account.

	2023/24 £'000	2022/23 £'000
Balance at 1st April	(11)	(14)
Settlement or cancellation of accrual made at the end of the preceding year	11	14
Amounts accrued at the end of the current year	(14)	(11)
Balance at 31st March	<u>(14)</u>	<u>(11)</u>

### 19. MEMBERS EXPENSES

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The Partnership paid the following amounts to members during the year:

	2023/24 £'000	2022/23 £'000
Expenses	<u>0</u>	<u>0</u>
	<u>0</u>	<u>0</u>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 20. EXTERNAL AUDIT COSTS

The Partnership has incurred the following costs in relation to the audit of the Annual Accounts by the Partnership's external auditors:

	2023/24	2022/23
	£'000	£'000
Fees payable in respect of:		
• external audit services carried out by the appointed auditor for the year	13	12
	13	12

### 21. GRANT INCOME

The Partnership credited the following grants, contributions and donations to the Comprehensive Income and Expenditure Statement:

	2023/24	2022/23
	£'000	£'000
<b>Credited to Taxation and Non Specific Grant Income</b>		
Scottish Government - Revenue Grant	(782)	(782)
Constituent Council Requisitions (Note 22.3)	(190)	(190)
	(972)	(972)
<b>Credited to Services</b>		
EU Grant - Bling	(11)	(43)
EU Grant - Connect	(13)	(18)
EU Grant - Primaas	1	(29)
EU Grant - Regio Mob	2	(29)
EU Grant - Sharenorth	0	(5)
EU Grant - Surflogh	(8)	(53)
Contribution - City of Edinburgh Council	(2)	(2)
Contribution - East Lothian Council	(2)	(2)
Contribution - Falkirk Council	(7)	(12)
Contribution - Fife Council	(183)	(91)
Contribution - Midlothian Council	(280)	(7)
Contribution - Scotrail	(5)	(11)
Contribution - Scottish Borders Council	(61)	(8)
Contribution - Scottish Enterprise	0	(40)
Contribution - St. Andrews University	(66)	0
Contribution - Stirling Communication Centre	(4)	(4)
Contribution - Scottish Government/ Transport Scotland	(867)	(729)
Contribution - The Media Shop	(1)	0
Contribution - West Lothian Council	(47)	(1)
Contribution - HITRANS	(10)	(4)
Contribution - NESTRANS	(6)	(6)
Contribution - SPT	(11)	(5)
Contribution - SUSTRANS	0	(45)
Contribution - SWESTRANS	(2)	(2)
Contribution - TACTRAN	(31)	(6)
Contribution - ZETRANS	(1)	(1)
	(1,615)	(1,153)

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 22. RELATED PARTIES

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The Partnership is required to disclose material transactions with related parties - bodies or individuals that have the potential to control or influence the Partnership or to be controlled or influenced by the Partnership. Disclosure of these transactions allows readers to assess the extent to which the Partnership might have been constrained in its ability to operate independently or might have secured the ability to limit another party's ability to bargain freely with the Partnership.

#### 22.1 Scottish Government

The Partnership receives grant-in-aid revenue funding through the Scottish Government. Grants received from the Scottish Government are set out in the subjective analysis in Note 21.

#### 22.2 Members

Members of the Partnership have direct control over the Partnership's financial and operating policies. The total of members' expenses paid by the Partnership in 2023-24 is shown in Note 19.

#### 22.3 Other Parties

During the year, the Partnership entered into the following transactions with related parties:

	2023/24 £'000	2022/23 £'000
• Revenue Expenditure - Support Services		
City of Edinburgh Council - Financial and Clerking Services	42	44
Falkirk Council - HR Services	0	0
	<hr/> 42	<hr/> 44
• Revenue Expenditure - Interest on Revenue Balances		
City of Edinburgh Council	0	2
	<hr/> 0	<hr/> 2
• Revenue Expenditure - Other		
City of Edinburgh Council	2	1
East Lothian Council	0	1
Scottish Government	17	18
West Lothian Council	0	2
	<hr/> 19	<hr/> 22

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 22. RELATED PARTIES *(continued)*

#### 22.3 Other Parties *(continued)*

	2023/24 £'000	2022/23 £'000
• Revenue Income - Requisitions		
Clackmannanshire Council	(6)	(6)
East Lothian Council	(13)	(13)
City of Edinburgh Council	(62)	(62)
Falkirk Council	(19)	(19)
Fife Council	(44)	(44)
Midlothian Council	(11)	(11)
Scottish Borders Council	(13)	(13)
West Lothian Council	(22)	(22)
	<u>(190)</u>	<u>(190)</u>
• Revenue Income - Interest on Revenue Balances		
City of Edinburgh Council	(5)	0
	<u>(5)</u>	<u>0</u>
• Revenue Income - Other		
City of Edinburgh Council	(2)	(2)
East Lothian Council	(2)	(2)
Falkirk Council	(7)	(12)
Fife Council	(3)	(3)
Midlothian Council	(5)	(7)
Scottish Borders Council	(2)	(2)
Scottish Enterprise	0	(40)
Scottish Government/ Transport Scotland	(867)	(729)
West Lothian Council	(1)	(1)
	<u>(889)</u>	<u>(798)</u>
• Revenue Income - Agency Income		
Fife Council	(180)	(88)
Midlothian Council	(275)	0
Scottish Borders Council	(59)	(6)
West Lothian Council	(46)	0
	<u>(560)</u>	<u>(94)</u>

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 22. RELATED PARTIES *(continued)*

#### 22.3 Other Parties *(continued)*

The following represents amounts due to/(from) the Partnership at 31 March 2024, with its related parties.

<b>CREDITORS</b>	<b>2023/24</b>	<b>Restated*</b>
	<b>£'000</b>	<b>2022/23</b>
		<b>£'000</b>
• Creditors - Related Parties (Revenue Grants)	0	0
• Creditors - Related Parties (Other)		
City of Edinburgh Council	(25)	(526) *
Falkirk Council	0	0
Fife Council	0	(5)
Scottish Government	(4)	(2)
	(29)	(533)
• Creditors - Other Parties	(550)	(1,167)
Total Creditors	(579)	(1,700)
<b>DEBTORS</b>		
• Debtors - Related Parties (Revenue Grants/ Other)		
East Lothian Council	2	0
Falkirk Council	4	7
Fife Council	137	100
Midlothian Council	0	4
Scottish Borders Council	2	9
Scottish Government/ Transport Scotland	335	603
West Lothian Council	56	0
	536	723
• Debtors - Other Parties	205	422
Total Debtors	741	1,145

\* Creditors 2022/23 - Related Parties (Other) is restated to include the indebtedness between the Partnership and City of Edinburgh Council.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 23. LEASES

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#### Operating Leases

On 15th December 2013, the Partnership entered an Agreement with Brompton Bike Hire Limited for the provision of two eight-bay Brompton Hire bicycle docks and sixteen hire bicycles over a period of five years at a total cost of £113,564. The full value of £113,564 was paid in 2023/24.

From 8th February 2016 the Partnership took occupancy of Area 3D (Bridge) in Victoria Quay, Edinburgh under the terms of a Memorandum of Terms of Occupation (MOTO) with the Scottish Government, which forms part of the Civil Estates Occupancy Agreement (CEOA).

The Partnership signed a new MOTO and is permitted to occupy the space from 8th February 2019 to 7th February 2022 (the Prescribed Term) and so on until ended by either party giving notice under the terms of the CEOA. Both parties will, upon provision of not less than 1 year's prior written notice, have the ability to break this agreement.

The Partnership's contract with O2 to lease ten Apple iPhones for staff use expired in February 2024 under no penalty.

The Partnership currently has a contract with Ricoh UK Ltd to lease an office printer. The minimum term for this contract is 36 months before the Partnership has the option to terminate the lease under no penalty. This contract expires in September 2025.

The Partnership's expenditure on lease payments during 2023/24 was £30,000 (2022/23 £23,000).

The minimum lease payments due under non-cancellable leases in future years are:

	2023/24 £'000	2022/23 £'000
• Not later than 1 year	18	23
• Over 1 year	0	1
	<hr/> 18	<hr/> 24

The Partnership has no other material operational leases.

### 24. DEFINED BENEFIT PENSION SCHEMES

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#### 24.1 Participation in Pension Schemes

As part of the terms and conditions of employment of its staff, the Partnership makes contributions towards the cost of post employment benefits. Although these benefits will not actually be payable until the employees retire, the Partnership has a commitment to make the payments that require to be disclosed at the time that employees earn their future entitlement. As explained in Accounting Policy 1.8, the Partnership is an admitted body to the Local Government Pension Scheme (LGPS) which is administered by the Lothian Pension Fund.

The Partnership participates in:

- A funded defined benefit final salary scheme. This means that the Partnership and employees pay contributions into a fund, calculated at a level intended to balance the pensions liabilities with investment assets.
- An arrangement for the award of discretionary post retirement benefits upon early retirement - this is an unfunded defined benefit arrangement, under which liabilities are recognised when awards are made. However, there are no investment assets built up to meet these pension liabilities, and cash has to be generated to meet actual pensions payments as they eventually fall due.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 24. DEFINED BENEFIT PENSION SCHEMES *(continued)*

#### 24.2 Transactions Relating to Post-employment Benefits

The Partnership recognises the cost of retirement benefits in the reported cost of services when they are earned by employees, rather than when the benefits are eventually paid as pensions. However, the charge that is required to be made is based on the cash payable in the year, so the real cost of post employment/retirement benefits is reversed out of the General Fund via the Movement in Reserves Statement. The following transactions have been made in the Comprehensive Income and Expenditure Statement and the General Fund Balance via the Movement in Reserves Statement during the year:

	2023/24 £000	2023/24 £000	2022/23 £000	2022/23 £000
<b>Comprehensive Income and Expenditure Statement</b>				
<i>Cost of services:</i>				
Service cost, comprising:				
Current service costs	75		191	
Past service costs	<u>0</u>	75	<u>0</u>	191
<i>Financing and investment income:</i>				
Net interest expense/ (income)	(32)		17	
Interest on the effect of the asset ceiling	<u>31</u>	(1)	<u>0</u>	17
<b>Total post employee benefit charged to the surplus on the provision of services</b>		<u>74</u>		<u>208</u>
<i>Other post-employment benefits charges to the Comprehensive Income / Expenditure Statement</i>				
Remeasurement of the net defined liability, comprising:				
Return on pension assets, excluding the amount included in the net interest expense above	(41)		14	
Actuarial gains and (losses) arising on changes in financial assumptions	(164)		(1,519)	
Actuarial gains and (losses) arising on changes in demographic assumptions	(48)		(23)	
Restriction in Pension Asset	(68)		647	
Other experience	<u>369</u>		<u>228</u>	
		<u>48</u>		<u>(653)</u>
<b>Total post-employment benefits charged to the Comprehensive Income / Expenditure Statement</b>		<u>122</u>		<u>(445)</u>
<b>Movement in Reserves Statement</b>				
Reversal of net charges made to the surplus on the provision of services for post-employment benefits in accordance with the Code.		<u>(48)</u>		<u>73</u>
<b>Actual amount charged against the General Fund Balance for pensions in the year:</b>				
Employer's contributions payable to the scheme		<u>122</u>		<u>135</u>
		<u>122</u>		<u>135</u>



# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 24. DEFINED BENEFIT PENSION SCHEMES *(continued)*

#### 24.3 Pension Assets and Liabilities Recognised in the Balance Sheet

The amount included in the Balance Sheet arising from the Council's obligations in respect of its defined benefit plan is as follows:

	2023/24 £'000	2022/23 £'000
Fair value of employer assets	3,363	2,976
* Restriction in Pension Asset	(610)	(647)
Present value of funded liabilities	(2,753)	(2,329)
	<hr/>	<hr/>
Net asset/(liability) arising from defined benefit obligation	0	0

#### 24.4 Reconciliation of the Movements in the Fair Value of Scheme Assets

	2023/24 £'000	2022/23 £'000
Opening fair value of scheme assets	2,976	2,821
Interest income	143	77
Remeasurement gain / (loss):		
Other Experience	143	
Return on plan assets, excluding the amount included in the net interest expense	41	(14)
Contributions from employer	122	135
Contributions from employees into the scheme	27	30
Benefits paid	(89)	(73)
Unfunded benefits paid	0	0
	<hr/>	<hr/>
Closing fair value of scheme assets	3,363	2,976

#### Reconciliation of Present Value of the Scheme Liabilities

	2023/24 £'000	2022/23 £'000
Present value of funded liabilities	(2,329)	(3,401)
Present value of unfunded liabilities	0	0
	<hr/>	<hr/>
Opening balance at 1st April	(2,329)	(3,401)
Current service cost	(75)	(191)
Interest cost	(111)	(94)
Contributions from employees into the scheme	(27)	(30)
Remeasurement gain / (loss):		
Change in demographic assumptions	48	23
Change in financial assumptions	164	1,519
Other experience	(512)	(228)
Past service cost	0	0
Benefits paid	89	73
Unfunded benefits paid	0	0
	<hr/>	<hr/>
Closing balance at 31st March	(2,753)	(2,329)

\* International Accounting Standard 19 imposes a limit on the maximum amount of surplus which can be recognised on the balance sheet. This adjustment reduced the value of the Pension Asset to the restricted amount for 2022/23 and 2023/24.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 24. DEFINED BENEFIT PENSION SCHEMES *(continued)*

#### 24.5 Fair Value of Employer Assets

The following asset values are at bid value as required under IAS19.

	2023/24		2022/23	
	£'000	%	£'000	%
Equity Securities:				
Consumer *	397	12	365	12
Manufacturing *	462	14	410	14
Energy and Utilities *	183	5	180	6
Financial Institutions *	198	6	179	6
Health and Care *	217	6	219	7
Information technology *	167	5	124	4
Other *	206	6	203	7
Sub-total Equity Securities	1,830		1,679	
Debt Securities:				
Corporate Bonds (investment grade) *	54	2	46	2
UK Government *	452	13	345	12
Other *	58	2	62	2
Sub-total Debt Securities	565		454	
Private Equity:				
All *	17	1	2	
All	14	0	10	0
Sub-total Private Equity	31		12	
Real Estate:				
UK Property *	0	0	20	1
UK Property	172	5	114	4
Overseas Property *	11	0	4	0
Overseas Property	0	0	1	0
Sub-total Real Estate	183		139	
Investment Funds and Unit Trusts:				
Equities *	0	0	40	1
Equities	0	0	2	0
Bonds	86	3	86	3
Commodities	37	1	0	0
Infrastructure *	8	0	0	0
Infrastructure	499	15	424	14
Sub-total Investment Funds and Unit Trusts	630		552	
Derivatives:				
Foreign Exchange *	(1)	(0)	0	0
Sub-total Derivatives	(1)		0	
Cash and Cash Equivalents				
All *	125	4	141	5
Sub-total Cash and Cash Equivalents	125		141	
Total Fair Value of Employer Assets	3,363		2,976	

*Scheme assets marked with an asterisk (\*) have quoted prices in active markets.*

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 24. DEFINED BENEFIT PENSION SCHEMES *(continued)*

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#### 24.6 Basis for Estimating Assets and Liabilities

Hymans Robertson, the independent actuaries to Lothian Pension Fund, have advised that the financial assumptions used to calculate the components of the pension expense for the year ended 31 March 2024 were those from the beginning of the year (i.e. 31 March 2023) and have not been changed during the year.

The principal assumptions used by the actuary in the calculations are:

##### Investment returns

- Total returns for the period from 1 April 2023 to 31 March 2024 6.1%

	<b>2023/24</b>	<b>2022/23</b>
Mortality assumptions - longevity at 65 for current pensioners:		
• Males	22.0 years	19.9 years
• Females	22.9 years	22.9 years
Mortality assumptions - longevity at 65 for future pensioners:		
• Males	22.2 years	21.2 years
• Females	25.7 years	24.7 years
Pension increase rate	2.75%	2.95%
Salary increase rate (see below)	3.45%	3.45%
Discount rate	4.85%	4.75%

Estimation of defined benefit obligations is sensitive to the actuarial assumptions set out above. In order to quantify the impact of a change in the financial assumptions used, the Actuary has calculated and compared the value of the scheme liabilities as at 31 March 2024 on varying bases. The approach taken by the Actuary is consistent with that adopted to derive the IAS19 figures.

The principal demographic assumption is the longevity assumption (i.e. member life expectancy). For sensitivity purposes, the Fund's Actuary has estimated that a one year increase in life expectancy would approximately increase the Employer's Defined Benefit Obligation by around 3-5%. In practice the actual cost of a one year increase in life expectancy will depend on the structure of the revised assumption (i.e. if improvements to survival rates predominantly apply at younger or older ages).

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 24. DEFINED BENEFIT PENSION SCHEMES *(continued)*

#### 24.7 Analysis of projected amount to be charged to profit or loss for the period to 31 March 2025

	Assets £000	Obligations £000	Net (liability) / asset £000	% of pay
Projected current service cost	0	(84)	(84)	(21.9%)
Past service cost including curtailments	0	0	0	0.0%
Effect of settlements	0	0	0	0.0%
Total Service Cost	0	(84)	(84)	(21.9%)
Interest income on plan assets	164	0	164	42.8%
Interest cost on defined benefit obligation	0	(134)	(134)	(35.0%)
Total Net Interest Cost	164	(134)	30	7.8%
Total included in Profit or Loss	164	(218)	(54)	(14.1%)

The Partnership's estimated contribution to Lothian Pension Fund for 2024/25 is £103,000.

### 25. NATURE AND EXTENT OF RISKS ARISING FROM FINANCIAL INSTRUMENTS

The Partnership's activities expose it to a variety of financial risks:

- Credit risk - the possibility that other parties might fail to pay amounts due to the Partnership;
- Liquidity risk - the possibility that the Partnership might not have funds available to meet its commitments to make payments;
- Re-financing risk - the possibility that the Partnership might be requiring to renew a financial instrument on maturity at disadvantageous interest rates or terms;
- Market risk - the possibility that financial loss might arise for the Partnership as a result of changes in such measures as interest rate movements;
- Price risk - the possibility that fluctuations in equity prices has a significant impact on the value of financial instruments held by the Partnership;
- Foreign exchange risk - the possibility that fluctuations in exchange rates could result in loss to the Partnership.

Treasury Management is carried out on the Partnership's behalf by the City of Edinburgh Council. The Council's overall risk management procedures focus on the unpredictability of financial markets and implementing restrictions to minimise these risks. The Council complies with the CIPFA Prudential Code and has adopted the CIPFA Treasury Management in the Public Services Code of Practice.

#### **Credit risk**

Credit risk arises from deposits with banks and financial institutions, as well as credit exposures to the Partnership's customers.

The Partnership's surplus funds not immediately required to meet expenditure commitments are held with the City of Edinburgh Council, and the Partnership receives interest on revenue balances on these monies. As the Partnership's surplus funds are held with the City of Edinburgh Council, the counterparty default exposure is effectively nil.

All Partnership invoices become due for payment on issue, and all trade debtors are overdue less than a month.

Collateral - During the reporting period the Partnership held no collateral as security.

# The South East of Scotland Transport Partnership (SESTRAN)

## NOTES TO THE ANNUAL ACCOUNTS

### 25. NATURE AND EXTENT OF RISKS ARISING FROM FINANCIAL INSTRUMENTS *(continued)*

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#### **Liquidity risk**

The Partnership is required by statute to provide a balanced budget, which ensures sufficient monies are raised to cover annual expenditure. There is therefore no significant risk that it will be unable to raise finance to meet its commitments under financial instruments. The arrangement with the City of Edinburgh Council ensures sufficient liquidity is available for the Partnership's day to day cash flow needs.

The Council manages the Partnership's liquidity position through the risk management procedures above as well as through cash flow management procedures required by the Code of Practice.

#### **Refinancing risk**

The Partnership has only a small level of surplus funds and no long term debt. The refinancing risk to the Partnership relates to managing the exposure to replacing financial instruments as they mature.

As such, the Partnership has no refinancing risk on its liabilities.

The Partnership has no investments with a maturity greater than one year.

#### **Market risk**

Interest rate risk

The Partnership is exposed to interest rate movements on its investments. Movements in interest rates have a complex impact on an organisation, depending on how variable and fixed interest rates move across differing financial instrument periods.

For instance, a rise in variable and fixed interest rates would have the following effects:

- borrowings at variable rates - the interest expense charged to the Surplus or Deficit on the Provision of Services will rise;
- borrowings at fixed rates - the fair value of the liabilities borrowings will fall;
- investments at variable rates - the interest income credited to the Surplus or Deficit on the Provision of Services will rise; and
- investments at fixed rates - the fair value of the assets will fall.

The Partnership currently has no borrowings. Changes in interest receivable on variable rate investments will be posted to the Surplus or Deficit on the Provision of Services and affect the General Fund Balance.

However, all investments currently have a maturity of less than one year and the fair value has therefore been approximated by the outstanding principal.

The Partnership's surplus funds are held with the City of Edinburgh Council.

The Council's Treasury Management Team continue to monitor market and forecast interest rates during the year and adjust investment policies accordingly.

#### **Price risk**

The Partnership does not invest in equity shares.

#### **Foreign Exchange risk**

As at 31 March 2024, the Partnership had no financial assets subject to foreign exchange risk.

The Partnership has no financial liabilities denominated in foreign currencies.

### 26. AGENCY ARRANGEMENTS

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Through a Partnership procurement framework contract, the Partnership makes payment for the supply of Bus Passenger Transport Information system ICT equipment and recovers cost from other bodies. The Partnership has assessed the nature of these transactions to determine if it is acting as a Principal or Agent. Under the Code an Agent is acting as an intermediary, whereas a Principal is acting on its own behalf. In 2023/24, the Partnership entered into agency arrangements with Fife Council, Midlothian Council, Scottish Borders Council, West Lothian Council and St Andrew's University to provide equipment. The total income received and expenditure incurred of £0.627m is not included in the Comprehensive Income and Expenditure Statement. In 2022/23, equipment to the value of £0.094m was supplied and corresponding cost recovered.

# The South East of Scotland Transport Partnership (SESTRAN)

## INDEPENDENT AUDITOR'S REPORT

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### Independent auditor's report to the members of South East of Scotland Transport Partnership and the Accounts Commission

#### Report on the audit of the financial statements

##### Opinion on financial statements

I certify that I have audited the financial statements in the annual accounts of the South East of Scotland Transport Partnership for the year ended 31 March 2024 under Part VII of the Local Government (Scotland) Act 1973. The financial statements comprise the Movement in Reserves Statement, Comprehensive Income and Expenditure Statement, Balance Sheet, Cash Flow Statement and notes to the financial statements, including material accounting policy information. The financial reporting framework that has been applied in their preparation is applicable law and UK adopted international accounting standards, as interpreted and adapted by the Code of Practice on Local Authority Accounting in the United Kingdom 2023/24 (the 2023/24 Code).

In my opinion the accompanying financial statements:

- give a true and fair view of the state of affairs of the body as at 31 March 2024 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with UK adopted international accounting standards, as interpreted and adapted by the 2023/24 Code; and
- have been prepared in accordance with the requirements of the Local Government (Scotland) Act 1973, The Local Authority Accounts (Scotland) Regulations 2014, and the Local Government in Scotland Act 2003.

##### Basis of opinion

I conducted my audit in accordance with applicable law and International Standards on Auditing (UK) (ISAs (UK)), as required by the Code of Audit Practice approved by the Accounts Commission for Scotland. My responsibilities under those standards are further described in the auditor's responsibilities for the audit of the financial statements section of my report. I was appointed by the Accounts Commission on 03 April 2023. My period of appointment is five years, covering 2022/23 to 2026/27. I am independent of the body in accordance with the ethical requirements that are relevant to my audit of the financial statements in the UK including the Financial Reporting Council's Ethical Standard, and I have fulfilled my other ethical responsibilities in accordance with these requirements. Non-audit services prohibited by the Ethical Standard were not provided to the body. I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my opinion.

##### Conclusions relating to going concern basis of accounting

I have concluded that the use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work I have performed, I have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the body's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from when the financial statements are authorised for issue.

These conclusions are not intended to, nor do they, provide assurance on the body's current or future financial sustainability. However, I report on the body's arrangements for financial sustainability in a separate Annual Audit Report available from the Audit Scotland website.

##### Risks of material misstatement

I report in my Annual Audit Report the most significant assessed risks of material misstatement that I identified and my judgements thereon.

##### Responsibilities of the Treasurer and Partnership Board for the financial statements

As explained more fully in the Statement of Responsibilities, the Treasurer is responsible for the preparation of financial statements that give a true and fair view in accordance with the financial reporting framework, and for such internal control as the Treasurer determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

# The South East of Scotland Transport Partnership (SESTRAN)

## INDEPENDENT AUDITOR'S REPORT (Contd.)

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### Responsibilities of the Treasurer and Partnership for the financial statements (Contd.)

In preparing the financial statements, the Treasurer is responsible for assessing the body's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless there is an intention to discontinue the body's operations.

The South East of Scotland Transport Partnership is responsible for overseeing the financial reporting process.

### Auditor's responsibilities for the audit of the financial statements

My objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes my opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. I design procedures in line with my responsibilities outlined above to detect material misstatements in respect of irregularities, including fraud. Procedures include:

- using my understanding of the local government sector to identify that the Local Government (Scotland) Act 1973, The Local Authority Accounts (Scotland) Regulations 2014, and the Local Government in Scotland Act 2003 are significant in the context of the body;
- inquiring of the Treasurer as to other laws or regulations that may be expected to have a fundamental effect on the operations of the body;
- inquiring of the Treasurer concerning the body's policies and procedures regarding compliance with the applicable legal and regulatory framework;
- discussions among my audit team on the susceptibility of the financial statements to material misstatement, including how fraud might occur; and
- considering whether the audit team collectively has the appropriate competence and capabilities to identify or recognise non-compliance with laws and regulations.

The extent to which my procedures are capable of detecting irregularities, including fraud, is affected by the inherent difficulty in detecting irregularities, the effectiveness of the body's controls, and the nature, timing and extent of the audit procedures performed.

Irregularities that result from fraud are inherently more difficult to detect than irregularities that result from error as fraud may involve collusion, intentional omissions, misrepresentations, or the override of internal control. The capability of the audit to detect fraud and other irregularities depends on factors such as the skilfulness of the perpetrator, the frequency and extent of manipulation, the degree of collusion involved, the relative size of individual amounts manipulated, and the seniority of those individuals involved.

A further description of the auditor's responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of my auditor's report.

### Reporting on other requirements

#### Opinion prescribed by the Accounts Commission on the audited part of the Remuneration Report

I have audited the parts of the Remuneration Report described as audited. In my opinion, the audited parts of the Remuneration Report have been properly prepared in accordance with The Local Authority Accounts (Scotland) Regulations 2014.

### Other information

The Treasurer is responsible for the other information in the annual accounts. The other information comprises the Management Commentary, Annual Governance Statement, Statement of Responsibilities and the unaudited part of the Remuneration Report.

# The South East of Scotland Transport Partnership (SESTRAN)

## INDEPENDENT AUDITOR'S REPORT (Contd.)

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### Other information (Contd.)

My responsibility is to read all the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or my knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If I identify such material inconsistencies or apparent material misstatements, I am required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work I have performed, I conclude that there is a material misstatement of this other information, I am required to report that fact. I have nothing to report in this regard.

My opinion on the financial statements does not cover the other information and I do not express any form of assurance conclusion thereon except on the Management Commentary and Annual Governance Statement to the extent explicitly stated in the following opinions prescribed by the Accounts Commission.

### Opinions prescribed by the Accounts Commission on Management Commentary and Annual Governance Statement

In my opinion, based on the work undertaken in the course of the audit:

- the information given in the Management Commentary for the financial year for which the financial statements are prepared is consistent with the financial statements and that report has been prepared in accordance with statutory guidance issued under the Local Government in Scotland Act 2003; and
- the information given in the Annual Governance Statement for the financial year for which the financial statements are prepared is consistent with the financial statements and that report has been prepared in accordance with the Delivering Good Governance in Local Government: Framework (2016).

### Matters on which I am required to report by exception

I am required by the Accounts Commission to report to you if, in my opinion:

- adequate accounting records have not been kept; or
- the financial statements and the audited part of the Remuneration Report are not in agreement with the accounting records; or
- I have not received all the information and explanations I require for my audit.

I have nothing to report in respect of these matters.

### Conclusions on wider scope responsibilities

In addition to my responsibilities for the annual accounts, my conclusions on the wider scope responsibilities specified in the Code of Audit Practice, including those in respect of Best Value, are set out in my Annual Audit Report.

### Use of my report

This report is made solely to the parties to whom it is addressed in accordance with Part VII of the Local Government (Scotland) Act 1973 and for no other purpose. In accordance with paragraph 108 of the Code of Audit Practice, I do not undertake to have responsibilities to members or officers, in their individual capacities, or to third parties.

### Christopher Gardner

Audit Scotland  
4th Floor, South Suite, The Athenaeum Building  
8 Nelson Mandela Place  
Glasgow  
G1 2BT

**Date:** \_\_\_\_\_



## **PEOPLE AND PLACE**

### **1 INTRODUCTION**

- 1.1 The purpose of this report is to present to the Partnership Board an outline of the People and Place Delivery Plan, including work carried out to date, future plans, and the management of grant funds in 2025/26. Approval is also sought for grant eligibility criteria and the assessment process for the related grant funds.

### **2 BACKGROUND**

- 2.1 In December 2023, Transport Scotland (TS) communicated a new approach to active travel behaviour change and access to bikes funding ('People and Place') to RTPs. This new approach centred on a move away from the 6 Active Travel Delivery Partners (ATDPs – Cycling UK, Cycling Scotland, Living Streets, Paths for All, Scottish Cycling and Sustrans) receiving and distributing the funds at a national level, to the devolution of the funds to RTPs, who were then asked to work with their partner Local Authorities to develop a plan for their region.
- 2.2 Following work carried out at pace in early 2024, the Partnership Board noted SEStran's 24/25 People and Place Plan and approved the eligibility criteria and assessment process for an external grant fund to support delivery of this plan. Over the course of 24/25 to date, the full £5.326million available to SEStran has been committed and the plan has been implemented through close working with Local Authorities and external delivery partners. Updates on progress have formed part of the quarterly Projects and Strategy Performance Report to the Performance and Audit Committee and the Board.
- 2.3 As part of the 24/25 plan, funding and SEStran resource was allocated to the development of a Delivery Plan that would set out how People and Place funding would be invested in future years. To support in this work, Jacobs was commissioned through a competitive tender process to undertake consultation and draft the Delivery Plan with SEStran officers.
- 2.4 Throughout 24/25, discussions have been ongoing with TS to ensure that the emerging Delivery Plan aligns with its future vision for People and Place. The key elements of the fund remain unchanged, and will be focused on for active travel behaviour change measures (not including infrastructure) that falls into four themes:
- Schools and Young People
  - Workplaces
  - Accessibility and Inclusion
  - Capacity and Capability
- The main difference in 25/26 is the incorporation of sustainable transport alongside active travel. TS has set out that this covers measures such as

- Shared-transport projects, including car clubs, car share, etc.
- (Digital) Demand Responsive Transport
- Real Time Passenger Information
- Support for MaaS projects
- Engagement initiatives to promote sustainable transport

2.5 It should be noted that at the time of writing this report, no budget figure has been confirmed for People and Place in 25/26 – this is expected imminently following the Scottish Budget. An assumption has therefore been made in the drafting of the plan that the funding available to SEStran remains at the same level as in 24/25. Discussions have also been held amongst RTPs on how the TS funding will be allocated, and a consensus has been reached that a similar funding formula should be used as for 24/25, which will be confirmed once an overall budget figure has been provided.

### **3 THE PEOPLE AND PLACE DELIVERY PLAN**

3.1 The Delivery Plan that has been developed is attached at Appendix 1. The following section provides a summary of the plan, the funding breakdown, and the consultation and engagement process.

#### **3.2 Plan Principles**

3.2.1 The key principle sitting behind the Delivery Plan is the need to prioritise funding into specific areas in order to achieve impact on travel behaviours. Fundamentally, the available funding is not sufficient to achieve behaviour change across the whole region, and so this targeted approach has been identified as the best way to achieve change with the limited funding available.

3.2.2 In addition to this, one of the key elements of feedback we've had over the last 12 months has been the difficulty in delivering behaviour change projects and retaining capacity with single year funding. Whilst this is not something SEStran can offer, one of the key drivers for developing a plan that identifies interventions for a number of future years is to be able to provide some degree of funding certainty for people and projects. As part of this, we are investigating the potential to offer grant agreements that have extension clauses built in that can be activated subject to performance and funding availability.

3.2.3 Despite initially presenting the outcome of this work as a 5-year Delivery Plan, as work has progressed it has become clear that planning that far in advance has multiple challenges, and there is a need to retain flexibility. The Delivery Plan therefore has no set timeframe and instead will be a living document that is reviewed annually.

### **3.3 Funding Pots and Prioritisation**

3.3.1 The plan is split into five funding pots, fuller descriptions of which are given at section 3.2 of the Delivery Plan:

- Regional Priority Intervention Fund
- Local Authority Delivery Support
- Community Grants Fund
- Access to Cycles and Cycle Storage Fund
- Regional projects and programme management

Out of these funding pools, only the Regional Priority Intervention Fund will be subject to the prioritisation noted above – this is set out in more detail in section 4.

3.3.2 With no total budget available, the amount of funding available to each pool has not been confirmed, but estimated proportions based on current year funding are shown in the Delivery Plan.

3.3.3 The main element of the Delivery Plan, the Regional Priority Intervention Fund, has been prioritised based on a review of the available data, reference to national, regional and local strategies, and the engagement noted below. This has identified 6 main intervention types which are set out in section 4.1 of the Delivery Plan. These intervention types have then been applied at a Local Authority level to identify priority intervention locations/projects within each Local Authority in section 4.2.

### **3.4 Consultation and Engagement**

3.4.1 There has been significant engagement undertaken as part of the development of the Delivery Plan. This begun over the summer with Jacobs holding one-to-one meetings with each Local Authority and current delivery partner. The main purpose of these meetings was to update information on current plans and aspirations following similar engagement in early 2024. Key points from those sessions included:

- Attendees recognised and welcomed opportunities to work regionally, welcomed SEStran's role in enabling this, including facilitating relationship building, enabling cross-boundary strategic approach, and exploring regional procurement models
- First quarter of 2024/25 has been challenging. Value SEStran's approach to PPP to date (approachable, open lines of communication, willingness to be flexible)
- Plan needs to help coordinate active travel behaviour change delivery locally and regionally
- Organisations have a wealth of delivery knowledge and expertise. Real appetite to engage and share learning. Offers to provide training, share latest research, communicate delivery project lessons learned and explore how organisations could support RTPs and LAs in delivering their priorities
- Challenges from external delivery partners working across different RTP areas where processes differ. SEStran was commended on its approach compared to other RTPs (eg SEStran was the first RTP to issue grant offer letters)

- 3.4.2 This engagement continued with our People and Place knowledge sharing day on 29<sup>th</sup> August. This included a session to set out initial ideas and hear feedback from Local Authorities on:
- Purpose of the 5-year plan
  - Suggested contents list
  - Partners' roles/responsibilities for programme planning and delivery
  - Project prioritisation
- 3.4.3 Following this, the first draft of the Delivery Plan was shared with all Local Authorities, current and potential delivery partners, other key stakeholders, and TS for a 3-week consultation in September. Responses were received from each Local Authority as well as 15 other organisations (including Transport Scotland). In general, feedback received was supportive of the prioritisation approach and the potential for change and additional funding certainty that this will provide. Changes have been made to the Plan where it was felt this was appropriate.
- 3.4.4 During this consultation, concerns were raised by 3 Local Authorities around the central approach of prioritising funding in certain areas, and this being set by a regional plan rather than at a Local Authority level. Subsequent to the consultation, meetings were held with each of these Authorities to better understand their concerns and set out in more detail the justification for the approach and the other funding sources available which will have no prioritisation (specifically the Direct Award from Transport Scotland and SEStran's Local Authority delivery support and the access to cycles and cycle storage funding). Whilst this resolved most concerns, some do remain about prioritising funding as opposed to distributing it more evenly. However, as this is a central element of the plan (it clearly responds to the desire from TS to see a more regionally cohesive and effective programme, is a more effective route to achieving changes in transport behaviours in line with the Regional Transport Strategy, and was welcomed by most consultation respondents) a decision was taken to retain this approach.

## **4 PEOPLE AND PLACE 25/26 GRANT PROGRAMMES**

- 4.1 Implementation of the Delivery Plan will require the setting up of 3 grant funding routes in 25/26, which encompass the following funding pots:
- A grant funding route for Local Authorities to deliver projects under the Regional Priority Intervention Fund, the Local Authority Delivery Support Funding, and the Access to Cycles and Cycle Storage Fund
  - A grant funding route for third party organisations to deliver projects under the Regional Priority Intervention Fund and the Access to Cycles and Cycle Storage Fund
  - A community grant fund, which aligns fully with this funding pot

4.2 As noted above, current funding for the 25/26 People and Place Programme is not known and therefore figures for the value for each grant fund cannot be given. Delegated authority is therefore sought for the Partnership Director to set these fund values in line with this report, the Delivery Plan, and the grant funding offered by TS. These figures will be reported to the next meeting of the Board and no formal grant offers will be made until the Board has approved the 25/26 Partnership Budget and a People and Place grant offer letter has been received from TS, reviewed and signed by the Partnership Director.

### **4.3 Grants to Local Authorities**

4.3.1 It is anticipated that approximately 45% of the total funds provided to SEStran will be passed onto Local Authorities, which is in line with the figure for 24/25 (this figure may vary as a result of changes to the total funding available and as Local Authorities decide on projects they may wish to carry out internally, or ask third parties organisations to deliver). As it is anticipated that all grants to Local Authorities will be less than £1million, under section 6 of the Grant Standing Orders:

- The overarching eligibility criteria and the overarching assessment criteria for such grant funds shall be approved by the Partnership Director having been developed in partnership with Local Authorities
- Grant awards shall be delegated to the Partnership Director for approval (within the agreed annual budget), and reported to the Board for noting at its next meeting

4.3.2 In offering grants to Local Authorities under the Regional Priority Intervention Fund and the Access to Cycles and Cycle Storage Fund, SEStran will seek to work collaboratively with them to support project selection in line with the Delivery Plan. Where funding demand exceeds the available budget, the same prioritisation criteria will be used as were developed for the 24/25 programme:

- Measurable impact
- Deliverability within the financial year
- Location (both ensuring a geographic spread and tie ins with existing infrastructure)
- Fit within the programme budgets

4.3.3 Alongside this funding for specific project delivery, Local Authorities will be provided with direct delivery funding by SEStran (the Local Authority Delivery Support Funding) that they will be able to spend on local priorities. It is estimated that this will be in the region of 10-15% of the total budget. This funding will be allocated on a pro rata basis, with a minimum award value set to ensure a smaller Authorities receive enough to support delivery. This is in line with the mechanism used by TS for distribution of the Local Authority Direct Award in 24/25.

## **4.4 Grants to Third Party Organisations**

- 4.4.1 Alongside grants to Local Authorities, grants will be made to third party organisations to support delivery of the Regional Priority Intervention Fund and the Access to Cycles and Cycle Storage Fund. It is anticipated that approximately 45% of the total funds provided to SEStran will be passed onto third parties, which is in line with the figure for 24/25 (as above, this figure may vary as a result of changes to the total funding available and as Local Authorities decide on projects they may wish to carry out internally, or ask third party organisations to provide). Under sections 3 and 4 of the Grant Standing Orders, as grant are anticipated to be up to £1million:
- The overarching eligibility criteria and the overarching assessment criteria are to be developed by the Partnership Director and approved in advance by the Partnership Board.
  - Applications shall be assessed and evaluated by at least 2 SEStran officers against the agreed assessment criteria. A panel will be formed, chaired by the Partnership Director, to review the assessments in line with the agreed criteria and grant awards shall be delegated to the Partnership Director for approval (within the agreed annual budget) based on the advice of the panel and reported to the Board for noting at its next meeting.
- 4.4.2 The grant eligibility and assessment criteria for this fund is presented at Appendix 2 for approval. These set out:
- The types of projects that will be eligible for funding, in line with the People and Place Delivery Plan
  - The types of organisations that can apply
  - The assessment process to ensure best value
- 4.4.3 It is anticipated that some minor changes will be made to the project section of the eligibility criteria for this grant as detailed discussion with Local Authorities identify areas they wish to deliver in house and elements that they wish SEStran to source an external provider for. Delegated authority is therefore also requested for the Partnership Director to make changes to this section of the criteria under these specific circumstances.

## 4.5 The Community Grants Fund

4.5.1 The final grant fund that will be offered is a community grant fund. It is anticipated that this will be in the region of £400,000 (although as noted above this is subject to change based on the funding available). As it is anticipated that grants in this fund will be up to £50,000, under sections 3 and 4 of the Grant Standing Orders:

- The overarching eligibility criteria and the overarching assessment criteria are to be developed by the Partnership Director and approved in advance by the Partnership Board.
- Applications shall be assessed and evaluated by at least 2 SEStran officers against the agreed assessment criteria and grant awards shall be delegated to the Partnership Director for approval (within the agreed annual budget) based on the outcome of this assessment and reported to the Board for noting at its next meeting.

4.5.2 The grant eligibility and assessment criteria for this fund is presented at Appendix 3 for approval. These set out:

- The types of projects that will be eligible for funding, in line with the People and Place Delivery Plan
- The types of organisations that can apply
- The assessment process to ensure best value

4.5.3 These criteria have been developed jointly with SPT and Tactran, and the hope is that they will be able to use the same criteria for their community fund to assist organisations that work across the 3 RTPs. To support this aim, minor changes may be made to these criteria to support alignment across the RTPs, and the Board is asked to delegate authority to Partnership Director to make changes to these criteria under these specific circumstances.

## 5 NEXT STEPS

5.1 Following Board approval, the Delivery plan will be submitted to Transport Scotland as part of the wider Scottish Government Accountable Officer (AO) approval process. The key milestones for this process are:

Milestone	Actioned by	Date
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Scottish Budget Bill published – draft spending plans for 2025/26	Scottish Government	4 <sup>th</sup> December 2024
RTPs to submit first draft proposals to TS	RTPs	16 <sup>th</sup> December 2024
Final project proposals received from RTPs	RTPs	31 <sup>st</sup> January 2025
Drafting and TS review of AO templates	Transport Scotland	February 2025
Stage 2 & 3 Budget Bill process	Scottish Government	TBC as part of Stage One Debate (4 December)
Issue Grant Offer Letters to RTPs	Transport Scotland	March 2025

5.2 In order to issue grant offers as close as early as possible to allow project commencement on 1<sup>st</sup> April 2025, subject to Board approval, SEStran will run a grant process alongside these TS approvals. To give additional certainty, we will issue ‘in principle’ decision letters which will set out SEStran’s intention to award funding to a certain value subject to a TS grant offer letter being agreed by SEStran and Partnership Board approval of the 25/26 Partnership Budget. Current timelines are as follows:

- For grants to Local Authorities, discussions will begin on projects to be funded from 9<sup>th</sup> December, with the intention of finalising this early in the new year (this will likely be late February when there is certainty about the final grant award to SEStran).
- For grants to third parties under the Regional Priority Intervention Fund and the Access to Cycles and Cycle Storage Fund:

Milestone	Date
Pre Application Support	9 <sup>th</sup> December 2024 – 24 <sup>th</sup> January 2025
Draft Application Documents published	13 <sup>th</sup> January 2025
Grant applications open	27 <sup>th</sup> January 2025
Grant applications close	14 <sup>th</sup> February 2025
Grant application scoring	w/c 17 <sup>th</sup> February 2025
Grant funding panel	27 <sup>th</sup> February 2025
Decisions in principle issued*	w/c 10 <sup>th</sup> March 2025

- For grants to third parties under the Community Grant Fund:



Milestone	Date
Pre Application Support	27 <sup>th</sup> January – 21 <sup>st</sup> February 2025
Draft Application Documents published	27 <sup>th</sup> January 2025
Grant applications open	24 <sup>th</sup> February 2025
Grant applications close	14 <sup>th</sup> March 2025
Grant application scoring	w/c 17 <sup>th</sup> March 2025
Application decisions made	w/c 31 <sup>st</sup> March 2025
Decisions in principle issued*	w/c 7 <sup>th</sup> April 2025

## 6 RECOMMENDATIONS

6.1 The Partnership Board is asked to:

- Note and discuss the content of this report and approve the People and Place Delivery Plan at Appendix 1
- Delegate to the Partnership Director the setting of the fund values as noted at paragraph 4.2 for Grants to Local Authorities, Grants to Third Parties, and the Community Grant Fund.
- Approve the eligibility and assessment criteria at Appendix 2 for grants to third parties, and delegate to the Partnership Director the ability to vary the project section of the eligibility criteria as set out in paragraph 4.4.3
- Approve the eligibility and assessment criteria at Appendix 3 for the community grant fund and delegate to the Partnership Director the ability to vary these criteria to support alignment with SPT and Tactran as set out in paragraph 4.5.3

Michael Melton

**Programme Manager**

6<sup>th</sup> December 2024

**Appendix 1:** SEStran People and Place Delivery Plan

**Appendix 2:** SEStran People and Place Grant Fund – Eligibility and Assessment Process

**Appendix 3:** SEStran People and Place Community Grant Fund – Eligibility and Assessment Process

Policy Implications	The People and Place Delivery Plan aligns with the objectives of the RTS and therefore will help deliver on SEStran's policy objectives
Financial Implications	Project management costs for 2025/26 will be included in the overall Plan budget, so there is no anticipated financial impact.
Equalities Implications	In supporting people to travel actively, this Plan should have a positive impact on equalities. Specific elements of the Plan have been designed to further support the accessibility of active and sustainable travel, with an objective include around this to ensure that this is measured. A programme wide IIA has been produced and will be shared, and all projects will be expected to implement the recommendations of this where appropriate.
Climate Change Implications	In promoting behaviour change from private cars to active and sustainable travel, the People and Place Plan will support the transition to net zero.

## SEStran People and Place Delivery Plan

Document no: 3  
Revision



## SEStran People and Place Delivery Plan

Client name: SEStran

Client reference:

Document no: 3

Revision:

Date: 22<sup>nd</sup> November 2024

Project name: SEStran People & Place

Project no: B2472300

Project manager: Caley McDowall

Prepared by: Caley McDowall

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2	30/09/24	Updated draft following discussion with SEStran	CMcD	JM	TJS	TJS
3	07/10/24	Draft for partner comment	CMcD	JM	TJS	TJS
4	28/10/24	Draft final delivery plan	CMcD	JM	TJS	TJS
5	22/11/24	Final delivery plan for Board approval	CMcD	JM	TJS	TJS

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## Contents

<b>Foreword</b> .....	<b>1</b>
<b>1. Introduction</b> .....	<b>1</b>
<b>2. The evidence base for behaviour change</b> .....	<b>2</b>
2.1 Defining behaviour change.....	2
2.2 A supportive policy framework.....	2
2.3 Evidence of what works best.....	3
2.4 Key success factors.....	3
2.5 Complementary programmes and capacity.....	3
2.6 Ongoing active and sustainable travel infrastructure improvements.....	4
<b>3. Delivery Plan</b> .....	<b>5</b>
3.1 Programme objectives.....	5
3.2 How funding will be allocated.....	6
3.2.1 Regional Priority Intervention Fund.....	6
3.2.2 Local Authority delivery support.....	6
3.2.3 Community grant fund.....	6
3.2.4 Access to cycles and storage fund.....	6
3.2.5 Regional projects and programme management.....	6
3.3 P&P roles and responsibilities.....	6
<b>4. Priority interventions</b> .....	<b>0</b>
4.1 Delivery priorities .....	0
4.2 Priority intervention types, projects and locations .....	8
4.3 Timescales for the Plan.....	12
<b>5. Monitoring and evaluation</b> .....	<b>14</b>
5.1 Introduction .....	14
5.2 Key Performance Indicators and Outcome Monitoring.....	14
5.3 Baseline Monitoring .....	19
5.4 Reporting.....	19
5.5 Dissemination Plan.....	19
<b>6. Uncertainty and risk</b> .....	<b>19</b>
<b>7. Integrated Impact Assessment</b> .....	<b>21</b>

## Tables

Table 1. Roles and responsibilities.....	7
Table 2. Priority intervention types and outcomes.....	7
Table 3. Priority intervention locations/projects .....	8
Table 4. Allocation of priority intervention types by location .....	12
Table 5. Anticipated delivery timeframe by Local Authority.....	13
Table 6. Key Performance Indicators and Outcome Monitoring.....	15
Table 7. Project-level M&E.....	19
Table 8. Risks and Uncertainties.....	20

## Foreword

Following on from the first year of the People and Place programme in 2024/25, this Delivery Plan will guide our implementation of People and Place in the coming years. It will contribute to our objectives, as outlined in the Regional Transport Strategy, to support a transition to a sustainable, post-carbon transport system and facilitate healthier travel options. Our plan represents a bold new direction for sustainable transport behaviour change in the region. Year by year funding that is spread widely with little coordination has led to a proliferation of relatively small single year projects. This has not provided the certainty needed to deliver at scale nor enabled the level of change required.

To deliver meaningful change, we firmly believe that we need to target funding where it is most likely to have an impact and at communities who need this change the most. We need to present a longer term vision to support certainty in delivery. This plan will do just that.

It takes a policy and evidence led approach to set out key priorities for investment over the next 1-3 years. This includes investing in Levenmouth which will build on the regionally significant investment in the reopened railway line and active travel network, and supporting the development of journey hubs to facilitate multi-modal journeys in East Lothian.

Alongside this prioritisation, we will directly fund Local Authorities to build internal capacity and deliver projects that are important to them locally. We will support access to cycles and cycle storage through funding that will be available across the region and that will aim to provide everyone that cannot otherwise access an appropriate cycle to be able to. We will work with local groups by running a community grant fund to support them to deliver change in their communities.

This plan cannot be delivered without the support of our 8 partner Local Authorities. We commit to working with them to develop programmes of projects that will deliver change within the regional priority areas, and then funding the delivery of these programmes appropriately. We also welcome the input and experience of the various delivery organisations, from national to community level, who will play a key role in delivering projects on the ground, and look forward to continuing to work with them.

It is important to stress that this is not a fixed document, it will be a living document that adapts over time as new priorities emerge and the funding landscapes change. We will work with our partners to review progress annually, learn lessons from robust monitoring and evaluation, and make the necessary changes.

Finally, we'd like to thank everyone that has contribute to the development of this plan, from our partner Local Authorities to current delivery partners and wider stakeholders. We'd also like to thank Transport Scotland for their continued funding to develop this plan and to deliver on its aspirations.

**Brian Butler**  
Partnership Director

## 1. Introduction

SEStran's People & Place (P&P) commenced in 2024/25 and is a key part of the regional delivery of travel behaviour change in South East Scotland. It utilises funding from Transport Scotland to encourage and enable more people to make active and sustainable travel choices.

This document sets out the Delivery Plan for P&P for future years. It establishes the regional priorities for change, how funding will be prioritised, and how SEStran will work with Local Authorities and delivery partners to provide a holistic approach to support broader transport outcomes.

The Delivery Plan is structured as follows:

- Section 2 provides an overview of the evidence base for behaviour change; the policy context, success factors, complementary activity and capacity to deliver
- Section 3 sets out the plan objectives, the funding pots that deliver on these, and the expected roles and responsibilities of SEStran and its partners for planning, delivery and evaluation of interventions
- Section 4 provides detail on the Regional Priority Intervention Fund, including the regional priorities for change and how these priorities are intended to be delivered across the region
- Section 5 provides a framework for how the process, inputs, outputs and outcomes of P&P investment will be monitored and evaluated
- Section 6 highlights issues related to uncertainty and risk
- Section 7 provides a summary of the Integrated Impact Assessment
- Appendix A summarises current status of each Local Authority's Local Transport Strategy and Active Travel Strategy
- Appendix B summarises available evidence of behaviour change interventions
- Appendix C is the full Integrated Impact Assessment for this Delivery Plan

## 2. The evidence base for behaviour change

### 2.1 Defining behaviour change

There are well-understood prerequisites for more people to walk, wheel, cycle and use other sustainable transport modes more often. Transport Scotland's 2016 Review of Active Travel Policy Implementation<sup>1</sup> states:

*"The projects that policies are seeking to deliver in order to increase active travel rates typically rely on investment to be made in four types of initiatives, to be able to provide for the target individual or location:*

- *The right infrastructure (footways and cycle routes that are of good quality and connect the right places, along with associated infrastructure, such as cycle parking);*
- *The right information, so that people know what routes and opportunities to travel actively are available to them;*
- *The right enablers of change so that people who feel unable to travel actively can try it (access to bikes, cycle training, led walks, etc.); and*
- *The right attitudes, so that more people perceive active travel options as attractive and relevant to their journey choices or leisure time activities."*

Behaviour change activities within P&P are relevant to the last three of these points. Similar considerations are also relevant for the promotion of other sustainable transport modes which are within the scope of P&P.

#### Transport Scotland's definitions of active and sustainable travel

**Active travel** is walking, wheeling or cycling for a purposeful journey. Wheeling includes using a wheelchair or mobility aid as an alternative to walking.

**Sustainable travel** can be defined as including active, public and shared transport modes. However, in the context of P&P, the focus is on projects that involve solutions that can specifically improve travel planning and encourage more joined-up journeys. Eligible sustainable travel projects should include at least one of the following elements:

- Shared transport (such as introduction or expansion of car clubs, bike and e-bike share schemes, as well as car share/ lift-share)
- (Digital) Demand Responsive Transport schemes
- Mobility Hubs (full and pop-up)
- Real Time Passenger Information (RTPI) provision
- Support for MaaS project roles

### 2.2 A supportive policy framework

Active and sustainable travel behaviour change contributes to delivering the First Minister's priorities as set out in the Programme for Government<sup>2</sup>:

- Eradicating child poverty: initiatives to promote sustainable travel including improving access to bikes for children and their family groups can help overcome the barriers to accessing opportunities (including for education, training and employment) and services amongst more deprived households
- Growing the economy: people travelling by active and sustainable travel modes commonly spend more in local shops than those that use other modes<sup>3</sup>; good access to public transport and facilities for active travel can help many businesses access more customers, and also to expand the pool of labour that is available to them
- Tackling the climate emergency: active travel modes are the most sustainable transport choices with no carbon emissions at the point of use, and the marginal carbon cost of public transport use is often very low
- Ensuring high quality and sustainable public services: this Delivery Plan aims to improve quality and efficiency of delivery of behaviour change activities across the SEStran region

National, regional and local policies are supportive of active and sustainable travel behaviour change.

Transport Scotland's National Transport Strategy<sup>4</sup> outlines a vision that *"we will have a sustainable, inclusive, safe and accessible transport system, helping deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors"*. The vision is underpinned by four priorities:

- Reducing inequalities
- Taking climate action
- Helping deliver inclusive economic growth
- Improving our health and wellbeing

Transport Scotland's Active Travel Framework<sup>5</sup> lists five outcomes for improving the uptake of walking, wheeling and cycling for travel:

- Increase the number of people choosing walking, cycling and wheeling in Scotland
- High-quality walking, cycling and wheeling infrastructure is available to all
- Walking, cycling and wheeling is safer for all
- Walking, cycling and wheeling is available to all
- Delivery of walking, cycling and wheeling is promoted and supported by a range of partners

SEStran's Regional Transport Strategy<sup>6</sup> includes actions to 'deliver safe active travel' (section 7.3, page 62):

- *"Promotional and communication campaigns to highlight the benefits of active travel across the region and encourage people to adopt it where possible"* and
- *"Expand the provision of bike sharing initiatives across the region"*.

<sup>1</sup> <https://www.transport.gov.scot/media/10302/tp-active-travel-policy-implementation-review-october-2016.pdf>

<sup>2</sup> <https://www.gov.scot/publications/programme-government-2024-25-serving-scotland/>

<sup>3</sup> [https://www.dundee.gov.uk/sites/default/files/publications/benefits\\_of\\_active\\_travel\\_in\\_dundee\\_final.pdf](https://www.dundee.gov.uk/sites/default/files/publications/benefits_of_active_travel_in_dundee_final.pdf)

<sup>4</sup> <https://www.transport.gov.scot/media/47052/national-transport-strategy.pdf>

<sup>5</sup> <https://www.transport.gov.scot/media/47158/act09190900361.pdf>

<sup>6</sup> <https://sestran.gov.uk/sestran-2035-regional-transport-strategy/>



Policies to ‘enhance access to and accessibility of public transport’ include (section 8.2, page 66):

- “Public transport information should be provided in a variety of formats to meet the specific needs of all users” and
- “Shared mobility solutions should be implemented to provide enhanced access to a wider range of transport options without the requirement for ownership”.

Policies to ‘reduce car kilometres’ include (section 15.2, page 107):

- “Support behaviour change and the use of more sustainable modes of transport by a combination of enhanced infrastructure, information provision, innovation and measures to discourage car use” and
- “The RTS will support the national, regional and local behaviour change and demand management Route Map interventions to encourage a longterm, sustainable change to daily public transport/active travel habits”.

Every Local Transport Strategy (LTS) and Active Travel Strategy (ATS) which has been published by the region’s eight Local Authorities is supportive of progressing behaviour change measures to promote active travel and other forms of sustainable travel<sup>7</sup>. The current status of LTS and ATS documents by Local Authority, along with other relevant policy documents, is summarised in Appendix A.

### 2.3 Evidence of what works best

Systematic reviews have reported that behaviour change programmes can decrease private motor vehicle trips by 5–15%<sup>8</sup>. Research undertaken for the Department for Transport showed that even modest measures are likely to increase sustainable transport use in a target community by 7%, and the most effective by 34%<sup>9</sup>.

Appendix B provides a summary of available evidence of the types of interventions that can be successful at achieving active and sustainable travel behaviour change. Evidence is summarised by theme; schools, workplaces and community settings.

However, in general, the evidence base for which types of behaviour change measures offer better or worse value is not strong at a scheme comparative level. Though evaluation data is available from many previous projects, those projects mostly have too many specific nuances in their design and delivery to make it possible to draw robust conclusions that some types of projects usually perform better than others.

### 2.4 Key success factors

Previous experience and best practice (some of which is contained within the evidence review in Appendix B) should help ensure that investment in behaviour change is targeted towards higher value projects. However as noted above, there are limitations in the available evidence to provide a steer towards particular types of projects and not others. Instead, evidence suggests that behaviour change measures have the potential to be effective in almost any setting, but there are factors which are likely to improve cost-effectiveness. P&P is building on lessons from the delivery of other travel behaviour change projects across Scotland and the UK, which suggests that better value is achieved if:

- Key stakeholders (elected members, school staff, community leaders) and a majority of the target audience are actively supportive of projects, as without this its effectiveness is likely to be undermined

- Project messages, communications tools and activities are closely aligned both to outcome objectives and target audience’s needs/ aspirations, to ensure that they are properly targeted and resonate with the audiences
- Interventions should be targeted towards specific audiences (not spreading investment too thinly)
- Projects provide cohesive packages of measures which support the same behavioural outcome (for example providing cycle training to school pupils and improved cycle parking immediately following improvements to cycle routes to the school, and concurrently with campaign activity to communicate with parents/ carers)
- Delivery is of high quality (as perceived by the target audience and key stakeholders) to build confidence in what is being delivered and thus elicit change
- Interventions are focussed on life events that can influence travel choices (such as moving house or starting or changing school or job) or that complement new/ improved/ existing active travel infrastructure or transport services
- Projects are of sufficient scale to achieve value
- Sufficient time is available for the project to become embedded within its target community (and for efficiencies of staffing and delivery to be realised), not least as people are at different stages of change at any given time
- Monitoring and evaluation processes are of appropriate scale and in-built from the outset

### 2.5 Complementary programmes and capacity

There is a range of other projects and programmes, both national and local, that P&P will seek to integrate with where appropriate, including but not exclusively those listed below. Many of these complementary projects and programmes can provide capacity support and help to expand the scope and reach of PP interventions, helping to drive efficiency of project planning and delivery.

- Local Authority funded initiatives
- Bus Partnership Fund funded improvements
- Young Persons’ (Under 22s) Free Bus Travel Scheme and other public transport promotions
- Bikeability Scotland
- Active travel infrastructure improvement projects, including those funded by Places for Everyone, the National Cycle Network and Ian Findlay Path Fund
- NHS Scotland Climate Emergency and Sustainability Strategy 2022-2026 measures
- Local bicycle recycling schemes
- Local adult cycle training initiatives
- Local health/ group walks initiatives
- Local social prescribing programmes

<sup>7</sup> Though not all Local Authorities have current Local and/ or Active Travel Strategies in place

<sup>8</sup> Brög et al., 2009, Chatterjee, 2009, Möser and Bamberg, 2008, Petrunoff et al., 2016, Scheepers et al., 2014

<sup>9</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/938915/tag-m5-2-modelling-smarter-choices.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/938915/tag-m5-2-modelling-smarter-choices.pdf)



- Other types of local behaviour change initiatives (including schools programmes, workplace programmes, community programmes and training)

## **2.6 Ongoing active and sustainable travel infrastructure improvements**

As noted previously, behaviour change interventions can often be more effective if they complement enhancements to active travel infrastructure or transport services. Local Authorities are undertaking a range of improvement projects and schemes across the region that seek to create high-quality routes for walking, wheeling and cycling, and to improve public transport services and associated facilities. P&P will seek to maximise the value of this investment where appropriate, through complementary behaviour change projects that raise awareness and encourage use of new or improved routes, services and facilities.

### 3. Delivery Plan

SEStran’s P&P seeks to deliver measures that encourage and enable more people to walk, wheel, cycle and use other sustainable transport modes more often. It will enable a significant contribution to be made to the region’s transport priorities.

The programme seeks to work in all of the region’s eight Local Authority areas to provide a balanced package targeted at all the four themes as set by Transport Scotland:

- *Behaviour change theme* Schools and Young People
- *Behaviour change theme* Workplaces
- *Behaviour change theme*: Accessibility and Inclusion
- *Underpinning theme*: Capacity and Capability

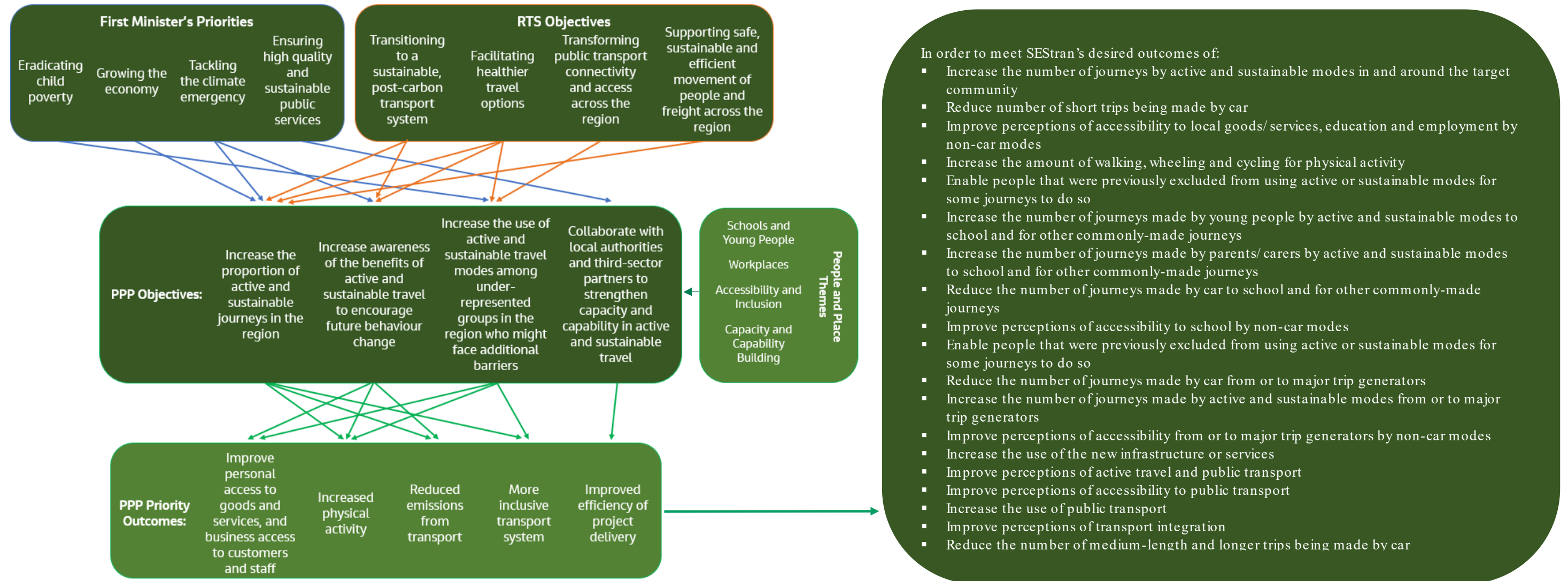
#### 3.1 Programme objectives

SEStran’s P&P will:

- Increase the proportion of active and sustainable journeys in the region
- Increase awareness of the benefits of active and sustainable travel to encourage future behaviour change
- Increase the use of active and sustainable travel modes among underrepresented groups in the region who might face additional barriers
- Collaborate with local authorities and third-sector partners to strengthen capacity and capability in active and sustainable travel

Its focus will be on travel for functional journeys though changed travel habits for leisure may also be supported where this can be demonstrated to contribute to regional health and/or economic development objectives.

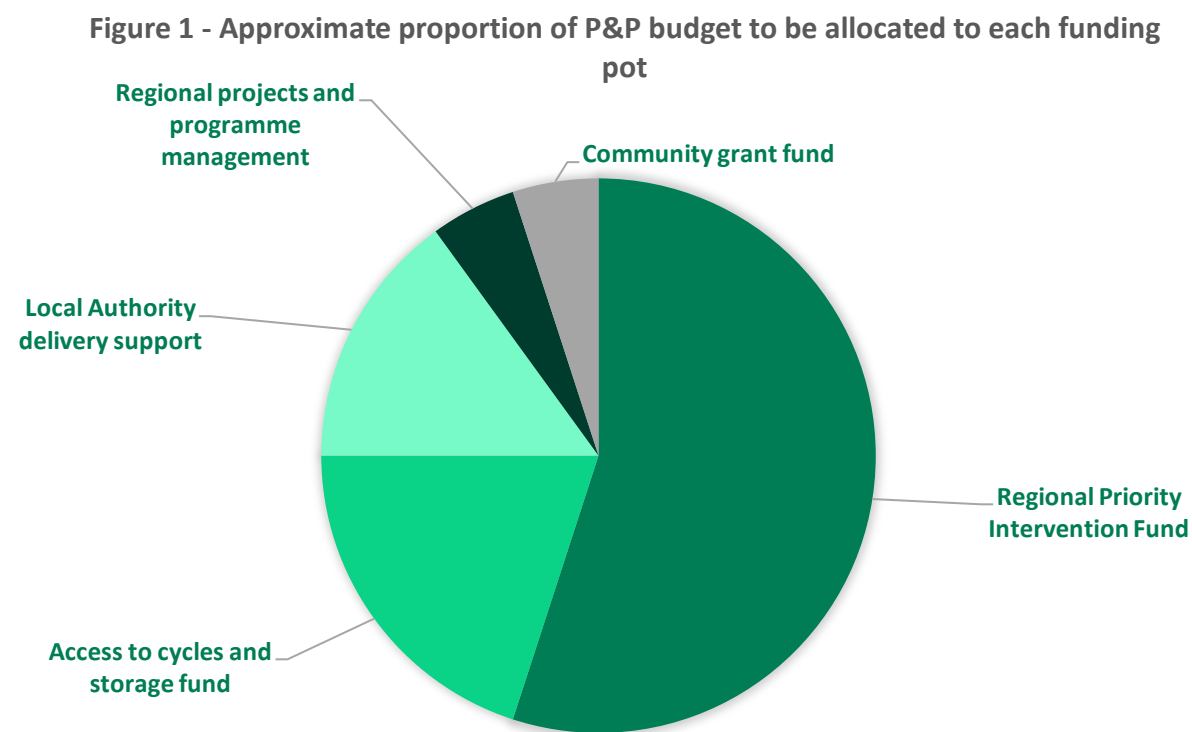
The logic map below shows how the objectives for SEStran’s P&P have been developed from key national and regional priorities and how they will be measured:



### 3.2 How funding will be allocated

SEStran will distribute the P&P budget across five funding areas as outlined in the list below. In alignment with this Delivery Plan, the majority of the budget will be allocated to the priority interventions. The four other funding pots are in place to address other key areas of delivery to support sustainable transport behaviour change across the region:

- Regional Priority Intervention Fund
- Local Authority delivery support
- Community grants fund
- Access to cycles and storage fund
- Regional projects and programme management



#### 3.2.1 Regional Priority Intervention Fund

**Description:** This fund supports the main programme delivery. Project proposals will be invited to deliver according to the priority interventions and key outcomes of the Delivery Plan, as detailed within this document. These interventions are designed to be delivered over 1-3 years as detailed in Table 5. One of the key drivers for developing a plan that identifies interventions for a number of future years is to be able to provide some degree of funding certainty for people and projects. As part of this, SEStran is investigating the potential to offer grant agreements that have extension clauses built in that can be activated subject to performance and funding availability.

**Eligibility:** Local Authorities and other public bodies, along with community groups, CICs, and charities who have experience of delivering sustainable transport behaviour change projects at scale and so it is assumed that projects will have a minimum value of £50,000.

#### 3.2.2 Local Authority delivery support

**Description:** This will be used to support Local Authorities to deliver sustainable transport behaviour change projects, to supplement Transport Scotland funding direct to Local Authorities (Local Authority People & Place). SEStran recognises the key role played by Local Authorities in active and sustainable travel behaviour change and the funding and resource pressures that they are facing. To support the benefits they can provide, SEStran will provide a funding top-up to each Local Authority, which will be available for Local Authorities to spend to support local project delivery.

This funding will have both capital and revenue elements, and it is SEStran’s intention that, over the course of this Delivery Plan, the revenue element of this top up (combined with the Local Authority People & Place award) will match or exceed each Authority’s revenue allocation under the previous Smarter Choices Smarter Places LA Fund. Given the lack of certainty on future revenue allocation to P&P, a timescale on achieving this cannot currently be given.

**Eligibility:** Local Authorities in the SEStran region.

#### 3.2.3 Community grant fund

**Description:** This is a grant fund to support community organisations looking to deliver sustainable transport projects within the SEStran region. Project outcomes should align with the P&P objectives and should relate to one or more of the three behaviour change People and Place themes: schools and young people, workplaces and accessibility and inclusion.

**Eligibility:** Community groups, CICs and charities delivering within the SEStran region. It is assumed that projects in this fund will be in the region of £5,000 to £50,000.

#### 3.2.4 Access to cycles and storage fund

**Description:** A fund to support access to cycles and cycle storage in the SEStran region. Access to cycles includes the purchase of new cycles, cycle share schemes, recycling of cycles and repair of cycles.

**Eligibility:** Local Authorities and other public bodies, community groups, CICs, and charities.

#### 3.2.5 Regional projects and programme management

**Description:** This area will consist of a small number of projects that are run regionally and managed by SEStran. This will also cover regional programme management and evaluation.

### 3.3 P&P roles and responsibilities

This section details how the funding described above will be managed; recognising that Local Authorities are SEStran’s key partners in the delivery of a successful programme for the region.

Funding and delivery of behaviour change has changed significantly since the start of 2024, from a long-standing previous position. The complexities of funding and delivery pathways are recognised, and therefore a clearly-defined set of roles and responsibilities is an important element of the Delivery Plan; to

ensure that SEStran and Local Authorities understand how behaviour change interventions in the region will be managed over the timeframe of the Delivery Plan.

P&P will support the achievement of financial savings in project planning and delivery through improved synergies and partnership working across Local Authority boundaries across the region. SEStran will work with Local Authorities and partners to identify where these opportunities exist.

Table 1 sets out the anticipated roles and responsibilities of SEStran and Local Authorities to manage the requirements of the overall P&P programme. Responsibilities are noted in **bold** text.

SEStran recognises the importance of a broad range of partners who can provide support to deliver projects. Although not noted in the table below, it is recognised that delivery organisations commissioned to deliver projects within each of the priority interventions have a responsibility to SEStran to deliver the requirements of their brief/scope, and can also use their experience and local knowledge to provide valuable inputs to the scoping and development of projects. SEStran and Local Authorities look forward to working with a range of delivery partners through these development and delivery phases.

Table 1. Roles and responsibilities

Theme	Roles and responsibilities of SEStran	Roles and responsibilities of Local Authorities
Programme planning & management	<p><b>Planning of P&amp;P programme and interventions</b> Could lead regional approach to national projects where relevant</p>	<p><b>Planning of Local Authority People &amp; Place projects and interventions</b> <b>Support SEStran in the planning of P&amp;P interventions</b></p>
Project funding	<p><b>Allocation and management of funding through P&amp;P and small grants community fund</b></p>	<p><b>Management of funding awarded through Local Authority People &amp; Place and other funding schemes, where relevant</b></p>
Project procurement	<p><b>Procurement of priority regional interventions (as stated in Section 4 below)</b> Could provide procurement support to Local Authorities, for example through centralised procurement models and recommended supplier lists</p>	<p><b>Procurement of local interventions awarded through Local Authority People &amp; Place and other funding schemes, where relevant</b></p>
Project delivery	<p><b>Manage delivery of interventions</b> (although expected that most delivery would be undertaken by a range of delivery organisations) Support co-ordination of projects across region where relevant (through improved communications and knowledge-sharing)</p>	<p><b>Support delivery of P&amp;P interventions</b> (although expected that most delivery would be undertaken by a range of delivery organisations, including Local Authorities) Other local project delivery as appropriate</p>
Project monitoring & evaluation	<p><b>Lead the monitoring and evaluation of P&amp;P (overall programme and by intervention)</b> <b>Programme and project risk management and mitigation</b> Could assist Local Authorities with monitoring and evaluation of Local Authority People &amp; Place interventions Could provide standardised template for impact assessments</p>	<p><b>Support the monitoring of P&amp;P interventions</b> Monitoring and evaluation of Local Authority People &amp; Place (depending on local priorities)</p>
Communications and knowledge-sharing	<p>Lead cross-Local Authority/cross-RTP/cross-partner communications and knowledge-sharing activities Update Local Authorities on news/relevant information from Transport Scotland Communicate Local Authority issues, concerns, successes to Transport Scotland Hold regular one-to-one progress meetings with Local Authorities</p>	<p>Participate in communications and knowledge sharing activities led by SEStran Respond to requests for feedback via SEStran to Transport Scotland Participate in progress meetings</p>



## 4. Priority interventions

This section provides further detail of how the Regional Priority Intervention Fund will be allocated.

### 4.1 Delivery priorities

Whilst P&P enables the investment of significant public funds into behavioural change, it cannot deliver every possible project in the region. As noted in ‘A guide to delivering effective SCSP projects’<sup>10</sup>, transport behaviour change projects “cannot hope to encourage everyone in a local authority area to adopt every type of sustainable and active travel choice. In order to target and develop appropriate and effective interventions, segmentation of the whole potential market into manageable portions is essential”.

The guide also notes that “Focussed transport initiatives on particular target groups work much better than initiatives based on ‘wishful thinking’. Initiatives that have not nailed down whose behaviour they are trying to tackle consequently end up being ‘all things to all people’ and often result in little sustainable impact or effect”.

Because of this evidence and that given in section 2, SEStran’s P&P will take a targeted approach in order to achieve the programme’s objectives, prioritising funding between intervention types, locations and target groups.

There is no single clear-cut mechanism to do this, not least because:

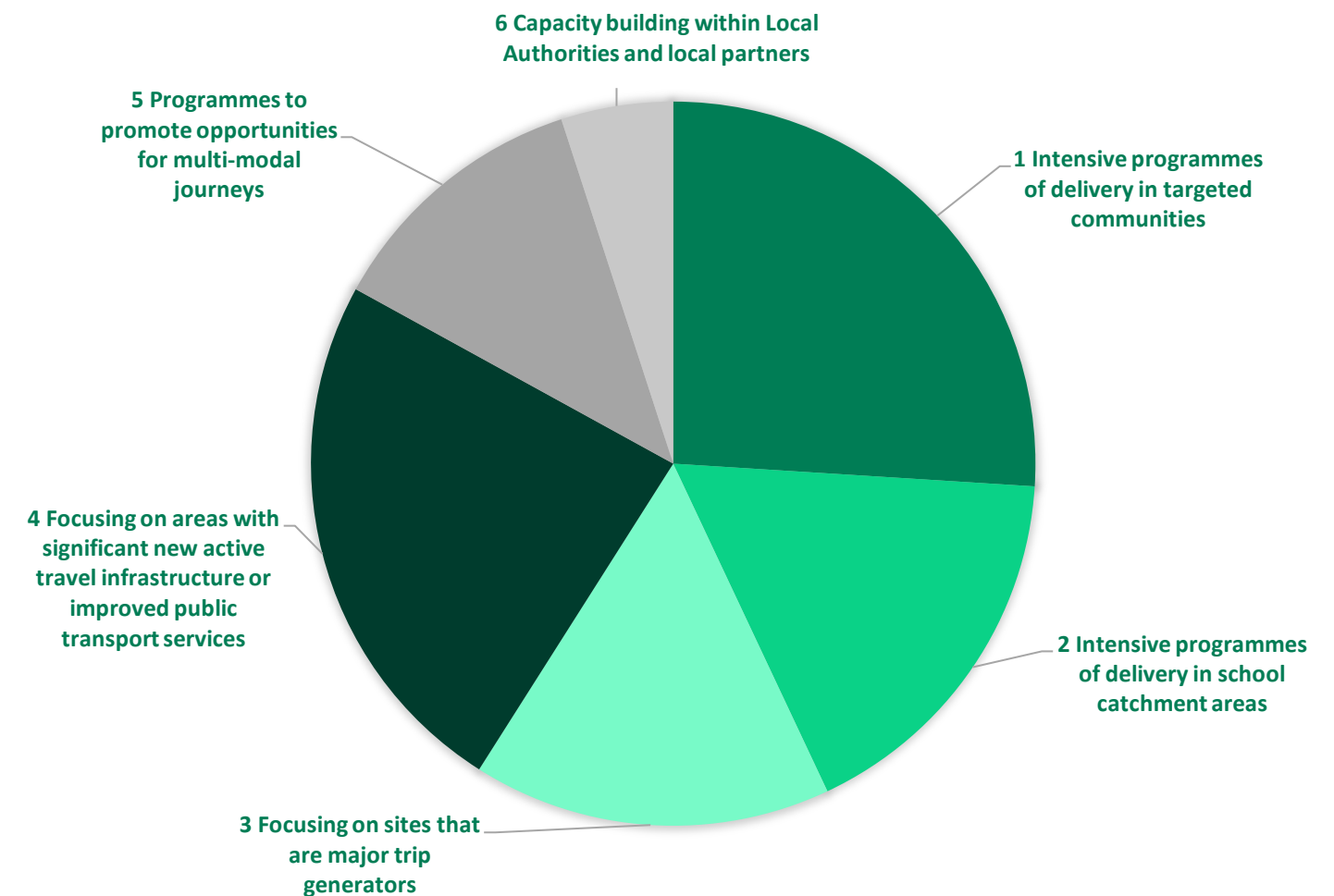
- Whilst policy is supportive of behaviour change towards active and sustainable travel choices, it does not give guidance towards any one outcome being more important than others in all settings in the region
- The evidence base of which types of interventions offer best value is relatively weak, as value is often determined by local factors including those listed in section 2
- The region is diverse, and SEStran wants to ensure that investment is distributed across its geography and types of community

SEStran will therefore prioritise initial delivery of P&P towards six intervention types; informed by the base of available evidence, as well as knowledge of other ongoing activity and available capacity, as described in section 2. The experiences and lessons learned from the 2024/25 transition year so far have also been used to inform decision-making. These intervention types are intended to:

- Ensure investment is provided into all four of the P&P themes
- Provide opportunities for all of the region’s Local Authorities to engage with P&P, through projects that support local needs and priorities
- Deliver projects in early years of the programme which deliver a wide range of interventions with a broad range of target audiences such that, supported by effective monitoring and evaluation, the programme can be refined towards focus on the most impactful projects

The six priority intervention types are shown in the figure below, which also shows an anticipated allocation of funding between them. Table 2 provides more detail, along with the expected outcomes and rationale for selection for intervention type.

Figure 2 - Approximate proportion of Priority Fund budget to be allocated to each priority intervention type



SEStran understands the imperative of driving increased value for money in behaviour change and will seek to ensure that the key success factors described in section 2 are incorporated into the planning and delivery of every aspect of P&P. SEStran will work in partnership with Local Authorities and delivery partners to undertake scoping and planning to develop projects under each intervention type.

<sup>10</sup> [www.pathsforall.org.uk/mediaLibrary/other/english/a-guide-to-delivering-effective-scsp-projects.pdf](http://www.pathsforall.org.uk/mediaLibrary/other/english/a-guide-to-delivering-effective-scsp-projects.pdf)

Table 2. Priority intervention types and outcomes

Priority intervention	Priority outcomes	Rationale for selection
<p><b>1. Intensive programmes of delivery in targeted communities</b> This intervention will target specific geographic communities classed as disadvantaged, and which have an identified community need for promoting active and sustainable travel</p>	<ul style="list-style-type: none"> <li>▪ Increase the number of journeys by active and sustainable modes in and around the target community</li> <li>▪ Reduce number of short trips being made by car</li> <li>▪ Improve perceptions of accessibility to local goods/ services, education and employment by non-car modes</li> <li>▪ Increase the amount of walking, wheeling and cycling for physical activity</li> <li>▪ Enable people that were previously excluded from using active or sustainable modes for some journeys to do so</li> </ul>	<ul style="list-style-type: none"> <li>▪ Helps create more accessible and inclusive communities, one of the four key P&amp;P themes</li> <li>▪ Supports broader policy outcomes aimed at tackling deprivation</li> <li>▪ Enables improved targeting of interventions, by focussing on a specific geographic community</li> <li>▪ Can deliver multiple outcomes (inclusion, health, reduced emissions, etc) in any given area</li> </ul>
<p><b>2. Intensive programmes of delivery in school catchment areas</b> This intervention will target specific schools/school clusters to target pupils, their family groups and broader communities in the vicinity of schools</p>	<ul style="list-style-type: none"> <li>▪ Increase the number of journeys made by young people by active and sustainable modes to school and for other commonly-made journeys</li> <li>▪ Increase the number of journeys made by parents/ carers by active and sustainable modes to school and for other commonly-made journeys</li> <li>▪ Reduce the number of journeys made by car to school and for other commonly-made journeys</li> <li>▪ Improve perceptions of accessibility to school by non-car modes</li> <li>▪ Enable people that were previously excluded from using active or sustainable modes for some journeys to do so</li> </ul>	<ul style="list-style-type: none"> <li>▪ Focuses on schools and young people, one of the four key P&amp;P themes</li> <li>▪ Interventions to influence travel choices can be more effective when focussed on a time of change such as starting, changing or leaving school</li> <li>▪ Schools offer an effective conduit to reach out to broader communities, through parents/ carers</li> <li>▪ Builds upon ongoing activity by Local Authorities to engage with schools</li> <li>▪ Schools often offer effective settings for good value behaviour change projects</li> </ul>
<p><b>3. Focusing on sites that are major trip generators</b> This intervention will target large sites that generate a significant proportion of trips by car, such as new residential and commercial developments, large employers, tertiary education and major NHS facilities</p>	<ul style="list-style-type: none"> <li>▪ Reduce the number of journeys made by car from or to major trip generators</li> <li>▪ Increase the number of journeys made by active and sustainable modes from or to major trip generators</li> <li>▪ Improve perceptions of accessibility from or to major trip generators by non-car modes</li> <li>▪ Enable people that were previously excluded from using active or sustainable modes for some journeys to do so</li> </ul>	<ul style="list-style-type: none"> <li>▪ Large sites can offer a good conduit to reach out to many individuals at one time</li> <li>▪ Interventions to influence travel choices can be more effective when focussed on a time of change such as moving house, changing job or starting university/ college</li> <li>▪ Can support other ongoing work such as improving access to healthcare, reducing NHS staff travel, improving accessibility of new developments</li> <li>▪ Helps create more accessible and inclusive communities, one of the four key P&amp;P themes</li> </ul>
<p><b>4. Focusing on areas with significant new active travel infrastructure or improved public transport services</b> This intervention will target areas where new routes for walking, wheeling and cycling, or where new public transport services, have recently been introduced</p>	<ul style="list-style-type: none"> <li>▪ Increase the use of the new infrastructure or services</li> <li>▪ Improve perceptions of active travel and public transport</li> <li>▪ Enable people that were previously excluded from using active or sustainable modes for some journeys to do so</li> </ul>	<ul style="list-style-type: none"> <li>▪ Interventions to influence travel choices can be more effective when timed to coincide with the introduction of new infrastructure or services</li> <li>▪ Maximises the value of the investment made in construction of new infrastructure or support for new services</li> </ul>
<p><b>5. Programmes to promote opportunities for multi-modal journeys</b> This intervention will focus on locations where improvements have been or are being made to improve integration between transport modes</p>	<ul style="list-style-type: none"> <li>▪ Improve perceptions of accessibility to public transport</li> <li>▪ Increase the use of public transport</li> <li>▪ Improve perceptions of transport integration</li> <li>▪ Reduce the number of medium-length and longer trips being made by car</li> <li>▪ Enable people that were previously excluded from using active or sustainable modes for some journeys to do so</li> </ul>	<ul style="list-style-type: none"> <li>▪ Supports efforts to improve integration of transport modes</li> <li>▪ Helps create more accessible and inclusive communities, one of the four key P&amp;P themes</li> </ul>

Priority intervention	Priority outcomes	Rationale for selection
<p><b>6. Capacity building within Local Authorities and local partners</b>                      This intervention will help to build capacity and capability to deliver behaviour change, through enhanced support such as targeted advice, training, provision of additional resources and sharing of knowledge and best practice</p>	<ul style="list-style-type: none"> <li>Local Authorities are better able to establish and manage effective behavioural change projects</li> <li>Local partner organisations have increased willingness, capacity and skills to establish and implement effective behavioural change projects</li> </ul>	<ul style="list-style-type: none"> <li>Is one of the four key PP themes</li> <li>Some Local Authorities have resource challenges that can often hamper efforts to deliver</li> <li>There is an interest and enthusiasm for active and sustainable travel within many local communities which, with the right support, can unlock greater capacity to deliver</li> <li>Local partners often have established relationships and trust within the community, as well as a deep understanding of the community’s specific needs and concerns. Collaborating with local partners can boost community participation and help make projects more effective</li> </ul>

#### 4.2 Priority intervention types, projects and locations

SEStran proposes to focus delivery of the six P&P priority intervention types (as described in Table 2) in the locations and/or by project focus shown in Table 3. The rationale for selection for each is provided, along with potential measures that could be delivered (by Local Authorities and/or delivery organisations) within each location/project.

These locations have been selected as, between them, they are felt to provide the best balance of investment across the range of priority intervention types and across the range of prioritisation criteria outlined in section 4.1. In each case, these locations offer the potential for multiple priority intervention types to be delivered. This is demonstrated in Table 4 which outlines how priority interventions have been allocated to each Local Authority and which intervention type it is expected they will realise.

The exact balance of projects to be delivered under each intervention theme will be subject to more detailed scoping in partnership with Local Authorities. The priority interventions for each Local Authority will be reviewed annually with partners. This review will consider how well the intervention is delivering against the priority outcomes and the delivery plan objectives and whether any changes are required.

Table 3. Priority intervention locations/projects

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
City of Edinburgh	A broad-ranging behavioural change programme in line with the City Mobility Plan that focuses on projects that impact on health and wellbeing of two priority groups: Third age (Retired, active people) and Mobility restricted (mobility restrictions due to age, health or disability) Promotion of the use of the newly completed infrastructure, in particular the areas around the Canal-Roseburn-City Centre West East Link (CCWEL)-Leith Walk active travel corridor and the connections to this Promotion of active and sustainable travel to NHS sites	Improves inclusiveness and accessibility of transport for groups often excluded from active and sustainable travel, and for whom the health benefits of more physical activity are significant Increases the benefits that can be realised from recent/new investment NHS sites are some of the region’s largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Dr Bike Social prescribing Street audits and installation of recommended facilities Community engagement and education Incentive programmes Multi-modal hubs



Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>Clackmannanshire</b>	An engagement programme with school communities: pupils, their family members/carers and others that travel to or live near school sites Promotion of active and sustainable travel to NHS sites	Sustains and builds on Clackmannanshire Council's existing schools programme, supporting the Council's priorities for investment to target young people and the wider communities in which they live and travel NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Community engagement and education Incentive programmes Capacity building (local authority and local partners)
<b>East Lothian</b>	A programme to improve and promote multi-modal journeys at specific hubs Promotion of active and sustainable travel to NHS sites	The nature of travel in East Lothian means that interchange (walk, cycle, bus, train, private car) is essential for many journeys. This project enhances and promotes opportunities to do so, and supports East Lothian Council's priorities NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Community engagement and education Incentive programmes Dr Bike Street audits and installation of recommended facilities Multi-modal hubs Capacity building (local authority and local partners)
<b>Falkirk</b>	A programme to build capacity to deliver change A broad-ranging behavioural change programme with a focus in more deprived communities, in schools, and providing continuity with existing activities Promotion of active and sustainable travel to NHS sites	A short-term priority is to build capacity within Falkirk Council and community-based partners to develop and deliver behavioural change projects Supports change in some relatively deprived communities across a range of trip types, and sustains and builds on the longstanding Take the Right Route campaign NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Dr Bike Social prescribing Street audits and installation of recommended facilities Community engagement and education Incentive programmes Capacity building (local authority and local partners)

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>Fife</b>	<p>A broad-ranging behavioural change programme in and around Leven</p> <p>A programme of investment focused on children and young people's journeys to and from schools and higher education</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>The focus on Leven enables additional support to the work of the Leven Programme, building on existing community capacity for change and the nationally important priorities for the community, as recognised by the new journey opportunities of the rail link and investment in active travel</p> <p>The focus on schools and higher education supports the Council's priorities to enable young people to make more active and sustainable travel choices, sustaining and building upon ongoing work with this target group</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Social prescribing</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Multi-modal hubs</p>
<b>Midlothian</b>	<p>A programme to improve and promote sustainable travel to new developments</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>Significant new developments are being built-out and occupied, and this project supports Midlothian Council's aspirations for as many journeys to and from them as possible to be made by sustainable modes</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Multi-modal hubs</p> <p>Capacity building (local authority and local partners)</p>

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>Scottish Borders</b>	A broad-ranging behavioural change programme in and around Hawick Promotion of active and sustainable travel to NHS sites	Initial focus in Hawick has been chosen because it supports multiple objectives (some relatively deprived communities, location of regeneration project, key areas of progress include the Hawick Action Plan <sup>11</sup> and Town Centre Marketing Pilot) and because of the recent improvements to active travel infrastructure accompanying the Hawick Flood Protection Scheme NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Dr Bike Social prescribing Street audits and installation of recommended facilities Community engagement and education Incentive programmes Capacity building (local authority and local partners)
<b>West Lothian</b>	A programme to build capacity to deliver change A broad-ranging behavioural change programme with a focus in more deprived communities and schools Promotion of active and sustainable travel to NHS sites	A short-term priority is to build capacity within West Lothian Council and community-based partners to develop and deliver behavioural change projects Other work will support West Lothian Council's aspirations to enable more people in deprived communities to benefit from active and sustainable travel choices NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Capacity building (local authority and local partners) Street audits and installation of recommended facilities Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Community engagement and education Incentive programmes

<sup>11</sup> Three key themes; making Hawick a 'Great Place for Working and Investing'; a 'Great Place for Living and Learning'; and a 'Great Destination to Visit'. Adopted Local Development Plan 2, Scottish Borders Council, [Adopted Local Development Plan 2 | Local development plan | Scottish Borders Council \(scotborders.gov.uk\)](https://www.scotborders.gov.uk/adopted-local-development-plan-2)

Table 4. Allocation of priority intervention types by location

Priority intervention type/location	City of Edinburgh	Clackmannanshire	East Lothian	Falkirk	Fife	Midlothian	Scottish Borders	West Lothian
1 Intensive programmes of delivery in targeted communities								
2 Intensive programmes of delivery in school catchment areas								
3 Focusing on sites that are major trip generators								
4 Focusing on areas with significant new active travel infrastructure or improved public transport services								
5 Programmes to promote opportunities for multi-modal journeys								
6 Capacity building within Local Authorities and local partners								

Core project focus/location
Supporting project focus/location
Not a current priority

### 4.3 Timescales for the Plan

This Delivery Plan is effective from 1<sup>st</sup> April 2025.

It is not expected that all of the intervention types listed in 2 will be priorities during the lifetime of the Plan, but that broadly, projects within them will be delivered on a two- to three-year cycle before this Delivery plan is refreshed.

Similarly, not all projects will necessarily receive the same funding allocation in each year. This is especially true for those for which some scoping and capacity building activity may be needed before intensive interventions commence. Additionally, SEStran may choose to allocate some funding to projects after intensive delivery has ceased in order to maintain a legacy of capacity and/or sustained behaviours.

An annual review will be undertaken to ensure that projects are making progress towards desired objectives and outcomes (further details are provided in section 5), and it is expected that new projects emerge later in the Delivery Plan period..

Table 5. Anticipated delivery timeframe by Local Authority

	2025/ 26				2026/ 27				2027/ 28				Longer-tem			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
<b>City of Edinburgh</b>																
Develop and deliver programme for priority communities and locations																
Sustain programme for priority communities and locations																
Define priorities for later engagement																
Develop programme for later engagement																
Deliver programme for later engagement																
<b>Clackmannanshire</b>																
Schools community programme																
Develop programme for later engagement																
Deliver programme for later engagement																
<b>East Lothian</b>																
Multi-modal journey promotion programme																
Develop programme for later engagement																
Deliver programme for later engagement																
<b>Falkirk</b>																
Build capacity to deliver change																
Deliver programme for change																
Define priorities for later engagement																
Deliver programme for later engagement																
<b>Fife</b>																
Develop and deliver programme for Leven																
Sustain programmes for Leven																
Develop and deliver programme for priority schools/ higher education institutions																
Sustain programmes for priority schools/ higher education institutions																
Define priorities for later engagement																
Develop programme for later engagement																
Deliver programme for later engagement																
<b>Midlothian</b>																
Develop programme for engagement																
Deliver programme for engagement																
Define priorities for later engagement																
Deliver programme for later engagement																
<b>Scottish Borders</b>																
Hawick programme: develop																
Hawick programme: deliver																
Hawick programme: legacy actions to sustain																
Define priorities for later engagement																
Develop programme for later engagement																
Deliver programme for later engagement																
<b>West Lothian</b>																
Build capacity to deliver change																
Deliver programme for change																
Define priorities for later engagement																
Deliver programme for later engagement																

## 5. Monitoring and evaluation

### 5.1 Introduction

Effective monitoring and evaluation (M&E) of P&P is essential to:

1. Demonstrate to SEStran, funders and other stakeholders that the programme is delivering on its objectives
2. Assess the value of project delivery, and enable refinement of the programme towards higher-value delivery
3. Ensure improvement is being made against the objectives and outcomes of the regional plan and by individual projects year on year

### 5.2 Key Performance Indicators and Outcome Monitoring

Table 6 below sets out how the performance of P&P will be monitored and evaluated against its priorities.



Table 6. Key Performance Indicators and Outcome Monitoring

Priority intervention	Outcomes	Key performance indicators	Monitoring method	Data source (Existing = E, Requires new data = N)	Estimated cost of data collection (low=<10k, medium=10 -50k, high=>50k)	Frequency of data collection	Responsibility
Intensive programmes of delivery in targeted communities	Increase the number of journeys by active and sustainable modes in and around the target community	Proportion of journeys in and around target community made by sustainable modes to be greater than the proportion on their existing equivalent journeys	Monitoring of changes in walking and cycling count data	E/N (existing counts in places, but may need to be complemented by new)	High	Annual	SEStran to lead, with support from Local Authorities where appropriate
			Monitoring of changes in public transport patronage levels	E	Low	Annual (or in line with operator reporting)	Data already collected by operators (though details may not be made available); SEStran to evaluate
	Reduce number of short trips being made by car	Traffic levels in the target community to be lower than existing levels	Self-completion surveys of people that live in the vicinity of the town/community (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Improve perceptions of accessibility to local goods/services, education and employment by non-car modes	For residents to have more positive perceptions of accessibility to local goods/services, education and employment by non-car modes	Self-completion surveys of people that live in the vicinity of the town/community (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Increase the amount of walking, wheeling and cycling for physical activity	Proportion of people participating in walking, wheeling and cycling to be greater than existing levels	Monitoring of changes in walking and cycling count data Self-completion surveys of people that live in the vicinity of the town/community (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Enable people that were previously excluded from using active or sustainable modes for some journeys to do so	Increase in the proportion of people using sustainable modes who previously did not Increased diversity among users of sustainable modes	Self-completion surveys of people that live in the vicinity of the town/community (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate

Priority intervention	Outcomes	Key performance indicators	Monitoring method	Data source (Existing = E, Requires new data = N)	Estimated cost of data collection (low=<10k, medium=10 -50k, high=>50k)	Frequency of data collection	Responsibility
<b>Intensive programmes of delivery in school catchment areas</b>	Increase the number of journeys made by young people by active and sustainable modes to school and for other commonly -made journeys	Proportion of journeys to/from school made by sustainable modes to be greater than the proportion on their existing equivalent journeys	Monitoring of Hands Up Survey data	E	Low	Annual (in line with Sustrans reporting)	Data already collected by Sustrans; SEStran to evaluate
	Increase the number of journeys made by parents/carers by active and sustainable modes to school and for other commonly -made journeys	Proportion of journeys in the school catchment area made by sustainable modes to be greater than the proportion on their existing equivalent journeys	Self-completion surveys of parents/carers (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Reduce the number of journeys made to school and for other commonly -made journeys by car	Traffic levels in the school catchment area to be lower than existing levels	Self-completion surveys of parents/carers (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Improve perceptions of accessibility to education by non-car modes	For young people and their parents/carers to have more positive perceptions of accessibility to education by non-car modes	Self-completion surveys of pupils, parents/carers (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Enable people that were previously excluded from using active or sustainable modes for some journeys to do so	Increase in the proportion of people using sustainable modes who previously did not  Increased diversity among users of sustainable modes	Self-completion surveys of people that live in the school catchment area (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
<b>Focusing on sites that are major trip generators</b>	Reduce the number of journeys made by car from or to major trip generators	Traffic levels within and in vicinity of the site to be lower than existing levels	Self-completion surveys of people that live in the vicinity of the site (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Increase the number of journeys made by active and sustainable modes from or to major trip generators	Proportion of journeys to/from major trip generators made by sustainable modes to be greater than the proportion on their existing equivalent journeys	Monitoring of changes in walking and cycling count data	E/N (existing counts in places, but may need to be complemented by new)	High	Annual	SEStran to lead, with support from Local Authorities where appropriate
			Monitoring of changes in public transport patronage levels	E	Low	Annual (or in line with	Data already collected by operators (though details



Priority intervention	Outcomes	Key performance indicators	Monitoring method	Data source (Existing = E, Requires new data = N)	Estimated cost of data collection (low=<10k, medium=10 -50k, high=>50k)	Frequency of data collection	Responsibility
						operator reporting)	may not be made available); SEStran to evaluate
	Improve perceptions of accessibility from or to major trip generators by non-car modes	For people that live in the vicinity of the site to have more positive perceptions of accessibility to major trip generators by non-car modes	Self-completion surveys of people that live in the vicinity of the site (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Enable people that were previously excluded from using active or sustainable modes for some journeys to do so	Increase in the proportion of people using sustainable modes who previously did not Increased diversity among users of sustainable modes	Self-completion surveys of people that are resident in or travel to major trip generators (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
<b>Focusing on areas with significant new active travel infrastructure or improved public transport services</b>	Increase the use of the new infrastructure or services	Usage of new active travel routes or improved public transport services to be greater than current usage	Monitoring of changes in walking and cycling count data	E/N (existing counts in places, but may need to be complemented by new)	High	Annual	SEStran to lead, with support from Local Authorities where appropriate
			Monitoring of changes in public transport patronage levels	E	Low	Annual (or in line with operator reporting)	Data already collected by operators (though details may not be made available); SEStran to evaluate
	Improve perceptions of active travel or public transport	For residents to have more positive perceptions of active travel or public transport	Self-completion surveys of residents, ensuring a range of demographics across the region are captured (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Enable people that were previously excluded from using active or sustainable modes for some journeys to do so	Increase in the proportion of people using sustainable modes who previously did not Increased diversity among users of sustainable modes	Self-completion surveys of people that live in the vicinity of the new infrastructure or services (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate

Priority intervention	Outcomes	Key performance indicators	Monitoring method	Data source (Existing = E, Requires new data = N)	Estimated cost of data collection (low=<10k, medium=10 -50k, high=>50k)	Frequency of data collection	Responsibility
<b>Programmes to promote opportunities for multi-modal journeys</b>	Improve perceptions of accessibility to public transport	For residents to have more positive perceptions of accessibility to public transport	Self-completion surveys of residents, ensuring a range of demographics across the region are captured  (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Increase the use of public transport	Proportion of journeys made by public transport across the region to be greater than existing levels	Monitoring of changes in public transport patronage levels	E	Low	Annual (or in line with operator reporting)	Data already collected by operators (though details may not be made available); SEStran to evaluate
	Improve perceptions of transport integration	For residents to have more positive perceptions of transport integration	Self-completion surveys of residents, ensuring a range of demographics across the region are captured  (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Reduce the number of medium-length and longer trips being made by car	Proportion of journeys made by car across the region to be lower than existing levels	Self-completion surveys of residents, ensuring a range of demographics across the region are captured  (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
	Enable people that were previously excluded from using active or sustainable modes for some journeys to do so	Increase in the proportion of people using sustainable modes who previously did not  Increased diversity among users of sustainable modes	Self-completion surveys of people that live in the target area  (Face-to-face surveys for people unable to self-complete)	N	Medium	Annual	SEStran to lead, with support from Local Authorities where appropriate
<b>Capacity building within Local Authorities and local partners</b>	Local Authorities are better able to establish and manage effective behavioural change projects	For Local Authorities to express positive views towards P&P and manage effective projects	Schedule regular meetings with Local Authorities	N	Low	Annual	SEStran
	Local partner organisations have increased willingness, capacity and skills to establish and implement effective behavioural change projects	For local partner organisations to actively engage with P&P and implement effective projects	Schedule regular meetings with partner organisations	N	Low	Annual	SEStran

PP will be evaluated at a programme level, but specific project-level M&E plans will also be developed, based on their specific objectives. These will include the stages and items listed in Table 7 below.

**Table 7. Project-level M&E**

M&E Stage	Items to be monitored and reported
<b>Inputs</b>	<ul style="list-style-type: none"> <li>Financial investment by P&amp;P</li> <li>Financial investment by others</li> <li>Time input by SEStran</li> <li>Time input by Local Authority officers</li> <li>Time input by others</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>Number of people directly engaged (e.g. through events), and by what processes</li> <li>Number of people indirectly engaged (e.g. through marketing), and by what means</li> <li>Descriptions of infrastructure delivered</li> <li>Descriptions of any other outputs</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>Changes in the use of walking, wheeling, cycling and use of other sustainable transport modes, as a result of P&amp;P – quantitative research on usage, supported by qualitative research as to the reasons why usage has changed</li> <li>Changed awareness of the benefits of active and sustainable travel, as a result of PP – qualitative research into awareness of and attitudes to active and sustainable transport choices</li> <li>Work in many of the region’s communities (deprived areas, schools, strategic development sites, and areas with new infrastructure), plus build capacity and capability for further change – qualitative research into where change has occurred and into capacity/ capability amongst partners (including Local Authorities and community-based organisations)</li> </ul>
<b>Process</b>	<ul style="list-style-type: none"> <li>Financial spend cf. allocation</li> <li>Project deliverers’ opinions on lessons learned</li> <li>Stakeholders’ opinions of the effectiveness of project planning and delivery</li> <li>Participant satisfaction</li> </ul>

Each P&P project will be evaluated annually, with priority to data collection and analysis in autumn, so that findings are available to enable reshaping of projects and/ or overarching programme for the following funding year.

### 5.3 Baseline Monitoring

Establishing a robust baseline from which to assess the impacts of P&P will be challenging, as not all of the required mechanisms for data collection (e.g. traffic and walking/ cycling counters at priority locations) are in place yet. This will make it difficult to obtain accurate and comprehensive baseline data on current travel behaviours and patterns.

To mitigate the risks of an unreliable baseline being available, the following approaches will be used to collect baseline data:

- Conduct manual counts at priority locations to gather baseline data on walking, wheeling and cycling participation; mode share; and traffic levels;

- Self-completion and face-to-face surveys with participants at priority locations to collect baseline data on travel patterns, mode share, and attitudes towards active travel and public transport;
- Utilise existing data sources where possible, such as Census data, public transport patronage, household surveys, and health surveys, to supplement collected baseline data.

### 5.4 Reporting

SEStran will collate findings and publish an annual P&P M&E report, and complementary project reports; the latter of which can be used by Local Authorities to report local outputs. SEStran’s dashboard will be used as a data repository.

All data exchanged between Local Authorities, delivery organisations and SEStran will be collected, processed, stored and erased according to SEStran’s data management processes and to meet General Data Protection Regulations (GDPR) regulations.

### 5.5 Dissemination Plan

SEStran will publish annual P&P M&E reports on its website. All key decision makers, delivery partners and other stakeholders who have provided their contact details will be made aware of the availability of these reports, as will the general public through SEStran’s regular communications channels. This will help cement their support and/ or guide how lessons learned can be incorporated into future decision making.

## 6. Uncertainty and risk

This Delivery Plan for P&P is intended to guide investment by SEStran and partners towards high-value behaviour change projects which reflect the diversity and geographic spread of the region.

It sets some initial priorities for that investment, and how work will be monitored and evaluated in order that its costs and effects can be understood. The plan recognises that there is much uncertainty surrounding the programme, so that it will need to be agile to respond to as yet unforeseen circumstances. The key risks and uncertainties are provided in Table 8.

SEStran will respond to the risks associated with funding and with other external uncertainties through maintenance of a risk register for the P&P programme and subsequently for each project that the programme supports. It will mitigate risks where possible and implement risk management actions when appropriate. This will be supported by an annual review of the Plan, so of the programme and of each project it supports, in order that future risks can be identified and mitigated.

Table 8. Risks and Uncertainties

Risk/Uncertainty	Likelihood	Impact	Mitigation
<b>Changes to funding, or funders' requirements, for PP, Local Authority People &amp; Place or other behavioural change programmes</b>			
Cessation of funding streams	Medium	High	Engage with Transport Scotland/ policymakers and raise public awareness to advocate for continuation of funding.
Changes to funding amounts, including of capital/revenue split requirements	High	High	Prioritise essential activities and identify areas where costs can be reduced. Maintain regular communication with Transport Scotland to stay informed about potential changes and adjust programme accordingly.
Changes to funding objectives or conditions	Medium	High	Ensure that delivery priorities are closely aligned with Transport Scotland policy objectives to reduce the risk of misalignment and minimise the need for significant changes to priorities. Stay updated on funding conditions and promptly adapt programme where necessary.
Changes to monitoring/evaluation and/or reporting requirements	Medium	Medium	Stay updated on any changes to M&E/reporting requirements and adapt accordingly.
Annual funding rounds and delays to funding awards reduces ability for long-term planning and delivery partner interest/capacity	High	High	Early and continued dialogue with delivery partners who are committed to P&P. Plan for phased implementation of interventions, allowing for adjustments based on availability of funds.
<b>Other external uncertainties</b>			
Changes to the capacity and/or capability of Local Authorities and other partners to plan and/or deliver and/or support P&P projects	Medium	High	Consider resource sharing where capable local authorities/partners can support those with less capacity, including sharing expertise. Identify gaps in capacity and capability early and address these proactively.
Changes to the delivery programmes of related projects (e.g. of infrastructure improvements) hamper effectiveness of P&P projects	Medium	High	Early and continued communication with local authorities/delivery partners to stay informed about progress and any potential changes to infrastructure improvements.
<b>P&amp;P delivery risks</b>			
There is too little innovation in programme design (so delivery is stale)	Medium	Medium	Use robust M&E to assess the impact of interventions. Seek feedback from stakeholders to identify areas where innovation is needed and gather new ideas. Use evidence from successful innovations elsewhere to inform new interventions.
There is too much innovation in programme design (so limited benefits achieved)	Medium	Medium	Ensure new ideas are tested by evidence. Implement small-scale interventions to test innovative ideas before delivering them more widely. Use robust M&E to assess the impact of innovative approaches and ensure they deliver real benefits. Communicate with stakeholders to ensure new ideas align with their needs.
Lack of data on effectiveness of projects hampers decision making and/or ability to evidence success	High	High	Invest in comprehensive data collection systems to gather the required information on project outcomes and enable effective M&E. Consider partnering with other organisations to share data.
SEStran, Local Authorities and other delivery partners do not properly coordinate P&P and Local Authority People & Place projects, or other complementary projects, such that delivery is inefficient	Medium	High	Ensure all partners are fully aware of their responsibilities to avoid duplication of efforts and ensure efficient use of resources. Establish regular communication channels for project updates, addressing challenges, and ensuring alignment of efforts.

## 7. Integrated Impact Assessment

An Integrated Impact Assessment (IIA) of P&P has been undertaken to identify the benefits/ opportunities, potential impacts and proposed mitigation measures to reduce potential negative impacts where appropriate. This section provides an overview of the process and outcomes of the IIA; the complete assessment is contained in Appendix C.

An IIA approach was chosen due to the overlapping nature of the assessments required for P&P and the person categories under them. As such, this IIA consists of a combined framework of the following assessments:

- Equalities Impact Assessment (EqIA)
- Children’s Rights and Wellbeing Impact Assessment (CRWIA) Fairer Scotland Duty Assessment (FSDA)
- Health Inequality Impact Assessment (HIIA)

This approach has the benefit of enabling effective analysis of the impacts on all relevant person categories whilst avoiding duplication in assessment. The person categories used in the assessment are:

- Age:
  - Children under 12
  - Children aged 12 – 18
  - Young people aged 18 – 25
  - Older people aged 65 and above
- Disability:
  - People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid)
  - People who are blind/ have visual impairment
  - People who are Deaf/ BSL user/ have hearing impairment
  - People with a learning disability or cognitive impairment (such as dementia)
  - People who are neurodivergent (such as autism, ADHD, dyslexia)
- Gender Reassignment
- Marriage and Civil Partnership
- Pregnancy and Maternity
- Race
- Religion or Belief
- Sex
- Sexual Orientation
- Socio-Economic Disadvantage

The assessment has demonstrated that P&P will provide positive impacts for many groups of people across the region.

It has the potential to deliver broad-ranging benefits, by creating an active and sustainable travel behaviour change programme that is accessible, equitable, and effective in encouraging many more people to participate in a healthier and more sustainable way of travelling.

However there are some risks to realising these benefits, highlighting that projects should promote use of active and sustainable transport options that are of good quality, and that effort needs to be made to ensure that activities do not inadvertently exclude certain individuals due to age, faith, race, gender, income or other factors. SEStran will continue to work together with its Local Authority and other partners to identify and mitigate these risks/ impacts as P&P projects are brought forward, cognisant of the following factors:

- Working closely with the community will help further understanding of the needs and barriers faced by different demographics. This includes people with disabilities, older people, children and young people, people from ethnic minority groups, low-income residents and those with childcare responsibilities
- Promoting a variety of active and sustainable travel options like walking, wheeling, cycling and public transport will cater to different abilities and preferences
- Providing flexible and accessible activity and support offers will encourage participation from a wider range of individuals
- Offering materials in a variety of formats, including online content, printed brochures, easy-read versions, audio recordings and British Sign Language videos, as well as providing materials in multiple languages or offering access to translation services, will ensure materials are accessible for all
- Involving the community in design and implementation ensures it will reflect local needs and will help foster a sense of ownership. Showcasing a variety of people from different backgrounds using active and sustainable travel in programme materials will inspire and motivate others
- All organisations that work with or come into contact with children should have safeguarding policies and procedures to ensure that every child, regardless of their age, disability, gender reassignment, race, religion or belief, sex or sexual orientation, has a right to equal protection from harms
- Collecting data on programme participation disaggregated by demographics to identify any unintended exclusion and ensure the programme reaches everyone
- Regularly monitoring and evaluating the programme's effectiveness for different groups and make adjustments as needed to promote continuous improvement and inclusivity



## Appendix A. Local Authority Local Transport Strategies and Active Travel Strategies

### City of Edinburgh

[City Mobility Plan 2021-2030](#)

[Active Travel Action Plan 2030](#)

[Behaviour Change Programme Delivery Plan](#)

[City Plan 2030](#)

### Clackmannanshire

At the time of publication, Clackmannanshire's Local Transport Strategy, Active Travel Strategy, and Local Development Plan are in development.

### East Lothian

[Local Transport Strategy 2018-2024](#)

[Active Travel Improvement Plan 2018-2024](#)

### Fife

[Local Transport Strategy 2023-2033](#)

### Falkirk Council

[Local Transport Strategy 2023-2033](#)

[Active Travel Strategy](#)

[Local Development Plan 2](#)

### Midlothian

At the time of publication, Midlothian's Local Transport Strategy and Local Development Plan are in development.

[Active Travel Strategy 2024-2034](#)

### Scottish Borders

At the time of publication Scottish Borders' Local Transport Strategy and Active Travel Strategy are in development.

[Local Development Plan – Volume 1](#)

[Local Development Plan - Volume 2](#)

### West Lothian

At the time of publication, West Lothian's Local Transport Strategy and Local Development Plan are in development.

[Active Travel Strategy 2024-2029](#)

## Appendix B. Evidence of success in schools, workplaces communities

This appendix summarises some of the evidence of the effectiveness of travel behaviour change projects. The evidence is presented for each of the three target audience groups for P&P projects (schools/ young people, workplaces and communities) in turn.

### Schools and young people

Research for the Department for Transport on the impact of School Travel Plans in English schools<sup>12</sup> showed positive results. Among 30 case study schools, there was an average reduction in total car use by 23%. Most schools saw an increase in walking, and cycling grew by over a quarter on average, resulting in 10% of all pupils cycling to school. Additional benefits included improved safety, reduced congestion, better attendance and punctuality, and increased alertness and readiness to learn, as well as benefits for pupils' personal development and the wider community.

The study found that successful school travel plans typically implement a variety of complementary interventions and have mechanisms in place to ensure they are sustained over time; for example, ongoing publicity and information, new infrastructure and safety measures, staff enthusiasm, and embedding travel work within school frameworks. It was also acknowledged that the success of school travel plans is dependent on various factors, such as the school's characteristics and catchment area (including crime rates and car ownership levels), the average distance between pupils' homes and the school, and the level of marketing and publicity efforts.

Department for Transport research on the impact and perceptions of cycle training (particularly Bikeability) in English schools also revealed positive outcomes<sup>13</sup>. Surveys indicated that 93% of children who participated felt more confident riding their bikes in general, and 86% felt more confident riding on the road. Parents also expressed positive views, with 98% saying they were satisfied with the Bikeability scheme and 93% feeling it had a positive impact on their child's safety when cycling on the road.

Similarly, Cycling Scotland's research on Bikeability showed encouraging results<sup>14</sup>. Interviews from their 2016 Give Everyone Cycle Space campaign evaluation found that nearly half (45%) of children cycled more frequently and 36% cycled to school more after Bikeability training. Bikeability training was also found to enhance children's personal development by encouraging greater independence and improving social skills, with 38% of children cycling more on their own and 41% cycling more with their friends.

Sustrans' I-Bike programme also demonstrated success. Data from the 2022-23 academic year showed that active travel levels in I-Bike schools were 8.4 percentage points higher than the national average<sup>15</sup>.

Moreover, School Camps delivered by Cycling Scotland, which task pupils with developing projects to promote cycling in their schools and include initiatives such as bike maintenance, first aid, and cycle training, found that 72% of participants said they would cycle more frequently as a result<sup>16</sup>. Upon returning

to their schools, pupils are encouraged to implement their project ideas and participate in broader activities, such as led rides.

Surveys conducted by Living Streets indicate that their year-round Walk Once a Week (WOW) school challenge typically results in a 23% increase in the number of children walking to school and a 30% reduction in car journeys<sup>17</sup>. A 2023 evaluation in Scotland<sup>18</sup> found that walking mode share is between 5 and 9 percentage points higher in WOW participating schools compared to non-WOW schools, and active travel levels are between 12 and 20 percentage points higher.

Living Streets' Walk to School week has also shown positive results. A 2013 evaluation in Scotland<sup>19</sup> found that the percentage of children travelling to school actively (as reported by parents) increased from 81% to 89%. The campaign also benefitted parents and other family members: 22% walked more than previously, 18% spent more time with family, 15% were encouraged to walk more in the future, and 15% became more aware of the benefits of walking. The most significant impact was on children who were previously driven to school, as many opted to be dropped off further away so they could walk the rest of the journey.

### Workplaces

A study analysing 20 case studies of UK workplace travel plans<sup>20</sup> found that, on average, the plans nearly doubled the proportion of staff commuting by walking, cycling and public transport. The highest levels recorded were 23% of staff walking, 21% cycling, and 53% using public transport. Employers also achieved an average reduction of 18% in the proportion of car commuting journeys.

The study also found that successful workplace travel plans often include a combination of complementary measures, such as improved cycling facilities, public transport incentives, and flexible working arrangements. Additionally, plans benefit from tailored approaches and from considering the specific needs and context of each workplace.

As part of the Department for Transport's Walk To scheme, Living Streets has supported 95 workplaces, including council offices, universities, hospitals, and private sector companies, reaching an average of 1,300 employees per year<sup>21</sup>. The interventions delivered include promotional campaigns, walking pledge events, led walks, walk leader training sessions, and one-to-one walking advice sessions. Participant surveys found that 59% regularly meet their walking pledge and 72% now walk more than before, with 19% walking a lot more and 53% walking a bit more. On average, those who increased their walking credited about half of this change to Living Street activities.

Similarly, a trial involving 295 employees from three workplaces in Glasgow<sup>22</sup> found that the intervention group had achieved twice the increase in walking compared to the control group after six months, and 25% of the intervention group were regularly walking to work one year later.

Workplace challenges have also shown positive results. A follow-up survey conducted three months after nine workplace challenges delivered by Cycling UK<sup>23</sup>, which took the form of a competition between

<sup>12</sup> Making School Travel Plans Work: Effects, benefits and success factors at English schools, S Cairns and C Newson, 2003, [Making school travel plans work: effects, benefits and success factors at English schools](#)

<sup>13</sup> Evaluation of the Impact and Perceptions of Cycle Training, Department for Transport, 2010

<sup>14</sup> Give Everyone Cycle Space Evaluation, Cycling Scotland, 2016

<sup>15</sup> Impact of I-Bike, Sustrans, 2023, [Impact of I-Bike](#)

<sup>16</sup> Tackling the School Run Research Study, Scottish Government, 2016, [Scottish Government Tackling the School Run Research Study](#)

<sup>17</sup> WOW – the walk to school challenge, Living Streets, [WOW – the walk to school challenge](#)

<sup>18</sup> Evaluation of School Travel Behaviour Change Programme, Living Streets, DHC, 2023, [Evaluation of School Travel Behaviour Change Programme](#)

<sup>19</sup> Walk to School Evaluation, Living Streets, 2013

<sup>20</sup> Understanding successful workplace travel initiatives in the UK, S Cairns, C Newson, and A Davis, 2010

<sup>21</sup> Promoting walking to work, Department for Transport, 2020, [Promoting walking to work - Case study - GOV.UK](#)

<sup>22</sup> "Walk in to Work Out": a randomised controlled trial of a self-help intervention to promote active commuting, N Mutrie et al, ["Walk in to Work Out": a randomised controlled trial of a self-help intervention to promote active commuting | Journal of Epidemiology & Community Health](#)

<sup>23</sup> Programmes to promote cycling – evidence for NICE from CTC, CTC, <https://www.nice.org.uk/guidance/ph41/evidence/expert-testimony-3-ctc-pdf430220125>

different workplaces and departments to see how many staff members could be encouraged to ride a bike, found that 40% of previous 'non-cyclists' were cycling at least once a week, 43% of occasional cyclists (those who cycled once a month) were cycling regularly (at least twice a week), and 12% of people who primarily commuted by car had switched to cycling.

### Communities

From 2004 to 2009, Darlington, Peterborough and Worcester Sustainable Travel Towns (STTs) working in partnership with their communities, explored the effectiveness of Smarter Choices measures to influence travel behaviours in their areas in favour of more sustainable modes. Interventions were packages of measures tailored to each local area, comprising both 'soft' measures such as marketing and information to encourage people to use sustainable transport modes, and 'hard' measures such as improvements to infrastructure and services.

Soft measures implemented by the STTs included personal travel planning, travel awareness campaigns, promotion of walking and cycling, and public transport marketing and information. Hard measures included cycle parking facilities, cycle lanes and signage, traffic management improvements (such as better crossings and dropped kerbs), pedestrianisation of the town centre (in Darlington), bus service improvements, including more frequent buses and real-time information, and bus stop improvements (including new bus shelters, better lighting, an express services to and from the park and ride).

Measured outcomes from the STTs compared with control group towns without the programme included reductions in the number of car trips and the amount of traffic and increases in cycling and bus trips<sup>24</sup>.

Sustrans' Personalised Travel Planning project, Travel Smart, has, on average, delivered an 11.6% reduction in car mileage, a 15% increase in walking trips, and a 35% increase in cycling trips across targeted areas<sup>25</sup>. Personalised Travel Planning has been shown to be more effective when targeted at people in transitional points in their lives (for example, moving house, changing job, or going to university), as people tend to be more receptive to change at these stages. It has also been shown that Personalised Travel Planning is more effective when delivered at the same time as infrastructure improvements, as well as in urban areas, where there are typically more modal options for journeys.

Cycle training programmes delivered to adults in local communities can be equally as effective as those delivered in workplace and school settings. Data from a Department of Health evidence review<sup>26</sup> found that 60% of people increase their cycling significantly after training, with their main journey purposes being commuting and leisure. An early pilot project in Bristol suggested that 25% of people reduced their car use following the training. Cycle maintenance courses have also been found to increase cycling, with 81% of people attending courses cycling more afterwards.

An evaluation of 750 participants from the Walking the Way to Health initiative in England and the Paths to Health Project in Scotland<sup>27</sup> found that led health service walks can be successful in increasing physical activity and encouraging walking for other trips. Analysis found that 65% of participants were meeting current recommended levels of physical activity just from walking, with the amount of leisure walking significantly contributing to overall physical activity levels. Furthermore, after 12 months, 17% of

participants reported doing more everyday walking around their own neighbourhood and 9% walked more to the shops.

Social prescribing is another method for increasing physical activity in communities. A US study<sup>28</sup> found that the loan of step counters to patients at GPs can be an effective way of encouraging walking and improving health. Data from the six-week programme found that 71% of users said they walked more after six weeks, and participants were walking, on average, 1500 steps a day more by the end of the programme.

Local walking information packs have also been shown to increase physical activity, despite being a low-cost intervention. The independent Doorstep Walks initiative in Salisbury aimed to encourage home-based brisk walks and increase people's physical activity; packs detailing ten local walks in the area and information on the benefits of physical activity were issued through public outlets, including GPs<sup>29</sup>. An 18-month follow-up questionnaire found that 41% of people said they did more everyday walking in their local neighbourhood as a result of the walking packs, and one in six people reported that they continue to use the resource provided<sup>30</sup>.

Access to public transport is seen as a strong determinant of walking for transport. A literature review by Transport Scotland<sup>31</sup> found residents with 30 or more bus stops in a 1.6km radius of their homes were twice as likely to walk for transport as those who had 0-14 bus stops, and having a train station within a 1.6km radius increased the odds of walking by 50%.

<sup>24</sup> The Effects of Smarter Choice Programmes in the Sustainable Travel Towns: Research Report, Department for Transport, 2010, [The Effects of Smarter Choice Programmes in the Sustainable Travel Towns: Research Report](#)

<sup>25</sup> Soft measures – hard facts, the value for money of transport measures which change travel behaviour, a Review of the Evidence, Department for Health, 2011, [DoH\\_Soft\\_Measures\\_Hard\\_Facts.pdf](#)

<sup>26</sup> Soft measures – hard facts, the value for money of transport measures which change travel behaviour, a Review of the Evidence, Department for Health, 2011, [DoH\\_Soft\\_Measures\\_Hard\\_Facts.pdf](#)

<sup>27</sup> Evaluation of changes to physical activity amongst people who attend the walking the way to health initiative, J Dawson et al, 2006, [report](#)

<sup>28</sup> Using pedometers to increase physical activity and improve health: a systematic review, DM Bravata et al, 2007

<sup>29</sup> Doorstep walks, Travel West, 2010, [6.1: Doorstep walks - WEST](#)

<sup>30</sup> Sustainability and evidence of success: An 18-month follow-up study of the Doorstep Walks initiative, M Vernon, MJ Brewin, and D Vernon, 2002

<sup>31</sup> Best practice in active travel and its associated benefits, Transport Scotland, [Best practice in active travel and its associated benefits](#)



## Appendix C. Integrated Impact Assessment

### C.1 Introduction

This document presents the findings of the Integrated Impact Assessment (IIA) of P&P. The assessment identifies the benefits/ opportunities, potential impacts and proposed mitigation measures to reduce potential negative impacts where appropriate.

SEStran’s P&P will:

- Increase the proportion of active and sustainable journeys in the region
- Increase awareness of the benefits of active and sustainable travel to encourage future behaviour change
- Increase the use of active and sustainable travel modes among underrepresented groups in the region who might face additional barriers
- Collaborate with local authorities and third-sector partners to strengthen capacity and capability in active and sustainable travel

Its focus will be on travel for utility journeys, though changed travel habits for leisure may also be supported where this can be demonstrated to contribute to regional health and/ or economic development objectives.

SEStran’s People and Place programme covers four themes:

- Schools and young people
- Workplaces
- Developing accessible and inclusive communities
- Capacity and capability building within the public sector and community-based organisations

And comprises six priority intervention types:

- Intensive programmes of delivery in targeted communities
- Intensive programmes of delivery in school catchment areas
- Focusing on sites that are major trip generators
- Focusing on areas with significant new active travel infrastructure or improved public transport services
- Programmes to promote opportunities for multi-modal journeys
- Capacity and capability building within Local Authorities and local partners

The IIA will consider the likely impacts and propose mitigation measures for each of the six priority intervention types.

### C.2 Assessment Framework

The purpose of the IIA is to meet legal requirements related to The Equalities Act 2010 (Specific Duties) (Scotland) 2012 (specifically the Public Sector Equality Duty), the Fairer Scotland Duty, and the Children and Young People (Scotland) Act 2014. An IIA method was chosen due to the overlapping nature of the assessments and the person categories under them. As such, this IIA consists of a combined framework of the following assessments:

- Equalities Impact Assessment (EqIA)
- Children’s Rights and Wellbeing Impact Assessment (CRWIA)
- Fairer Scotland Duty Assessment (FSDA)
- Health Inequality Impact Assessment (HIIA)

This approach has the benefit of enabling effective analysis of the impacts on all relevant person categories whilst avoiding duplication in assessment. Table C1 shows the person categories considered in this IIA and the individual assessments each person category is relevant to.

**Table C9: Person categories and relevant assessments**

Person category / included within impact assessment category	Equalities Impact Assessment (EqIA)	Children's Rights and Wellbeing Impact Assessment (CRWIA)	Fairer Scotland Duty Assessment (FSDA)	Health Inequality Impact Assessment (HIIA)
Age	<input type="checkbox"/>			<input type="checkbox"/>
Children under 12	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Children aged 12 – 18	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Young people aged 18 – 25	<input type="checkbox"/>			<input type="checkbox"/>
Older people aged 65 and above	<input type="checkbox"/>			<input type="checkbox"/>
Disability	<input type="checkbox"/>			<input type="checkbox"/>
People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid)	<input type="checkbox"/>			<input type="checkbox"/>

People who are blind/have visual impairment	<input checked="" type="checkbox"/>			<input type="checkbox"/>
People who are Deaf/BSL user/have hearing impairment	<input type="checkbox"/>			<input type="checkbox"/>
People with a learning disability or cognitive impairment (such as dementia)	<input type="checkbox"/>			<input type="checkbox"/>
People who are neurodivergent (such as autism, ADHD, dyslexia)	<input type="checkbox"/>			<input type="checkbox"/>
Gender Reassignment	<input type="checkbox"/>			<input type="checkbox"/>
Marriage and Civil Partnership	<input type="checkbox"/>			<input type="checkbox"/>
Pregnancy and Maternity	<input type="checkbox"/>			<input type="checkbox"/>
Race	<input type="checkbox"/>			<input type="checkbox"/>
Religion or Belief	<input type="checkbox"/>			<input type="checkbox"/>
Sex	<input type="checkbox"/>			<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>			<input type="checkbox"/>
Socio-Economic Disadvantage (people without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)			<input type="checkbox"/>	<input type="checkbox"/>

### C.3 Evidence Base

A literature review has been undertaken, utilising public survey data, government policy documents, the SEStran Regional Transport Strategy and academic sources to inform the identification of potential differential impacts on protected characteristic groups.

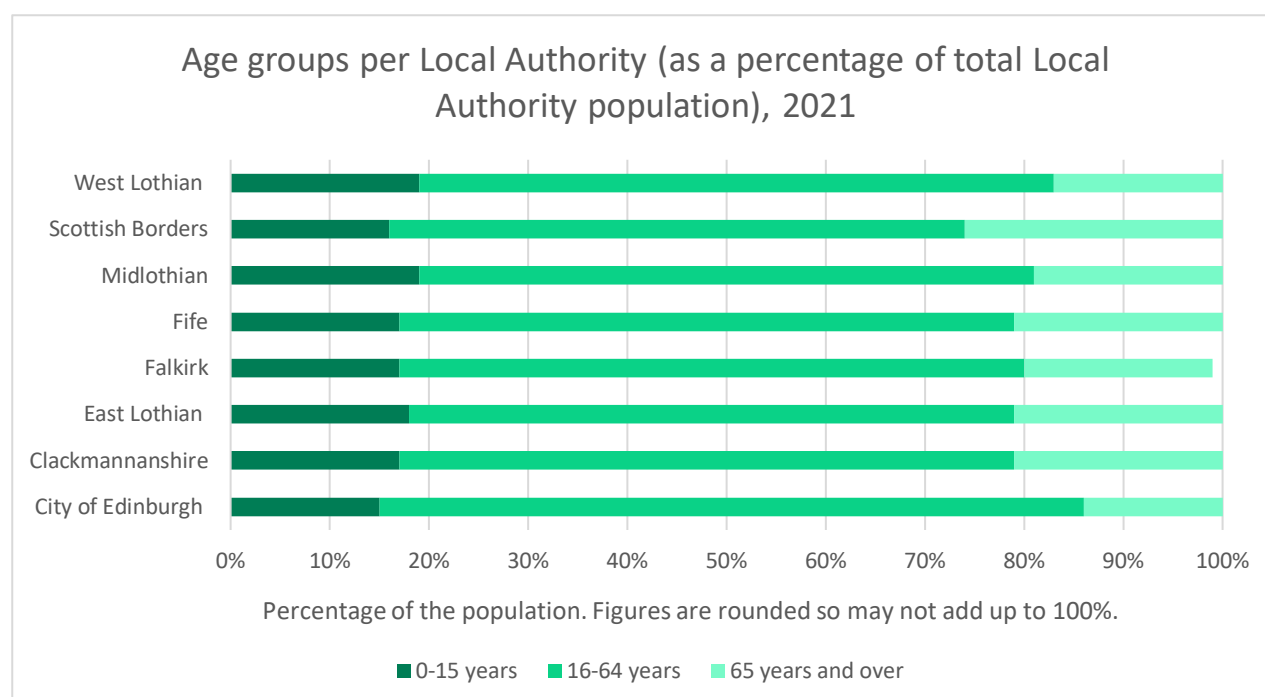
#### Population statistics - SEStran Region

The SEStran region covers 8,400km<sup>2</sup>, which is just over 10% of Scotland’s landmass. It is hugely diverse and includes areas which fall into every one of the Scottish Government’s six-fold urban-rural classification. The total population of the SEStran area was estimated as 1,609,070 in 2019. The majority of the population is concentrated in the centre of the SEStran area, with a large, sparsely populated rural area to the south, particularly the remote rural areas in the Scottish Borders and East Lothian. The greatest concentration of population is within the City of Edinburgh, which accounts for approximately 33% of the total SEStran region’s population.

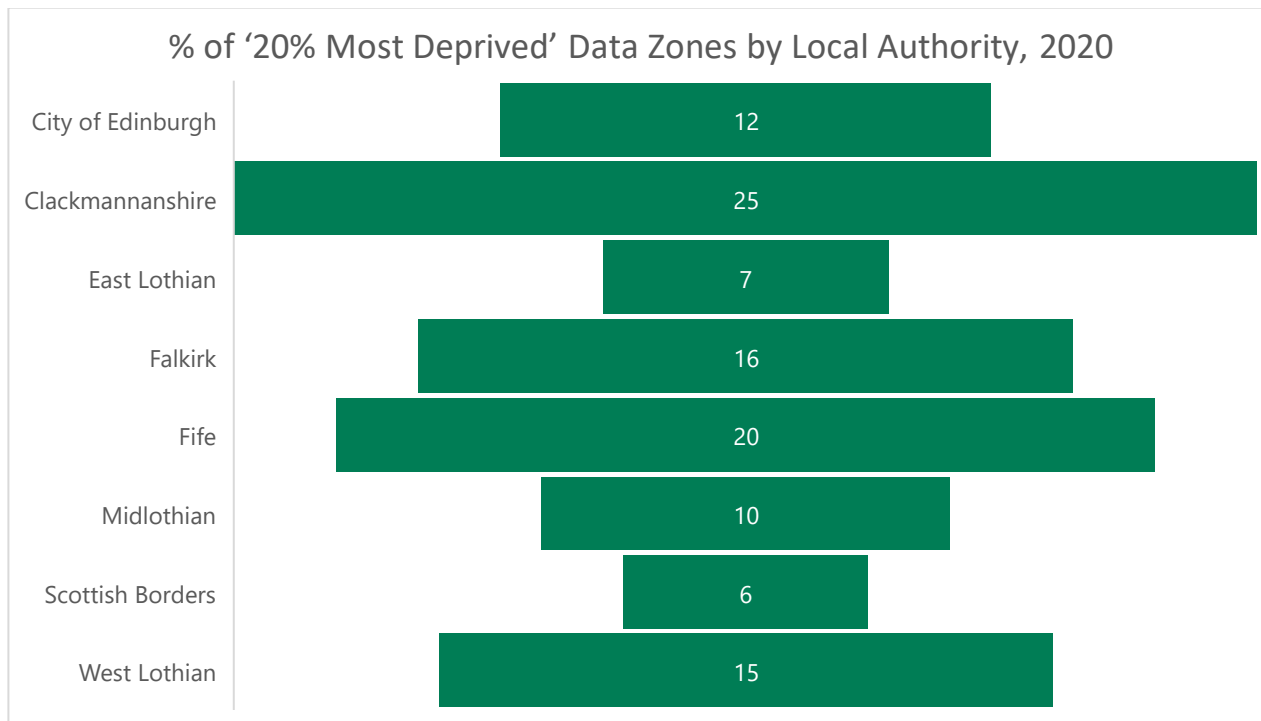
The population within the SEStran region is ageing, with the number of people in the region aged 65 or more increasing by 23.6% between 2009-2019. West Lothian has seen the highest growth in the elderly population (34.3%).

There are variations in levels of employment across the region, although only Clackmannanshire, Falkirk and Fife have an employment rate below the national average. All local authorities have experienced a growth in their employment rates since 2009, with the highest growth being in West Lothian.

Levels of walking as a means of transport and as a way to keep fit or for exercise are higher in the SEStran region than the national average. This suggests higher levels of physical activity, which is beneficial for health, and is further reflected in higher life expectancy rate, compared to the national average.



Source: NRS (2022) Mid-year population estimates Scotland 2021



Source: Scottish Government (2020) Scottish Index of Multiple Deprivation (SIMD20)

Table C10: Evidence

Person category	What is known currently about the experiences of people under this category?	Source
Age	The Scottish population is ageing and in 2020, there were an estimated one million Scotland residents aged sixty-five years or older. By 2040, this will rise to an estimated 1.4 million, or 25% of our population.	Scottish Health Survey, Scottish Government, 2022
	Scottish Borders has the highest percentage population of people aged 65 and over of all the authorities in the SEStran region.	
	Access to services, such as shops, post offices and healthcare centres, as well as visiting friends and relatives can be difficult for older people, particularly in rural areas. Older people who do not have access to their own car or who have may have lost the right to drive due to eyesight deterioration or other medical problems, are particularly vulnerable to social isolation in rural areas, where services, such as GP surgeries, are too far away to walk, and public transport options are limited.	A More Active Scotland: Scotland's Physical Activity Delivery Plan, Scottish Government, 2018
	Accessibility issues are more likely to affect older people than other age groups with some older people having limited mobility, hearing or vision impairments, difficulties in understanding information or accessing digital resources and difficulties in alighting to and from transport services or standing for long periods of time.	
	Walking is the most popular mode of travel across all age groups with 67% percent of adults saying they walked more than a quarter of a mile in the past 7 days, slightly higher than the proportion (64%) who said they drove at least once a week, and significantly higher than the proportion (25%) who use the bus at least once a week (Scottish Household Survey, 2019, reported in Scottish Transport Statistics no.39, 2020). Young adults were more likely to have walked to go somewhere (78%) compared with two-thirds of people aged 40-69 and 40% of those aged 80 or over.	Hands up Survey Scotland, Sustrans, 2020
	Data from a 2019 national attitude survey shows that walking participation may be lower amongst those who are 'age and health restricted'. However, a significant proportion still make walking trips, with 48% walking to local shops or services in the past month, compared to 63% of the total survey sample.	
	Interventions to improve the walking environment, such as unobstructed and well-maintained footpaths may be particularly important for those who are 'age and health restricted'. In response to the Travel and Transport in Scotland Survey (2020), older residents (55+ years old) were more dissatisfied than younger residents (16-24 years old) with road maintenance (77% vs 46%), pavement maintenance (62% vs 25%) and street cleaning (49% vs 30%). Older residents are more susceptible to safety risks associated with these transport features, where poor pavement maintenance could increase risks of injuries.	Department for Transport (DfT), National Travel Survey, 2014
	Walking and cycling are both low impact forms of physical activity that are encouraged across all age groups and may be particularly beneficial for those in older age groups who are unable to engage in more strenuous forms of physical activity.	National Records of Scotland, Census 2011: Release 3M-Detailed characteristics on Transport in Scotland, 2014
	Walking is the most popular mode of travel for children to school (52%, compared with 25% travelling by car or van, 19% travelling by bus and 2% cycling). Although this differs by age, with younger children more likely to walk to school than older children, who are more likely to travel by bus.	Transport Scotland, 2020d
	Child pedestrian casualties accounted for 44% of all pedestrian casualties across all age groups. The journey home from school in the afternoon has been found to have more risks than the journey to school in the morning, especially when walking or cycling. Safety concerns are also heightened for children and young people accessing public transport facilities, such as bus or rail stations, particularly when these are unstaffed or in remote locations.	Transport Scotland 2020c
Cycling as a means of transport is more common amongst younger people (age 16-19) than in any other age group, with the lowest levels of cycling seen amongst those age 50+ (Transport and Travel in Scotland, 2019). The provision of quality, segregated and maintained cycle paths is identified as the single biggest enabler of cycling in people aged 50-70, and indicators suggest e-bikes may have a significant role to play in facilitating increased levels of cycling in this age group (Centre for aging better. Exploring the barriers and enablers to active travel among 50-70 year olds).	Transport Scotland 2020c	
30% of older people (aged over 65) do not associate cycling as an activity for people like them, 18% do not cycle but would like to.		
Older people are more likely to use public transport for journeys in comparison to other age groups and there has been a 2% increase in the number of people aged 60+ in possession of a concessionary bus pass between 2009 and 2019.	Transport and travel in Scotland, 2019	

		<p>Mid-year population estimates Scotland 2021, NRS, 2022</p> <p>Scottish Household Survey, 2019, reported in Scottish Transport Statistics no.39, 2020</p> <p>Scottish Government, 2021 Health and social care strategy for older people: Consultation analysis, 2022</p> <p>Paths for all. National survey of attitudes and barriers to walking in Scotland</p> <p>Department for Transport. Active Travel Investment Models: Overview of evidence on increasing active travel, 2019</p> <p>UK Chief Medical Officers' physical activity guidelines,</p>
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		<p>Scottish Government, 2019</p> <p>Cycling for Everyone, Sustrans, 2020</p> <p>Travel and Transport Survey, Scottish Government, 2020</p>
<p><b>Disability</b></p> <p><b>People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid)</b></p> <p><b>People who are blind/have visual impairment</b></p> <p><b>People who are Deaf/BSL user/have hearing impairment</b></p> <p><b>People with a learning disability or cognitive impairment (such as dementia)</b></p> <p><b>People who are neurodivergent (such as autism, ADHD, dyslexia)</b></p>	<p>Around 24% of Scotland's population live with a long-term physical or mental health condition that limits their daily life. Yet, those with long-term limiting illnesses, including disabled, people often experience higher levels of inequality. In areas with a higher level of deprivation, more people live with a limiting condition. In the most deprived areas in Scotland, 33% of adults live with a limiting condition, while 15% of adults lived with a limiting condition in the least deprived areas. Only about 5% of disabled people of working age are in work compared to 80% of non-disabled people of working age. Employment rates vary greatly according to the type of impairment a person has. People with a mental health condition considered a disability have the lowest employment rate of all impairment categories (21%) and the employment rate for people with learning disabilities is 26%.</p> <p>Accessible transport is an important aspect of enabling disabled people to enjoy equal access to full citizenship. Disabled adults are more likely to use the bus than non-disabled adults (11% of journeys vs 7%). In terms of requiring affordable transport options, whilst the National Concessionary Travel Scheme is available to all those who qualify, disabled people are more likely to face transportation cost issues than non-disabled people.</p> <p>Disabled people can face several accessibility issues when using public transport services. These include steps or multiple stairs, lack of pre-journey and real time information, inaccessible transport information, lack of trained support staff, and lack of accessible connectivity between modes. Disabled people tend to have slightly less positive experiences with public transport compared to those who are not disabled. Only 58% of disabled people feel safe and secure on buses or trains at night, in contrast to 73% of non-disabled people. Safety concerns are particularly heightened when public transport facilities are unstaffed or located in relatively remote areas.</p> <p>Disabled people are less likely to hold a driving licence than non-disabled people (51% compared with 75%); they are less likely to have household access to a car (52% compared with 77%), and are less likely to drive everyday (25% compared with 47%). They are more likely to select car / van passenger as their main mode of travel than non-disabled people (18% compared with 12%). Overall, they are still slightly less likely to use car / van as their main mode of travel as either a driver or passenger (60% compared to 66%).</p> <p>A smaller proportion of disabled people meet physical activity recommendations than non-disabled people and providing safe and accessible opportunities for disabled people to be physically active through travel could play an important role in reducing this inequality.</p> <p>Disabled people are slightly more likely to walk as their main mode of transport than non-disabled people (24% of disabled people selected walking as their main mode of transport compared to 21% of non-disabled people). Inaccessible and hostile pedestrian environments that inhibit walking and wheeling can restrict accessibility.</p> <p>23% of disabled people do not associate cycling as an activity for people like them, 31% do not cycle but would like to start</p> <p>Disabled people may face several barriers to cycling, including inaccessible cycle infrastructure, cost of non-standard cycles, cycles not being legally recognised as mobility aids, lack of cycle facilities to accommodate parking and storage of non-standard cycles, and lack of inclusion in imagery and language used to describe cycling.</p>	<p>Transport Scotland. Disability and Transport, findings from the SHS, 2021</p> <p>Scottish Government. Scotland's Wellbeing – Measuring the National Outcomes for Disabled People, 2019).</p> <p>Cycling for Everyone, Sustrans, 2020</p> <p>Wheels for wellbeing. A guide to inclusive cycling, 2020</p> <p>Transport for All, 2020</p> <p>Scottish Crime and Justice Survey, Scottish</p>



	<p>Cycling rates amongst disabled people are lower than those who are not disabled even though 75% of disabled cyclists use the cycle as a mobility aid, with the same proportion finding cycling easier than walking. However, disabled cyclists cite inaccessible cycle infrastructure, cost of non-standard cycles and the inability to cycle in places where a mobility scooter would be allowed as the biggest barriers to cycling.</p> <p>Disability is one of the five groups of protected characteristics covered by the hate crime legislation. Attacks against disabled people are often different from other hate offences in that they might be perpetrated by friends, family members or carers. In 2021/22, 12.9% of adults who reported being a victim of crime were from disabled, compared to 9.1% of non-disabled adults.</p>	<p>Government, 2023</p>
<p><b>Gender Reassignment</b></p>	<p>There is limited data and evidence available on the experiences of transgender people. A 2007 survey of 71 transgender people in Scotland found that 30% of respondents had an income of over £20,000, and 48% of respondents had an income under £10,001. While this dataset covers only a small sample it is considered reasonable to assume that trans people have lower income, and experience structural disadvantages in accessing employment and training opportunities, and are therefore at a higher risk of transport poverty.</p> <p>Transgender identity is one of the five groups or protected characteristics covered by the hate crime legislation. Nearly half of transgender persons in Scotland experienced a transphobic hate crime or incident in the year previous to 2017, according to estimates. This can impact mental health such as anxiety when using active modes of travel or public transport services. These individuals may feel forced to hide/ modify their identities to avoid discrimination which could exacerbate negative mental health impacts.</p> <p>Transgender or gender non-conforming people may feel less safe, particularly during hours of darkness when places may be poorly lit, and when public transport facilities are unstaffed or in remote locations, for fear of harassment or discrimination.</p> <p>Young people who identify as transgender or non-binary are more likely to have negative experiences with public transport, with 45% experiencing bullying or discrimination while travelling on the bus.</p>	<p>Scottish Transgender Alliance, 2008</p> <p>Stonewall Scotland, 2017</p> <p>Life in Scotland for LGBT Young People, 2020</p> <p>Baseline data report - Young Persons' Free Bus Travel Scheme, Transport Scotland, 2022</p>
<p><b>Marriage and Civil Partnership</b></p>	<p>No research has been identified.</p>	
<p><b>Pregnancy and Maternity</b></p>	<p>Pregnant women or parents travelling with pushchairs and young children may find journeys are uncomfortable or difficult, especially without rest stops, and may find certain types of public transport options are inaccessible.</p> <p>Pregnant women may have safety concerns about travelling at night or during isolated times of day, and when public transport facilities are unstaffed or in remote locations. They may also find it difficult to travel comfortably by active travel or public transport during peak hours.</p> <p>The unborn children of pregnant women are more vulnerable to the harmful effects of air pollution than others.</p> <p>Walking and cycling are both safer forms of exercise in pregnancy and can provide an important way for pregnant women to maintain good health and wellbeing.</p>	<p>Scottish Health and Inequality Impact Assessment Network. Health and Transport: A guide, 2018</p> <p>UK Chief medical officers report: Physical activity guidelines, 2019</p> <p>NTS2 SEQIA Screening report, Scottish</p>

		Government, 2021
<b>Race</b>	<p>Evidence suggests that people from ethnic minority groups tend to live in low-income urban areas where the risk of assault is higher.</p> <p>Levels of walking for transport are similar amongst white Scottish; white British and Asian, Asian Scottish or Asian British groups (with 65%; 64% and 68% reporting walking as a means of transport in the previous 7 days); however there are higher levels of walking amongst white Polish; Other white and Other groups (75%; 82% and 77% respectively).</p> <p>Levels of cycling are similarly low across all ethnic groups, with slightly higher levels seen amongst white other British; other white; and other groups (with 7%; 14% and 7% respectively saying they had cycled for transport in the past 7 days) compared with the 4%; 5% and 3% of white Scottish; white Polish and Asian, Asian Scottish or Asian British groups.</p> <p>One in five people from ethnic minority groups (20%) state the cost of a suitable cycle as being a barrier for not cycling.</p> <p>Levels of bus use are similar amongst white Scottish and white British groups, with 24% and 19% reporting using the bus in the previous seven days; however there are higher levels of bus use amongst Asian, Asian Scottish or Asian British; white Polish; Other white and Other groups (35%, 36%, 32%, and 42% respectively). Levels of train use are similarly low across all ethnic groups. Those in white Scottish and white other British groups are more likely to use cars, with 45% and 46% respectively reporting car use daily, compared with 37%; 23%; 28% and 29% of white Polish; other white; other and Asian, Asian Scottish, or Asian British respectively.</p> <p>White Scottish (72%) and white other British (81%) groups are also more likely to hold a driving licence than white Polish (50%); other white (53%); other (54%) and Asian, Asian Scottish or Asian British groups (57%). Ethnic minority groups may therefore be more reliant on public transport and active travel. Consequently, issues of cost and safety may disproportionately impact these groups, affecting their outcomes and opportunities.</p> <p>Certain ethnic groups have higher prevalence of disease such as diabetes and cardiovascular disease where increased levels of physical activity and reduced levels of exposure to air pollution would be of benefit.</p> <p>Race is one of the five groups or protected characteristics covered by the hate crime legislation and racial crime is the most commonly reported hate crime with 3,249 charges reported in Scotland in 2017 -18. Racial discrimination, harassment or abuse can create a barrier to travel for ethnic minority groups who are more likely to be subject to hate crimes.</p> <p>People from some ethnic groups may feel less safe, particularly during hours of darkness when places may be poorly lit, and when public transport facilities are unstaffed or in remote locations, for fear of harassment or discrimination.</p> <p>Young people from ethnic minority groups are more likely to have experienced bullying or discrimination on buses than those from white ethnic groups: 25% compared to 17%.</p> <p>16% of people from ethnic minority groups do not associate cycling as an activity for people like them, 55% do not cycle but would like to start.</p> <p>33% of people from ethnic minority groups (in comparison to 24% of White people) are not confident in their cycle skills.</p>	<p>Cuthbertson, 2018</p> <p>Scottish Household Survey, 2019, reported in Scottish Transport Statistics no.39, 2020</p> <p>Public Health Scotland. Scottish Migrant and Ethnic Health Research Strategy Group Report, 2014</p> <p>Scottish Government, 2021</p> <p>Cycling for Everyone, Sustrans, 2020</p> <p>Bike Life, Sustrans, 2019</p> <p>Baseline data report - Young Persons' Free Bus Travel Scheme, Transport Scotland, 2022</p>
<b>Religion or Belief</b>	<p>Religion is one of the five groups or protected characteristics covered by the hate crime legislation. Safety, and perception of safety, are important for people from particular religious or faith communities, for whom concern about hate crime is a particular issue. For religious people who have a marked religious identity through clothing there is an increased risk of harassment or discrimination.</p>	<p>Department for Transport, 2020</p> <p>Scotland's Census, Scottish</p>



	<p>Over a third of the Scottish population (36.6%) do not have a stated religion and this is the largest category within the 2011 census. Next to this 32.4% of people identified the Church of Scotland as their main belief and 15.9% identified the Roman Catholic Church. There are a number of other religious minorities in Scotland, with Muslim being the largest of these at 1.5%.</p> <p>With regards to poverty, 52% of Muslim adults are living in relative poverty after housing costs. This is more than double the percentage of the next highest group 'Other Religion' for which 21% are living in relative poverty. Muslims had significantly lower median hourly earnings (£9.19) than those of no religion or Christians (both £11.39). As such, this group might be more vulnerable to the costs of transport and face barriers in accessing employment, education, health care and other services as a result.</p>	<p>Government, 2011</p> <p>Scottish Government, 2021</p>
<p><b>Sex</b></p>	<p>Women are more likely to make multi-stop and multi-purpose trips, combining travel to work with trips for other purposes such as taking children to school, looking after family members or shopping.</p> <p>The proportion of men and women who report walking as a means of transport is similar (68% of men compared with 65% of women)</p> <p>A higher proportion of men cycle, with 6% of men having done so as a means of transport in the last week compared to 3% of women.</p> <p>Women are more likely to use the bus, with 26% of women taking the bus at least once a week compared to 23% of men.</p> <p>Women's concerns when travelling by public transport largely relate to gender-based violence and assault, including sexual harassment when travelling, especially at night.</p> <p>A slightly higher proportion of young women (17%) have experienced bullying or discrimination on buses than men (15%).</p> <p>Women report feeling less safe than men when cycling, particularly during hours of darkness, and road space reallocation to provide dedicated space for cycling is cited as being more important to women than men.</p> <p>17% of women do not associate cycling as an activity for people like them, 36% of women do not cycle but would like to start.</p> <p>20% of women stated that having to travel with children, other passengers or too much stuff to carry was a barrier that stops them from cycling. 39% of women would find access to a cargo cycle helpful for them to cycle more or start cycling.</p> <p>35% of women (in comparison to 15% of men) are not confident in their cycle skills.</p> <p>Teenage girls have reported they choose not to cycle because of negative stereotypes, a lack of role models and low levels of cycle confidence. A Sustrans study conducted in Brighton and Hove found that just 0.4 percent of secondary school-aged girls' cycle to school regularly, compared to 4.7 percent of boys.</p>	<p>Scottish Household Survey, 2019, reported in Scottish Transport Statistics no.39, 2020</p> <p>Sustrans. Inclusive city cycling: Reducing the gender gap, 2019</p> <p>NTS2 SEQIA screening report, 2021</p> <p>Cycling for Everyone, Sustrans, 2020</p> <p>Bike Life, Sustrans, 2019</p> <p>Girls' Bike Club: building confidence and self belief for secondary school girls, Sustrans, 2021</p> <p>Baseline data report - Young Persons' Free Bus Travel Scheme,</p>

		Transport Scotland, 2022
<b>Sexual Orientation</b>	<p>Sexual orientation is one of the five groups of protected characteristics covered by the hate crime legislation and the most pertinent issue faced by this group relates to fears about intimidation, violence and/or abuse. It is estimated that 17% of LGBT people, and one in four disabled LGBT people, experienced a hate crime in the twelve months prior to 2017, an increase from 9% in 2013.</p> <p>LGBTQ+ people may feel less safe, particularly during hours of darkness when places may be poorly lit, and when public transport facilities are unstaffed or in remote locations, for fear of harassment or discrimination.</p> <p>Young people who identify as LGBT are more likely to have experienced bullying or discrimination while travelling on buses: 3% compared to 18% of those who identify as straight/heterosexual.</p>	<p>Stonewall Scotland, 2017</p> <p>Baseline data report - Young Persons' Free Bus Travel Scheme, Transport Scotland, 2022</p>
<b>Socio-Economic Disadvantage</b>  <b>(People without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)</b>	<p>National trends indicate that income poverty disproportionately impacts groups who face existing structural disadvantages, including disabled people, women and specific ethnic groups. This can lead to poor health and wellbeing outcomes, and detrimentally affect the equality of opportunity a person experiences.</p> <p>There are variations in levels of employment across the SEStran region, although only Clackmannanshire, Falkirk and Fife have an employment rate below the national average. All local authorities have experienced a growth in their employment rates since 2009, with the highest growth being in West Lothian.</p> <p>When looking at the main method of travel to school by SIMD quintiles, those in the lower two quintiles (i.e. the 40% most deprived) are more likely to walk to school or travel by bus while those in the upper two quintiles (i.e. the 40% least deprived) are more likely to travel by car or by school bus.</p> <p>Those living in the 10% most deprived areas of Scotland are more likely to walk or take the bus to work.</p> <p>People living in deprived areas tend to have higher levels of exposure to road traffic risk, with greater proximity to high volumes of fast-moving traffic and on-street parking.</p> <p>Being able to access education, employment and training are critical for low income households as a means of escaping poverty, as well as for their general wellbeing and improved access to transport is a key enabler to this. Evidence indicates that the jobs that can be more easily done at home are also better paid on average than those that cannot. 15% of employees work fully from home (2022), a significant drop from 38% in 2021. In direct contrast, 39% are working hybrid, compared with 16% in 2021. The majority of these work from home for 50% or more of their time. An unchanged 46% of employees don't work from home at all. Those on the lowest salaries most likely to be in occupations where homeworking is not available. Over 9% of those in 'caring, leisure and other service', 'process, plant and machine operatives' and 'elementary' occupations don't work from home at all.</p> <p>There is a significant difference in objective pay between key and non-key workers, with a median of £25,837 and £31,200 respectively.</p> <p>Affordable and accessible transport can allow children from low-income households to access education and recreational opportunities, and allow parents to balance their parenting with their own educational or employment commitments. Furthermore, recent research by Transport Scotland found that travel cost is also an issue for families with young people pursuing further education. Yearly travel passes are expensive and can diminish considerable portions of most household budgets with nearly one third of respondents to a recent survey (31.4%) stating that they pay more than £12 to travel to school, college, or university each week.</p> <p>Evidence shows that access to bikes also increases with household income and household size with bicycle access being higher in rural areas than urban areas.</p> <p>People more likely to be at risk of deprivation (19%) state the cost of a suitable cycle as being a barrier for not cycling.</p> <p>15% of people more likely to be at risk of deprivation think that cycle security is good in their local area.</p>	<p>Labour Market Statistics, Scottish Government, 2021, Poverty Alliance, 2018</p> <p>Scottish Youth Parliament, 2019</p> <p>Scottish Government, 2021</p> <p>Christie et al, 2010</p> <p>Transport Scotland, 2020</p> <p>Cycling for Everyone, Sustrans,</p> <p>Bike Life, Sustrans, 2019</p> <p>Scottish Crime and Justice Survey, Scottish</p>

	<p>'20% Most Deprived' SIMD Data Zones are the least likely to go into 'Positive Destinations' (e.g. higher education, further education, training, employment, voluntary work and activity agreements) (90.4%) compared to those from the '20% Least Deprived' areas (97.2%). Notably the '20% Most Deprived' Data Zones are primarily located within Urban Areas and their suburbs.</p> <p>Of those more likely to be at risk of deprivation (socio-economic groups D and E), 20% do not associate cycling as an activity for people like them, and 38% do not cycle but would like to start.</p> <p>There is strong relationship between deprivation and pedestrian casualties. In particular, children and young people from deprived areas were found to be involved in traffic injuries, for whom the risk was highest on main roads and on residential roads near shops and leisure services.</p> <p>In 2021/22, 13.7% of adults who reported being a victim of crime were from 15% most deprived areas in Scotland, compared to 9.4% from the rest of Scotland.</p>	<p>Government, 2023 Working Lives Scotland, CIPD, 2022</p>
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**C.4 Assessment of Impacts**

Tables C3-C8 present an assessment of potential impacts on each person category from projects within each of the six SEStran People and Places priority intervention types. These impacts were identified taking account of the evidence available at the time of the IIA. For each person category, the likely benefits from active and sustainable travel behaviour change initiatives, the risks of not delivering initiatives, and potential mitigation measures identified, as well as whether any further research, data collection, or engagement work required.

**Priority intervention 1: Intensive programmes of delivery in targeted communities**

The intended outcomes of this priority intervention are to:

- Increase the number of journeys by active and sustainable modes in and around the target community
- Reduce number of short trips being made by car
- Improve perceptions of accessibility to local goods/ services, education and employment by non-car modes
- Increase the amount of walking, wheeling and cycling for physical activity
- Enable people that were previously excluded from using active or sustainable modes for some journeys to do so

Potential measures include:

- Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment
- Cycle and scooter storage
- Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training and ride leader)
- Walk leader training
- Promotional activities (including campaigns, challenges and events)
- Signage and information
- Travel plans
- Dr Bike
- Social prescribing
- Street audits and installation of recommended facilities
- Community engagement and education
- Incentive programmes
- Multi-modal hubs

Table C11: Impact assessment - Intensive programmes of delivery in targeted communities

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
<p><b>Age</b></p> <p><b>Children under 12</b></p> <p><b>Children aged 12 – 18</b></p> <p><b>Young people aged 18 – 25</b></p> <p><b>Older people aged 65 and above</b></p>	<ul style="list-style-type: none"> <li>• Increased levels of physical activity</li> <li>• Active and sustainable travel behaviours embedded from an early age</li> <li>• Improved concentration and educational attainment</li> <li>• Increased awareness of road safety</li> <li>• Improved cycle skills and road safety confidence</li> <li>• Increased social interactions</li> <li>• Increased independence</li> <li>• Improved access to employment, education and training</li> <li>• Increased access to bikes</li> <li>• Reduce reliance on digital devices for wayfinding</li> <li>• Improved safety, comfort, and accessibility as a result of improved pedestrian infrastructure</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations, or ability to participate in street audits or related activities. If these aren't accessible, this will create barriers to participation for particular groups, including older people.</li> <li>• If communications language and imagery is not inclusive, younger people and older people may feel excluded.</li> <li>• In areas with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using active travel options. This could disproportionately affect people who lack confidence cycling in heavy traffic, including older adults.</li> </ul>	<p>P</p>	<p>Yes</p>
<p><b>Disability</b></p> <p><b>People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid)</b></p> <p><b>People who are blind/have visual impairment</b></p> <p><b>People who are Deaf/BSL user/have hearing impairment</b></p> <p><b>People with a learning disability or cognitive impairment (such as dementia)</b></p> <p><b>People who are neurodivergent (such as autism, ADHD, dyslexia)</b></p>	<ul style="list-style-type: none"> <li>• Increased awareness of road safety</li> <li>• Improved cycle skills and road safety confidence</li> <li>• Increased access to bikes (including adaptive bikes)</li> <li>• Improved safety, comfort and accessibility as a result of improved pedestrian infrastructure</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations, or ability to participate in street audits or activities. If these aren't accessible, this will create barriers to participation for particular groups, including older people.</li> <li>• People with disabilities who are excluded from active travel may miss out on the numerous health benefits associated with active travel. This can also limit social interaction and increase feelings of social isolation.</li> <li>• If communications language and imagery is not inclusive, disabled people may feel excluded.</li> <li>• In areas with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using active travel options. This could disproportionately affect people who lack confidence cycling in heavy traffic, including older adults.</li> <li>• Safety concerns of protected groups like disabled people need to be considered.</li> </ul>	<p>L</p>	<p>Yes</p>

<b>Gender Reassignment</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like transgender people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Marriage and Civil Partnership</b>	There is no evidence that, in isolation, married people or people in civil partnerships will be affected differently by the programme		N	No
<b>Pregnancy and Maternity</b>	<ul style="list-style-type: none"> <li>Maintain/ increase levels of physical activity</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Some women might feel intimidated cycling in a co-educational group.</li> <li>In areas with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using active travel options. This could disproportionately affect people who lack confidence cycling in heavy traffic.</li> </ul>	P	No
<b>Race</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>If communications language and imagery is not inclusive, people from ethnic minority groups may feel excluded.</li> </ul>	P	Yes
<b>Religion or Belief</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like religious people, particularly those who have a marked identity through clothing, need to be considered.</li> </ul>	P	Yes
<b>Sex</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence for women.</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>In areas with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using active travel options. This could disproportionately affect people who lack confidence cycling in heavy traffic.</li> <li>Some women, especially beginners, might feel intimidated cycling in a co-educational group.</li> </ul>	P	Yes
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence.</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like LGBTQ+ people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Socio-Economic Disadvantage (people without access to regular</b>	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to training and employment</li> </ul>	<ul style="list-style-type: none"> <li>Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations, or ability to participate in street audits or related activities. If</li> </ul>	P	Yes



<p><b>income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)</b></p>	<ul style="list-style-type: none"> <li>• Increased access to bikes</li> <li>• Reduce reliance on digital devices for wayfinding</li> <li>• Increased awareness of public transport and other sustainable transport options</li> <li>• Incentives could make public transport more affordable</li> <li>• Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<p>these aren't accessible, this will create barriers to participation for particular groups, including older people.</p> <ul style="list-style-type: none"> <li>• Requiring income proof risks excluding low-income individuals who could benefit from access to bike programmes. Financial incentives for active and sustainable travel, like bicycle subsidies and discounted transport passes, might not be helpful for low-income employees who can't afford a bicycle or public transport in the first place.</li> <li>• Not having somewhere safe to store a bike might deter individuals from getting a bike.</li> <li>• Many key workers work outside of traditional business hours (9am to 5pm), including shift work, weekend work and long hours, meaning they may be excluded from attending activities routinely run at certain times during the day/ week.</li> </ul>		
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**Priority intervention 2: Intensive programmes of delivery in school catchment areas**

The intended outcomes of this priority are to:

- Increase the number of journeys made by young people by active and sustainable modes to school and for other commonly-made journeys
- Increase the number of journeys made by parents/ carers by active and sustainable modes to school and for other commonly-made journeys
- Reduce the number of journeys made by car to school and for other commonly-made journeys
- Improve perceptions of accessibility to school by non-car modes
- Enable people that were previously excluded from using active or sustainable modes for some journeys to do so

Potential measures include:

- Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment
- Cycle and scooter storage
- Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training and ride leader)
- Walk leader training
- Promotional activities (including campaigns, challenges and events)
- Signage and information
- Travel plans
- Community engagement and education
- Incentive programmes

Table C12: Impact assessment - Intensive programmes of delivery in school catchment areas

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
<b>Age</b>  <b>Children under 12</b>  <b>Children aged 12 – 18</b>  <b>Young people aged 18 – 25</b>  <b>Older people aged 65 and above</b>	<ul style="list-style-type: none"> <li>Increased levels of physical activity</li> <li>Improved access to education and training</li> <li>Active and sustainable travel behaviours embedded from an early age</li> <li>Improved concentration and educational attainment</li> <li>Improved access to bikes</li> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>If the school is located in an area with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage parents/carers from allowing their children to actively travel to/ from school.</li> <li>Engaging with secondary schools and their associated feeder primary schools could result in faith schools and additional support needs schools not being able to access the same support offers.</li> <li>If communications language and imagery is not inclusive, carers (such as grandparents) may feel excluded.</li> </ul>	P	Yes
<b>Disability</b>  <b>People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid)</b>  <b>People who are blind/have visual impairment</b>  <b>People who are Deaf/BSL user/have hearing impairment</b>  <b>People with a learning disability or cognitive impairment (such as dementia)</b>  <b>People who are neurodivergent (such as autism, ADHD, dyslexia)</b>	<ul style="list-style-type: none"> <li>Improved access to bikes</li> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Lack of appropriate equipment (for example adapted bikes), could exclude children with disabilities from participating in activities.</li> <li>Cycling only challenges will exclude those unable to cycle.</li> <li>Engaging with secondary schools and their associated feeder primary schools could result in additional support needs schools not being able to access the same support offers.</li> <li>If communications language and imagery is not inclusive, individuals with disabilities may feel excluded.</li> <li>Safety concerns of protected groups like disabled children and young people need to be considered.</li> </ul>	L	Yes
<b>Gender Reassignment</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like transgender young people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider

<b>Marriage and Civil Partnership</b>	There is no evidence that, in isolation, married people or people in civil partnerships will be affected differently by the programme		N	No
<b>Pregnancy and Maternity</b>	<ul style="list-style-type: none"> <li>Maintain/ increase levels of physical activity</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>		P	No
<b>Race</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like ethnic minorities need to be considered, particularly given they already express safety concerns and are more likely to be victims of racial discrimination and hate crimes.</li> <li>If communications language and imagery is not inclusive, children and young people, and their parents and carers from ethnic minority groups might not feel cycling is an activity for people like them.</li> <li>Lack of appropriate equipment (for example bikes), could exclude children and young people from participating in activities.</li> </ul>	P	Yes
<b>Religion or Belief</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>In accordance with their religion, baptised Sikhs are required to wear their hair uncut and wrapped in a turban. During activities where helmets are mandated, children and young people who wear a turban may feel excluded from taking part.</li> <li>Safety concerns of protected groups like religious children or young people, particularly those who have a marked identity through clothing, need to be considered.</li> </ul>	P	Yes
<b>Sex</b>	<ul style="list-style-type: none"> <li>Increased levels of physical activity in teenage girls</li> <li>Improved cycle skills and road safety confidence for teenage girls</li> <li>Increased independence for teenage girls</li> <li>Improved access to higher education and training for teenage girls</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>If communications imagery is not inclusive, teenage girls may not feel cycling is an activity for them.</li> <li>Some young women might feel intimidated cycling in a co-educational group.</li> </ul>	P	Yes
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like LGBTQ+ young people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Socio-Economic Disadvantage</b>  (People without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)	<ul style="list-style-type: none"> <li>Increased levels of physical activity</li> <li>Active and sustainable travel behaviours embedded from an early age</li> <li>Improved concentration and educational attainment</li> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Improved access to education and training</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Incentives could make public transport more affordable</li> </ul>	<ul style="list-style-type: none"> <li>Lack of appropriate equipment (for example bikes), could exclude children and young people from participating in activities.</li> </ul>	P	Yes

**Priority intervention 3: Focusing on sites that are major trip generators**

The intended outcomes of this priority are to:

- Reduce the number of journeys made by car from or to major trip generators
- Increase the number of journeys made by active and sustainable modes from or to major trip generators
- Improve perceptions of accessibility from or to major trip generators by non-car modes
- Enable people that were previously excluded from using active or sustainable modes for some journeys to do so

Potential measures include:

- Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment
- Cycle and scooter storage
- Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training and ride leader)
- Walk leader training
- Promotional activities (including campaigns, challenges and events)
- Signage and information
- Travel plans
- Dr Bike
- Street audits and installation of recommended facilities
- Community engagement and education
- Incentive programmes
- Multi-modal hubs

Table C13: Impact assessment - Focusing on sites that are major trip generators

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
<b>Age</b> Children under 12 Children aged 12 – 18 Young people aged 18 – 25 Older people aged 65 and above	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to employment, education and training</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>If the site is located in an area with poor cycling infrastructure, inadequate footways, limited public transport or heavy traffic, safety concerns may discourage people from using active travel and sustainable options.</li> </ul>	P	Yes
<b>Disability</b> People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid) People who are blind/have visual impairment People who are Deaf/BSL user/have hearing impairment People with a learning disability or cognitive impairment (such as dementia) People who are neurodivergent (such as autism, ADHD, dyslexia)	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Cycling only activities will exclude those unable to cycle.</li> <li>Projects that heavily promote cycling or walking might disadvantage people with disabilities, injuries or chronic health conditions that limit their mobility.</li> <li>Lack of appropriate equipment (for example adapted bikes), could exclude those with disabilities from participating in activities.</li> <li>If communications language and imagery is not inclusive, individuals with disabilities may feel excluded.</li> <li>Safety concerns of protected groups like disabled people need to be considered.</li> </ul>	L	Yes
<b>Gender Reassignment</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like transgender young people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Marriage and Civil Partnership</b>	There is no evidence that, in isolation, married people or people in civil partnerships will be affected differently by the programme.		N	No

<b>Pregnancy and Maternity</b>	<ul style="list-style-type: none"> <li>• Maintain/ increase levels of physical activity</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• People with inflexible work hours or childcare responsibilities may find it difficult to commit to an active or sustainable commute that is less convenient than other modes. This could impact working parents, particularly mothers.</li> </ul>	P	Yes
<b>Race</b>	<ul style="list-style-type: none"> <li>• Improved cycle skills and road safety confidence</li> <li>• Improved access to bikes</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Racial discrimination, harassment or abuse can create a barrier to travel for ethnic minority groups who are more likely to be subject to hate crimes.</li> <li>• If communications language and imagery is not inclusive, people from ethnic minority groups might not feel cycling is an activity for people like them.</li> <li>• Lack of appropriate equipment (for example bikes), could exclude people from ethnic minority groups from participating in activities.</li> </ul>	P	Yes
<b>Religion or Belief</b>	<ul style="list-style-type: none"> <li>• Improved cycle skills and road safety confidence</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Safety concerns of protected groups like religious people, particularly those who have a marked identity through clothing, need to be considered.</li> </ul>	P	To consider
<b>Sex</b>	<ul style="list-style-type: none"> <li>• Improved cycle skills and road safety confidence for women</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Some women might feel intimidated cycling in a co-educational group.</li> </ul>	P	Yes
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>• Improved cycle skills and road safety confidence</li> <li>• Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>• Safety concerns of protected groups like LGBTQ+ people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Socio-Economic Disadvantage</b>  (People without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)	<ul style="list-style-type: none"> <li>• Increased awareness of road safety</li> <li>• Improved cycle skills and road safety confidence</li> <li>• Improved access to training and employment</li> <li>• Improved access to bikes</li> <li>• Increased awareness of public transport and other sustainable transport options</li> <li>• Incentives could make public transport more affordable</li> </ul>	<ul style="list-style-type: none"> <li>• Financial incentives for active and sustainable travel, like bicycle subsidies, might not be helpful for low-income employees who can't afford a bicycle in the first place.</li> <li>• Key workers may travel during low-light hours, which can feel less safe for cyclists and pedestrians, especially without proper infrastructure like streetlights or dedicated cycle tracks, as well as public transport users.</li> </ul>	P	Yes

**Priority intervention 4: Focusing on areas with significant new active travel infrastructure or improved public transport services**

The intended outcomes of this priority are to:

- Increase the use of the new infrastructure or services
- Improve perceptions of active travel and public transport
- Enable people that were previously excluded from using active or sustainable modes for some journeys to do so

Potential measures include:

- Access to cycles, including cycle hire/ share schemes, bike recycling, adapted cycles, and associated equipment
- Cycle and scooter storage
- Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training and ride leader)
- Walk leader training
- Promotional activities (including campaigns, challenges and events)
- Signage and information
- Travel plans
- Dr Bike
- Social prescribing
- Street audits and installation of recommended facilities
- Community engagement and education
- Incentive programmes



Table C14: Focusing on areas with significant new active travel infrastructure or improved public transport services

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
<b>Age</b> Children under 12 Children aged 12 – 18 Young people aged 18 – 25 Older people aged 65 and above	<ul style="list-style-type: none"> <li>Increased levels of physical activity</li> <li>Active and sustainable travel embedded from an early age</li> <li>Improved concentration and educational attainment</li> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Improved access to employment, education and training</li> <li>Reduce reliance on digital devices for wayfinding</li> <li>Improved safety, comfort, and accessibility as a result of improved infrastructure</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>If communications language and imagery is not inclusive, younger people and older people may feel excluded.</li> </ul>	P	Yes
<b>Disability</b> People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid) People who are blind/have visual impairment People who are Deaf/BSL user/have hearing impairment People with a learning disability or cognitive impairment (such as dementia) People who are neurodivergent (such as autism, ADHD, dyslexia)	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased access to bikes (including adaptive bikes)</li> <li>Improved safety, comfort and accessibility as a result of improved pedestrian infrastructure</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>People with disabilities who are excluded from active travel may miss out on the numerous health benefits associated with active travel. This can also limit social interaction and increase feelings of social isolation.</li> <li>If communications language and imagery is not inclusive, disabled people may feel excluded.</li> <li>Safety concerns of protected groups like disabled people need to be considered.</li> </ul>	L	Yes
<b>Gender Reassignment</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like transgender people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider



	<ul style="list-style-type: none"> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>			
<b>Marriage and Civil Partnership</b>	There is no evidence that, in isolation, married people or people in civil partnerships will be affected differently by the programme		N	No
<b>Pregnancy and Maternity</b>	<ul style="list-style-type: none"> <li>Maintain/increase levels of physical activity</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>		P	No
<b>Race</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>If communications language and imagery is not inclusive, people from ethnic minority groups may feel excluded.</li> </ul>	P	Yes
<b>Religion or Belief</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active travel.</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like religious people, particularly those who have a marked identity through clothing, need to be considered.</li> </ul>	P	Yes
<b>Sex</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence for women.</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Some women, especially beginners, might feel intimidated cycling in a co-educational group.</li> </ul>	P	Yes
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence.</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like LGBTQ+ people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Socio-Economic Disadvantage (people without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)</b>	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to employment, education and training</li> <li>Increased access to bikes</li> <li>Reduce reliance on digital devices for wayfinding</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Incentives could make public transport more affordable</li> <li>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</li> </ul>	<ul style="list-style-type: none"> <li>Requiring income proof risks excluding low-income individuals who could benefit from access to bike programmes. Financial incentives for active and sustainable travel, like bicycle subsidies, might not be helpful for low-income employees who can't afford a bicycle in the first place.</li> <li>Not having somewhere safe to store a bike might deter individuals from getting a bike.</li> <li>Many key workers work outside of traditional business hours (9am to 5pm), including shift work, weekend work and long hours, meaning they may be excluded from attending activities routinely run at certain times during the day/week.</li> </ul>	P	Yes

**Priority intervention 5: Programmes to promote opportunities for multi-modal journeys**

The intended outcomes of this priority are to:

- Improve perceptions of accessibility to public transport
- Increase the use of public transport
- Improve perceptions of transport integration
- Reduce the number of medium-length and longer trips being made by car
- Enable people that were previously excluded from using active or sustainable modes for some journeys to do so

Potential measures include:

- Access to cycles, including cycle hire schemes, bike recycling, adapted cycles, and associated equipment
- Cycle and scooter storage
- Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training and ride leader)
- Walk leader training
- Promotional activities (including campaigns, challenges and events)
- Signage and information
- Travel plans
- Community engagement and education
- Incentive programmes
- Dr Bike
- Street audits and installation of recommended facilities
- Multi-modal hubs

Table C15: Impact assessment - Programmes to promote opportunities for multi-modal journeys

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
<b>Age</b> Children under 12 Children aged 12 – 18 Young people aged 18 – 25 Older people aged 65 and above	<ul style="list-style-type: none"> <li>Improved travel skills and confidence</li> <li>Improved access to employment, education and training</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations, or ability to participate in street audits or related activities. If these aren't accessible, this will create barriers to participation for particular groups, including older people.</li> <li>If hubs are located in areas with poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using the hub. This could disproportionately affect people who lack confidence cycling in heavy traffic, including older adults.</li> </ul>	P	Yes
<b>Disability</b> People with a mobility disability (wheelchair user or who can walk only with significant difficulty, often with a walking aid) People who are blind/have visual impairment People who are Deaf/BSL user/have hearing impairment People with a learning disability or cognitive impairment (such as dementia) People who are neurodivergent (such as autism, ADHD, dyslexia)	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Increased social interactions</li> <li>Increased independence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations (e.g. street audits) or activities. If these aren't accessible, this will create barriers to participation for particular groups, including older people.</li> <li>If communications language and imagery is not inclusive, disabled people may feel excluded.</li> <li>If hubs have poor active travel connections or are in highly trafficked areas, individuals who are less confident cycling in traffic, or have mobility issues, may be discouraged from using the hub. The ability to run activities (led walks, rides, cycle skills) would also be limited.</li> <li>Safety concerns of protected groups like disabled people need to be considered.</li> </ul>	L	Yes
<b>Gender Reassignment</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like transgender people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Marriage and Civil Partnership</b>	There is no evidence that, in isolation, married people or people in civil partnerships will be affected differently by the programme.		N	No

<b>Pregnancy and Maternity</b>	<ul style="list-style-type: none"> <li>Maintain/ increase levels of physical activity</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>People with inflexible work hours or childcare responsibilities may find it difficult to commit to an active or sustainable commute that is less convenient than other modes. This could impact working parents, particularly mothers.</li> </ul>	P	Yes
<b>Race</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Racial discrimination, harassment or abuse can create a barrier to travel for ethnic minority groups who are more likely to be subject to hate crimes.</li> <li>If communications language and imagery is not inclusive, people from ethnic minority groups might not feel cycling is an activity for people like them.</li> </ul>	P	Yes
<b>Religion or Belief</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like religious people, particularly those who have a marked identity through clothing, need to be considered.</li> </ul>	P	To consider
<b>Sex</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence for women</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>		P	Yes
<b>Sexual Orientation</b>	<ul style="list-style-type: none"> <li>Improved cycle skills and road safety confidence</li> <li>Increased awareness of public transport and other sustainable transport options</li> </ul>	<ul style="list-style-type: none"> <li>Safety concerns of protected groups like LGBTQ+ people need to be considered, particularly given they already express safety concerns and are more likely to be victims of discrimination and hate crimes.</li> </ul>	N	To consider
<b>Socio-Economic Disadvantage</b>  (People without access to regular income or savings, such as unemployed, single parents, people with lower education or literacy, looked after children, those with protected characteristics)	<ul style="list-style-type: none"> <li>Increased awareness of road safety</li> <li>Improved cycle skills and road safety confidence</li> <li>Improved access to training and employment</li> <li>Improved access to bikes</li> <li>Increased awareness of public transport and other sustainable transport options</li> <li>Incentives could make public transport more affordable</li> </ul>	<ul style="list-style-type: none"> <li>Requiring income proof risks excluding low-income individuals who could benefit from access to bike programmes. Financial incentives for active and sustainable travel, like bicycle subsidies, might not be helpful for low-income employees who can't afford a bicycle in the first place.</li> <li>Key workers may travel during low-light hours, which can feel less safe for cyclists and pedestrians, especially without proper infrastructure like streetlights or dedicated cycle tracks, as well as public transport users.</li> </ul>	P	Yes

**Priority intervention 6: Capacity building within Local Authorities and local partners**

The intended outcomes of this priority are to:

- Local Authorities are better able to establish and manage effective behavioural change projects
- Local partner organisations have increased willingness, capacity and skills to establish and implement effective behavioural change projects

Potential measures include:

- Capacity building (local authority and local partners)
- Street audits and installation of recommended facilities

**Table C16: Impact Assessment - Capacity building within Local Authorities and local partners**

Person category	What are the anticipated benefits/opportunities that active and sustainable travel behaviour change can deliver for this person category?	What are the risks/impacts of not delivering inclusive active and sustainable travel behaviour change, and hence exacerbating inequalities, for this person category?	Assessment impact (H = high negative impact, M = medium negative impact, L = low negative impact, N = no impact, P = positive impact, U = unsure)	Recommendation for short-term action by SEStran/partners to mitigate risks? (Yes / to consider / no)
N/A	N/A	N/A		

C.5 Conclusions and Action Plan

By considering the following factors, SEStran with support from its Local Authority partners can create an active and sustainable travel behaviour change programme that is accessible, equitable, and effective in encouraging everyone to participate in a healthier and more sustainable way of travelling.

- Working closely with the community will help further understanding of the needs and barriers faced by different demographics. This includes people with disabilities, older people, children and young people, people from ethnic minority groups, low-income residents and those with childcare responsibilities
- Promoting a variety of active and sustainable travel options like walking, wheeling, cycling and public transport will cater to different abilities and preferences
- Providing flexible and accessible activity and support offers will encourage participation from a wider range of individuals
- Offering materials in a variety of formats, including online content, printed brochures, easy-read versions, audio recordings and British Sign Language videos, as well as providing materials in multiple languages or offering access to translation services, will ensure materials are accessible for all
- Involving the community in design and implementation ensures it will reflect local needs and will help foster a sense of ownership. Showcasing a variety of people from different backgrounds using active and sustainable travel in programme materials will inspire and motivate others
- All organisations that work with or come into contact with children should have safeguarding policies and procedures to ensure that every child, regardless of their age, disability, gender reassignment, race, religion or belief, sex or sexual orientation, has a right to equal protection from harm
- Collecting data on programme participation disaggregated by demographics to identify any unintended exclusion and ensure the programme reaches everyone
- Regularly monitoring and evaluating the programme's effectiveness for different groups and make adjustments as needed to promote continuous improvement and inclusivity

Table C9: Action Plan

Risk	Mitigation	1 Intensive programmes of delivery in targeted communities	2 Intensive programmes of delivery in school catchment areas	3	4	5 Programmes to promote opportunities for multi-modal journeys	Stage
If an area has poor cycling infrastructure, inadequate footways, or heavy traffic, safety concerns may discourage people from using active travel options. This could disproportionately affect people who lack confidence cycling in heavy traffic.	Consider whether delivery of behaviour change measures would be appropriate in this location. Identify opportunities to support infrastructure improvements.	☐	☐	☐	☐	☐	Inception
If hubs are located in areas with poor active travel connections, or highly trafficked areas, individuals who are less confident cycling in traffic, or have mobility issues, may be discouraged from using the hub.	Consider accessibility factors from the outset. Ensure facilities are accessible and not located in locations poorly served by active travel connections, or in highly trafficked areas.					☐	Inception
Engaging with schools could result in faith schools and additional support needs schools not being able to access the same support offers.	Consider if school programmes could support neighbouring faith or additional support needs schools.		☐				Inception
If communications language and imagery is not inclusive, older people, disabled people, people from ethnic minority groups, teenage girls/women may feel excluded.	<p>People are more likely to connect with messages that feature people who look like them or who they can identify with. Seeing others from similar backgrounds enjoying active and sustainable travel can be inspiring and motivating. Include diverse selection of 'real life' people within campaign images.</p> <p>Community groups can leverage their existing networks to reach out to diverse populations within the community, this ensures that people from protected groups have the opportunity to benefit from active and sustainable travel.</p>	☐	☐	☐	☐	☐	Throughout



<p><b>Lack of appropriate equipment (including adapted cycles), could exclude people from participating in activities.</b></p>	<p>Embedding processes which ensure support reaches intended audiences. Work with community groups who have existing connections with target population groups.</p> <p>Ensure adaptive cycles are included within cycle offerings.</p>	<p>✓</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Inception</p>
<p><b>Cycling only challenges will exclude those unable to cycle.</b></p>	<p>Deliver multi-modal challenges which encourage participation for walking, cycling, wheeling and public transport use.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Inception</p>
<p><b>Safety concerns of protected groups like disabled people, transgender people, people from ethnic minority groups, people from different religious backgrounds, LGBTQ+ young people and young people need to be considered.</b></p>	<p>Working closely with the community will help further understanding of the needs and barriers faced by different demographics.</p> <p>Deliver activities targeted at specific groups, for example women and ethnic minority groups. This can allow individuals to discuss topics specific to their experiences. This sense of community and shared understanding can be motivating.</p> <p>Work with community groups who have existing relationships and an existing level of trust with protected groups.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Throughout</p>
<p><b>In accordance with their religion, baptised Sikhs are required to wear their hair uncut and wrapped in a turban. During activities where helmets are mandated, children and young people who wear a turban may feel excluded from taking part.</b></p>	<p>Ensure school activity providers have procedures in place to enable participation from children and young people who are unable to wear a helmet as a result of religious beliefs.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Project start</p>
<p><b>Some women might feel intimidated cycling in a co-educational group.</b></p>	<p>Women-only groups can provide a supportive environment to learn and build confidence. Women-only groups can allow women to discuss topics specific to their experiences. This sense of community and shared understanding can be motivating.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Throughout</p>
<p><b>Financial incentives for active and sustainable travel, like cycle subsidies, might not be helpful for low -income employees who can't afford a cycle in the first place.</b></p>	<p>Provide fully funded access to cycle packages for low-income groups.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Inception</p>
<p><b>Requiring income proof risks excluding low -income individuals who could benefit from access to cycle programmes.</b></p>	<p>Remove this requirement by working with community organisations who have existing relationships and an existing level of trust with low-income groups.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Inception</p>
<p><b>Key workers may travel during low-light hours, which can feel less safe for cyclists and pedestrians, especially without proper infrastructure like streetlights or dedicated cycle tracks, as well as public transport users.</b></p>	<p>Identify opportunities to support active travel infrastructure improvements.</p> <p>Promote public transport options alongside active travel.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Throughout</p>
<p><b>Not everyone has access to the internet, reliable devices or the digital literacy skills to participate in online consultations, or ability to participate in street audits and related activities. If these aren't accessible, it will create barriers to participation for particular groups, including older people, disabled people and low-income households.</b></p>	<p>Consider accessible consultations and activities: available in multiple formats (online, offline, easy-read versions), online platforms are accessible for users with visual impairments. Consider offering translation services and alternative communication methods, for example phone, in-person meetings, sign language interpretation. Consider different needs, for example if holding in-person meetings, choose accessible venues. Schedule meetings at convenient times and locations, be mindful of neurodiversity by providing options for quieter spaces or breaks during meetings.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Throughout</p>
<p><b>Not having somewhere safe to store a cycle might deter individuals from getting a cycle.</b></p>	<p>Integrate the provision/ identification for cycle storage with access to cycle measures.</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>☐</p>	<p>Throughout</p>

<p>Many key workers work outside of traditional business hours (9am to 5pm), including shift work, weekend work and long hours, meaning they may be excluded from attending activities routinely run at certain times during the day/week.</p>	<p>Vary the time and location of activities according to the needs of the community.</p>	<p>✓</p>		<p>□ □</p>	<p>Throughout</p>
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## SEStran People and Place Grant Fund – Eligibility Criteria and Assessment Process

### Purpose of the Fund

In line with the [Regional Transport Strategy 2035](#), the SEStran People and Place Grant Fund is a key part of the regional delivery of active and sustainable travel behaviour change in South East Scotland. The SEStran People and Place Delivery Plan is designed to deliver behaviour change interventions to support people in the region to choose active and sustainable travel over private vehicles for utility journeys. The plan will:

- Increase the proportion of active and sustainable journeys in the region
- Increase awareness of the benefits of active and sustainable travel to encourage future behaviour change
- Increase the use of active and sustainable travel modes among underrepresented groups in the region who might face additional barriers
- Collaborate with local authorities and third-sector partners to strengthen capacity and capability in active and sustainable travel

### Project Eligibility

As part of SEStran's People and Place Plan, a list of interventions has been developed for which grant funding is available for projects that support delivery of these. There will be an assumed minimum grant per organisation of £50,000 to ensure projects are of a sufficient scale to deliver regional impact.

In addition to the criteria outlined below, we expect all of the projects we fund to be fully inclusive and accessible to all. As such, all projects should conform with the Public Sector Equality Duty and give due regard to the need to:

- put an end to unlawful behaviour that is banned by the Equality Act 2010, including discrimination, harassment and victimisation
- advance equal opportunities between people who have a protected characteristic and those who do not
- foster good relations between people who have a protected characteristic and those who do not

A project specific Integrated Impact Assessment (IIA) can be used to demonstrate the above. A programme wide IIA has been produced and will be shared, and all projects will be expected to implement the recommendations of this where appropriate.

### What is eligible for funding

Eligible projects must fit within one or more of the programmes identified below as part of the wider Plan. Note that budgets are subject to change:

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>City of Edinburgh</b>	<p>A broad-ranging behavioural change programme in line with the City Mobility Plan that focuses on projects that impact on health and wellbeing of two priority groups: Third age (Retired, active people) and Mobility restricted (mobility restrictions due to age, health or disability)</p> <p>Promotion of the use of the newly completed infrastructure, in particular the areas around the Canal-Roseburn-City Centre West East Link (CCWEL)-Leith Walk active travel corridor and the connections to this</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>Improves inclusiveness and accessibility of transport for groups often excluded from active and sustainable travel, and for whom the health benefits of more physical activity are significant</p> <p>Increases the benefits that can be realised from recent/new investment</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Social prescribing</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Multi-modal hubs</p>
<b>Clackmannanshire</b>	<p>An engagement programme with school communities: pupils, their family members/carers and others that travel to or live near school sites</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>Sustains and builds on Clackmannanshire Council's existing schools programme, supporting the Council's priorities for investment to target young people and the wider communities in which they live and travel</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Capacity building (local authority and local partners)</p>
<b>East Lothian</b>	<p>A programme to improve and promote multi-modal journeys at specific hubs</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>The nature of travel in East Lothian means that interchange (walk, cycle, bus, train, private car) is essential for many journeys. This project enhances and promotes opportunities to do so, and supports East Lothian Council's priorities</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Dr Bike</p> <p>Street audits and installation of recommended facilities</p> <p>Multi-modal hubs</p> <p>Capacity building (local authority and local partners)</p>

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>Falkirk</b>	<p>A programme to build capacity to deliver change</p> <p>A broad-ranging behavioural change programme with a focus in more deprived communities, in schools, and providing continuity with existing activities</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>A short-term priority is to build capacity within Falkirk Council and community-based partners to develop and deliver behavioural change projects</p> <p>Supports change in some relatively deprived communities across a range of trip types, and sustains and builds on the longstanding Take the Right Route campaign</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Social prescribing</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Capacity building (local authority and local partners)</p>
<b>Fife</b>	<p>A broad-ranging behavioural change programme in and around Leven</p> <p>A programme of investment focused on children and young people's journeys to and from schools and higher education</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>The focus on Leven enables additional support to the work of the Leven Programme, building on existing community capacity for change and the nationally important priorities for the community, as recognised by the new journey opportunities of the rail link and investment in active travel</p> <p>The focus on schools and higher education supports the Council's priorities to enable young people to make more active and sustainable travel choices, sustaining and building upon ongoing work with this target group</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Social prescribing</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Multi-modal hubs</p>
<b>Midlothian</b>	<p>A programme to improve and promote sustainable travel to new developments</p> <p>Promotion of active and sustainable travel to NHS sites</p>	<p>Significant new developments are being built-out and occupied, and this project supports Midlothian Council's aspirations for as many journeys to and from them as possible to be made by sustainable modes</p> <p>NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes</p>	<p>Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment</p> <p>Cycle and scooter storage</p> <p>Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader)</p> <p>Walk leader training</p> <p>Promotional activities (including campaigns, challenges and events)</p> <p>Signage and information</p> <p>Travel plans</p> <p>Dr Bike</p> <p>Street audits and installation of recommended facilities</p> <p>Community engagement and education</p> <p>Incentive programmes</p> <p>Multi-modal hubs</p> <p>Capacity building (local authority and local partners)</p>

Local Authority	Location and/or project focus	Rationale for selection	Potential types of measures to be prioritised
<b>Scottish Borders</b>	A broad-ranging behavioural change programme in and around Hawick Promotion of active and sustainable travel to NHS sites	Initial focus in Hawick has been chosen because it supports multiple objectives (some relatively deprived communities, location of regeneration project, key areas of progress include the Hawick Action Plan <sup>1</sup> and Town Centre Marketing Pilot) and because of the recent improvements to active travel infrastructure accompanying the Hawick Flood Protection Scheme NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance, adult cycle training, and ride leader) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Dr Bike Social prescribing Street audits and installation of recommended facilities Community engagement and education Incentive programmes Capacity building (local authority and local partners)
<b>West Lothian</b>	A programme to build capacity to deliver change A broad-ranging behavioural change programme with a focus in more deprived communities and schools Promotion of active and sustainable travel to NHS sites	A short-term priority is to build capacity within West Lothian Council and community-based partners to develop and deliver behavioural change projects Other work will support West Lothian Council's aspirations to enable more people in deprived communities to benefit from active and sustainable travel choices NHS sites are some of the region's largest trip attractors, and access to healthcare is one of the most important journey purposes	Capacity building (local authority and local partners) Street audits and installation of recommended facilities Access to cycles, including cycle hire/share schemes, bike recycling, adapted cycles, and associated equipment Cycle and scooter storage Cycle skills training (including support for Bikeability Scotland, bike maintenance) Walk leader training Promotional activities (including campaigns, challenges and events) Signage and information Travel plans Community engagement and education Incentive programmes

<sup>1</sup> Three key themes; making Hawick a 'Great Place for Working and Investing'; a 'Great Place for Living and Learning'; and a 'Great Destination to Visit'. Adopted Local Development Plan 2, Scottish Borders Council, [Adopted Local Development Plan 2 | Local development plan | Scottish Borders Council](#) ([scotborders.gov.uk](http://scotborders.gov.uk))

## What is not eligible for funding

- Any project that does not fit within the programmes listed
- Any project that provides for the construction of active or sustainable travel infrastructure
- Any project that does not focus on increasing participation in active or sustainable travel

## Eligible expenditure

This is a project based grant fund that will operate on the basis of full cost recovery, so all costs related to the delivery of the project funded will be eligible to be claimed. This will include relevant staff costs as well as proportional overheads, premise costs etc. Costs that do not relate to the specific project being funded (for example, whole organisation overheads or entire premises costs) cannot be funded.

## Organisation Eligibility

The fund will be open to any public body, charity or community organisation (note that local authorities are not eligible for this fund).

All applicants must be able to demonstrate a certain level of capability to deliver behaviour change projects, and have a baseline level of understanding, organisation and team set-up, finances, and insurance. We may ask for evidence of this when you submit your application.

If part of your application involves passing on funding to other groups, they will also need to comply with all of the eligibility criteria within this section.

## Community Organisations

To be eligible, community organisations must:

- Have a signed constitution
- Have the required number of board members, including a minimum of three unrelated board members
- Have an up to date Public Liability Insurance certificate
- Be financially solvent, and be able to provide evidence of such, such as recent accounts
- Have a project team of at least two people committed to lead and manage the project for its duration, including finance and administration

## Fair Work First

All grants awarded with Scottish Government funds from 1 July 2023 (which includes this fund) must comply with the [Fair Work First](#) conditionality requiring grant recipients to pay at least the real Living Wage, and provide appropriate channels for effective workers' voice, such as trade union recognition.

All principal grant recipients (in the case of People and Place, this is SEStran) are required to meet the real Living Wage and effective voice conditions. Where the grant recipient issues funding to third-party organisations to support the delivery of the funded activity, the conditionality applies as follows:

- The real Living Wage condition applies to workers directly engaged in the delivery of the funded activity who are aged 16 and over, including apprentices and based anywhere in the UK.
- The effective voice condition does not apply.

### *Real Living Wage*

- In general, a grant recipient must demonstrate it is paying the Real Living Wage (rLW) before it can access a grant
- For the purposes of this grant fund, this condition only applies to workers directly engaged in the delivery of the funded activity who are aged 16 and over, including apprentices and based anywhere in the UK.

Evidence required will depend on the size of the grant as per [Scottish Government guidance](#).

### Work with vulnerable people

It is important we have assurances relating to the safeguarding of vulnerable groups. If your programme involves working with vulnerable groups, we will ask you to confirm that you have:

- Robust safeguarding policies and procedures in place to protect vulnerable adults and children (these may include things such as a specific safeguarding policy, training, support and supervision of staff, a Code of Conduct)
- Whistleblowing and monitoring and complaints processes.
- A clear procedure which must be followed if you become aware of any specific safeguarding incident

### Assessment Process

Once submitted, to ensure best value, applications will be scored by 3 members of SEStran staff in line with the scoring criteria below. The average score under each criteria will then be taken and compiled into an overall score for each project.

A recommendation will then be made on a project by project basis, based on the score, but also taking due account of ensuring a geographical spread of projects and transport modes across the region, and how the projects fit within each programme's budget. This recommendation will then be reviewed by a funding panel, who will make a final recommendation on which projects are successful in line with the set criteria to be approved in line with the Grant Standing Orders. The Panel will be made up of a minimum of 3 members of staff from SEStran (not including those who have marked the applications). Decisions of the Panel are final and are not subject to appeal.

### Organisation Financial Assessment

Alongside the assessment, a financial sustainability assessment will be undertaken on organisations in line with City of Edinburgh Council's processes.

### Eligibility Assessment

Prior to the scoring being carried out, an eligibility assessment will be undertaken to ensure the applicant organisation and the project being applied for meet the eligibility criteria above. Where the application is found to be ineligible, it will not be scored and will be deemed to be unsuccessful.



## Scoring Criteria

The scoring criteria that have been developed have been designed to assess projects on their overall quality, fit within the Delivery Plan, experience of the organising delivering them, partnership work and value for money. A total score will be given out to 100 in line with the following criteria.

### *Project outcomes*

This section will be assessed based on how the project will deliver against the relevant outcomes of the specific priority intervention(s) within the Delivery Plan. The following scores will be assigned:

0	Project is unclear or unrelated to any of the priority interventions. No reference to how the project will deliver against relevant outcomes.
6	Project has some relevance to a priority intervention but lacks detail and/or specificity. Project has some reference to relevant outcomes but does not demonstrate how it will deliver against these.
12	Project partly demonstrates how it will deliver on some or all outcomes and has some alignment with the delivery of a priority intervention.
18	Project demonstrates how it will deliver on some relevant outcomes and is specific to relevant priority interventions.
24	Project demonstrates how it will deliver on some or all relevant outcomes and aligns with delivery of the relevant priority intervention(s).
30	Project clearly and comprehensively demonstrates how it will deliver on the outcomes of the relevant priority interventions. Project is specific and tailored to the relevant priority interventions and respective location(s).

### *Value for Money*

This section will be assessed based on the project budget provided, along with the project delivery plan and outcomes. Consideration will also be taken of the overall Delivery Plan budget, the affordability for specific projects within that, and the comparative costs of other proposals (including costs of projects delivered in 2024/25). The following scores will be assigned:

0	Project cost is disproportionately high or low respective to the submitted delivery plan and outcomes and the overall People and Place budget
10	Project cost is disproportionately high or low respective to the submitted delivery plan and outcomes but fits within the overall People and Place budget. Project budget and/or submitted delivery plan and/or outcomes will need adjusted to demonstrate value for money.
20	Project cost is proportionate to the submitted delivery plan and outcomes, but not the overall People and Place budget. Project budget will need adjusted to fit within the programme.
30	Project cost is proportionate to the submitted delivery plan and outcomes and the overall People and Place budget

### *Delivery Programme*

This section will be assessed based on the project's delivery programme provided.

Consideration will be taken on use of resources, project timescales, project milestones and risk management. The following scores will be assigned:

0	No evidence of delivery programme or planning in relation to the proposed project
4	Partial details are provided relating to a delivery programme but these are very limited in detail or missing key information, or the delivery approach is unrealistic with insufficient capacity to successfully deliver the project.
8	Delivery programme has been provided but lacks detail or specificity to the project and may be missing some information.
12	Delivery programme demonstrates some understanding of how the project will be delivered. The timescales and/or resourcing are in part appropriate to the delivery of the project and a basic risk management plan is in place.
16	Delivery programme demonstrates a good understanding of how the project will be delivered. Timescales and resourcing are appropriate to the delivery of the project and a good risk management plan is in place.
20	Detailed and comprehensive delivery programme that demonstrates a well planned and appropriately resourced project. Project has a realistic timescale with clear milestones, demonstrating a comprehensive understanding of project delivery, along with a thorough risk management plan.

### *Organisation Experience*

This section will score the evidence that has been provided on an organisations previous success at delivering active and/or sustainable travel behaviour change projects. The following scores will be assigned:

0	No experience provided, or experience is not relevant to behaviour change for the chosen transport mode(s)
3	Relevant experience of delivering behaviour change projects for the chosen transport mode(s), but little or no of evidence of successful delivery of relevant outcomes in previous projects provided
6	Relevant experience of delivering behaviour change projects for the chosen transport mode(s), with some evidence of successful delivery of relevant outcomes in previous projects provided
10	Relevant experience of delivering behaviour change projects for the chosen transport mode(s), with high quality evidence of successful delivery of relevant outcomes in previous projects provided

### *Partnership Work*

This section will score the evidence that has been provided on an organisation's experience and ability to deliver successful projects in partnership with other partner organisations and its relevance for the project. The following scores will be assigned:

0	No evidence of partnership working is provided
2	Partnership working is referenced but no evidence is provided
4	Partnership working is referenced and some partial evidence is provided



6	Some evidence of partnership working is provided and there is some relation to how this will contribute to the delivery of the project.
8	Evidence of partnership working is provided, and a demonstration of how this will contribute to the effective delivery of the project.
10	Relevant and clear evidence of partnership working is provided. Evidence outlines the approach and effectiveness of past experiences of partnership working and how this will contribute to the effective delivery of the project.

# SEStran People and Place Community Grant Fund – Eligibility Criteria and Assessment Process

## Purpose of the Fund

In line with the [Regional Transport Strategy 2035](#), the People and Place Community Grant Fund is a key part of the regional delivery of active and sustainable travel behaviour change under the People and Place Programme. It aims to fund small (£5,000-£50,000) projects that support people to increase their use of active and/or sustainable transport modes. Overall, the People and Place Programme will:

- Increase the proportion of active and sustainable journeys in the region
- Increase awareness of the benefits of active and sustainable travel to encourage future behaviour change
- Increase the use of active and sustainable travel modes among underrepresented groups in the region who might face additional barriers
- Collaborate with local authorities and third-sector partners to strengthen capacity and capability in active and sustainable travel

## Project Eligibility

The Community fund will focus on projects between £5,000 and £50,000 aiming at delivering key local interventions to encourage active and sustainable transport in the SEStran region. Whilst projects can be funded up to a value of £50,000, it is assumed that most projects will be £25,000 or under. For projects between £25,000 and £50,000 we would recommend an early discussion with SEStran to set out the reason for this and further guidance can be given.

Applicants are encouraged to develop inclusive and accessible projects as part of this fund. A project specific Integrated Impact Assessment (IIA) should be used to demonstrate this where it is proportionate to do so.

A programme wide IIA has been produced and will be shared, and all projects will be expected to implement the recommendations of this where appropriate.

## What is eligible for funding

Projects can focus solely on active travel or sustainable transport interventions or a combination of both elements. Projects must align with at least one of the three key People and Place themes below:

### *Schools and Young People*

Interventions in Scottish schools that deliver holistic solutions for creating an environment where Active and Sustainable travel choices are not only an option, but the most effective ways to travel for young people and families.

### *Workplaces*

Interventions that focus on places of work, that make Active and Sustainable travel choices a realistic solution for commuting for staff and volunteers. These could include investment in workplace cycle storage/parking or maintenance provision, or incentivisation schemes that

make wheeling, walking, cycling and public transport a more attractive choices to private car use.

### *Accessibility and Inclusion*

Interventions that focus on inclusion of underrepresented groups in Scotland who might face additional barriers to Active and Sustainable travel, such as cost, social perception, culture, health, ability, and geographical location. Interventions should integrate a good engagement with groups who face such barriers and aim at significantly reducing them to increase opportunities to choose Active and Sustainable travel.

## Location Criteria

Projects should be run within the RTP that they are applying for (but organisations can be based outwith that area). Projects that cross RTP boundaries should get in touch with each RTP and a 'lead' RTP will be agreed who will assess the application and manage any successful project.

## Eligible expenditure

This is a project based grant fund that will operate on the basis of full cost recovery, so all costs related to the delivery of the project funded will be eligible to be claimed. This will include relevant staff costs as well as proportional overheads, premise costs etc. Costs that do not relate to the specific project being funded (for example, whole organisation overheads or entire premises costs) cannot be funded.

## Examples of eligible projects (non-exhaustive list)

### *Active travel projects*

- Creation or development of a community bike or e-bike share scheme
- Cycling facilities at key community destinations such as cycle parking and/or cycle storage
- Provision of a variety of training sessions, such as confidence cycle sessions, bike maintenance sessions, health walks, etc.
- Support on route planning for wheeling, walking and cycling journeys
- Delivery of activities such as cycle led rides, led walks, bike maintenance sessions / Dr Bike sessions, etc

### *Sustainable travel projects*

- Shared-transport projects, including car clubs, car share, etc.
- Engagement initiatives to promote sustainable transport

### *Multi Modal Projects*

- Support for travel planning
- Pop-up mobility hubs – integrating shared transport with public transport
- Promotional campaigns
- Delivery of activities in the community aiming at raising awareness of active and sustainable travel options

## What is not eligible for funding

- Any project that does not focus on increasing rates of wheeling, walking, cycling and/or sustainable travel
- Any project that provides for the construction of active or sustainable travel infrastructure

Please note that this is a non-exhaustive list of projects and we acknowledge that other project proposals could meet the eligibility criteria of this fund; if you wish to discuss your project further, please get in touch.

## Organisation Eligibility

This fund is open to:

- community groups
- voluntary organisations
- registered charities
- social enterprises
- community benefit societies
- community interest companies (CICs)

To be eligible, organisations must:

- Have a signed constitution
- Have the required number of board members, including a minimum of three unrelated board members
- Have an up to date Public Liability Insurance certificate
- Be financially solvent, and be able to provide evidence of such, such as recent accounts
- Have a project team of at least one suitable person committed to lead and manage the project for its duration, including finance and administration
- Comply with the Fair Work First conditionality
- Have robust safeguarding policies and procedures to protect vulnerable adults and children (if applicable to the project)

All applicants should be able to demonstrate a certain level of capability to deliver behaviour change projects, and have a baseline level of understanding, organisation and team set-up, finances, and insurance. We may ask for evidence of this when you submit your application.

Note that this fund is not open to Local Authorities, other public bodies, or businesses.

## Fair Work First

All grants awarded with Scottish Government funds from 1 July 2023 (which includes this fund) must comply with the [Fair Work First](#) conditionality requiring grant recipients to pay at least the real Living Wage, and provide appropriate channels for effective workers' voice, such as trade union recognition.

All principal grant recipients (in the case of People and Place, this is SEStran) are required to meet the real Living Wage and effective voice conditions. Where the grant recipient issues

funding to third-party organisations to support the delivery of the funded activity, the conditionality applies as follows:

- The real Living Wage condition applies to workers directly engaged in the delivery of the funded activity who are aged 16 and over, including apprentices and based anywhere in the UK.
- The effective voice condition does not apply.

### *Real Living Wage*

- In general, a grant recipient must demonstrate it is paying the Real Living Wage (rLW) before it can access a grant
- For the purposes of this grant fund, this condition only applies to workers directly engaged in the delivery of the funded activity who are aged 16 and over, including apprentices and based anywhere in the UK.

Evidence required will depend on the size of the grant as per [Scottish Government guidance](#).

### Work with vulnerable people

It is important we have assurances relating to the safeguarding of vulnerable groups. If your programme involves working with vulnerable groups, we will ask you to confirm that you have:

- Robust safeguarding policies and procedures in place to protect vulnerable adults and children (these may include things such as a specific safeguarding policy, training, support and supervision of staff, a Code of Conduct)
- Whistleblowing and monitoring and complaints processes.
- A clear procedure which must be followed if you become aware of any specific safeguarding incident

### Assessment Process

Once submitted, to ensure best value, applications will be scored by at least 2 members of SEStran staff in line with the scoring criteria below. The average score under each criterion will then be taken and compiled into an overall score for each project.

An internal recommendation will then be made on a project by project basis, based on the score, but also taking due account of ensuring a geographical spread of projects and transport modes across the region, and how the projects fit within the People and Place budget. Decisions are final and are not subject to appeal.

### Organisation Financial Assessment

Alongside the assessment, a financial sustainability assessment will be undertaken on organisations in line with City of Edinburgh Council's processes.

### Eligibility Assessment

Prior to the scoring being carried out, an eligibility assessment will be undertaken to ensure the applicant organisation and the project being applied for meet the eligibility criteria above. Where the application is found to be ineligible, it will not be scored and will be deemed to be unsuccessful.

## Scoring Criteria

The scoring criteria that have been developed have been designed to assess projects on their overall quality, fit within the overall programme's objectives, experience of the organising delivering them, and value for money. A total score will be given out to 100 in line with the following criteria.

### *Community engagement and barrier identification*

Work/engagement with community to identify needs/barriers. The following scores will be assigned:

0	No evidence of community consultation or engagement and no identification of the current community needs and barriers to access active and/or sustainable transport.
6	Insufficient community consultation or engagement and/or limited understanding of the current community needs and barriers to access active and/or sustainable transport.
12	Partial demonstration of community consultation or engagement and/or partial identification of current community needs and barriers to access active and/or sustainable transport.
18	Relevant community engagement work and/or partial identification of current community needs and barriers to access active and/or sustainable transport.
24	Demonstration of a good community engagement work and/or identification of current community needs and barriers to access active and/or sustainable transport.
30	Demonstration of a strong community engagement and clear identification of current community needs and barriers to access active and/or sustainable transport.

### *Project outcomes*

This section will be assessed based on how the project will deliver on the relevant outcomes (related to the programme objectives and the three identified People and Place themes) within the Delivery Plan. The following scores will be assigned:

0	Project is unclear or unrelated to any of the programme objectives and/or the three identified People and Place themes. No reference to how the project will deliver against relevant outcomes.
4	Project has some relevance to the programme objectives and/or any of the three identified People and Place themes but lacks detail and/or specificity. Project has some reference to relevant outcomes but does not demonstrate how it will deliver against these.
8	Project partly demonstrates how it will deliver on some or all outcomes and has some alignment with the programme objectives and/or any of the three identified People and Place themes.
12	Project demonstrates how it will deliver on some relevant outcomes and is specific to relevant programme objectives and any of the three identified People and Place themes.
16	Project demonstrates how it will deliver on some or all relevant outcomes, and aligns with delivery of relevant programme objectives and any of the three identified People and Place themes
20	Project clearly and comprehensively demonstrates how it will deliver on relevant outcomes to the identified programme objectives and any of the three identified

	People and Place themes. Project is specific and tailored to the relevant priority interventions and respective location(s).
--	--

### *Value for Money*

This section will be assessed based on the project budget provided, along with the project delivery plan and outcomes. Consideration will also be taken of the overall Delivery Plan budget, the affordability for specific projects within that, and the comparative costs of other proposals (including costs of projects delivered in 2024/25). The following scores will be assigned:

0	Project cost is disproportionately high or low respective to the submitted delivery plan and outcomes and the available budget
6	Project cost is disproportionately high or low respective to the submitted delivery plan and outcomes but fits within the available budget. Project budget and/or submitted delivery plan and/or outcomes will need adjusted to demonstrate value for money
14	Project cost is proportionate to the submitted delivery plan and outcomes but does not fit within the available budget. Project budget will need adjusted to fit within the programme
20	Project cost is proportionate to the submitted delivery plan and outcomes and the available budget

### *Delivery Programme*

This section will be assessed based on the project's delivery programme provided. Consideration will be taken on use of resources, project timescales, project milestones and risk management. The following scores will be assigned:

0	No evidence of delivery programme or planning in relation to the proposed project
3	Partial details are provided relating to a delivery programme but these are very limited in detail or missing key information, or the delivery approach is unrealistic with insufficient capacity to successfully deliver the project.
6	Delivery programme has been provided but lacks detail or specificity to the project and may be missing some information.
9	Delivery programme demonstrates some understanding of how the project will be delivered. The timescales and/or resourcing are in part appropriate to the delivery of the project and a basic risk management plan is in place.
12	Delivery programme demonstrates a good understanding of how the project will be delivered. Timescales and resourcing are appropriate to the delivery of the project and a good risk management plan is in place.
15	Detailed and comprehensive delivery programme that demonstrates a well planned and appropriately resourced project. Project has a realistic timescale with clear milestones, demonstrating a comprehensive understanding of project delivery, along with a thorough risk management plan.

### *Organisation Experience*

This section will score the evidence that has been provided on an organisations previous success at delivering active and/or sustainable travel behaviour change projects. The following scores will be assigned:

0	No experience provided, or experience is not relevant to project delivery.
5	Relevant experience of delivering projects, but little or no of evidence of successful delivery of relevant outcomes in previous projects provided
10	Relevant experience of delivering projects, with some evidence of successful delivery of relevant outcomes in previous projects provided
15	Relevant experience of delivering projects with high quality evidence of successful delivery of relevant outcomes in previous projects provided



## Case for Change: SEStran Regional Bus Strategy

### 1 INTRODUCTION

- 1.1 The purpose of this report is to inform the Board of the progress of the SEStran Regional Bus Draft Strategy. It is accompanied by a video series, shared with local authorities to work through the draft policies shaping our work.  
<https://storymaps.arcgis.com/stories/d6fd80763fd84b6fb84d27dedbe22c7a>
- 1.2 There will be a slide pack to garner feedback, to be presented at the Partnership Board meeting.

### 2 CONTEXT FOR THE REGIONAL BUS STRATEGY

- 2.1 At the June 2023 Sustran Partnership Board, the board agreed with the recommendations of the Item A5(d) Towards a World Class Bus Service, which included the action to begin progress on a bus strategy for the region.
- 2.2 The decision to begin the strategy was made in the context of a strong policy landscape, with bus highly commended in the Regional Transport Strategy, national documents like NTS2 and the legislation following on from the Transport (Scotland) Act of 2019.
- 2.3 At the SEStran board meeting of June 2024, the Case for Change was agreed by the Board. It is summarised below.

### 3 Key findings of the case for change

- 3.1 The Case for Change is strong. This is particularly true because doing nothing will result in ongoing decline in patronage and network.
- 3.2 There is wealth of environmental and transport policy, which could be better realised by strengthening the bus sector. In actual fact however, bus patronage and network size are down, whilst private car ownership and usage continue to increase.
- 3.3 Local authorities are subsidising weekend and evening services to maintain functioning bus networks, but budget constraints are reducing this year by year. Bus journey times in some parts of the region are triple that of the same car trip, making bus unattractive.
- 3.4 The picture in Edinburgh is brighter, due to the strength of Lothian Buses and the density of population, but buses from surrounding authorities are slowed entering the city by congestion and of course, become part of the traffic themselves.

- 3.5 Population growth, major housing developments, under-22 concessions and the policy environment make now an ideal time to improve bus in the region.
- 3.6 There are significant constraints around funding and public behaviour change, which will present a challenge.

## **4 Key policies of the Draft Bus Strategy**

- 4.1 The Vision for our Bus Strategy, developed at the end of our Case for Change is: *To provide a high quality, affordable, accessible and available bus network for the whole region which is fully integrated with other forms of transport and increases passenger numbers and passenger satisfaction, to support the social, environmental and inclusive economic development of the region.*
- 4.2 This vision flows into three core policy areas to consider, which in turn support the fundamental transport outcome for the strategy – that more people choose to travel by bus and more people can use bus to meet their everyday needs. The three core policy areas will have a focus on movement at a regional level and to neighbouring authorities and include:
- Improve Level of Service – this policy area considers how, where and when the bus network operates. For this regional level strategy, this consists of network principles around connectivity, setting out minimum connectivity requirements based on settlement typologies.
  - Improve Affordability – the policy will set out ambitions related to the affordability of travel by bus across the region.
  - Improve Service Quality – the policy will focus on the other important aspects that help the SEStran region move towards a high-quality bus service. This includes topic areas such as information, ticketing, driver, and network performance.
- 4.3 The suggested policies under these three core areas can be considered here: <https://storymaps.arcgis.com/stories/d6fd80763fd84b6fb84d27dedbe22c7a>

## **5 NEXT STEPS**

- 5.1 SEStran officers will continue to work with Systra and Stantec to develop the strategy and options to appraise.
- 5.2 SEStran will next consult with operators on the policy areas

## **6 RECOMMENDATIONS**

It is recommended that the Board:

- 6.1 Note the video summaries of the policy areas and provide feedback at the December 2024 board.

6.2 Respond to follow-up surveys emailed to members

6.3 Continue engaging with and supporting the strategy process

Rachael Murphy  
**SEStran Strategy Manager**  
27<sup>th</sup> November 2024

Appendix:

Updated timeline and programme order can be found in attached excel document.

## Appendices

1. Case for Change
2. Slide deck to be presented at board.

### Background Paper:

1. Implementation of Part 3 (Bus Services) of the Transport (Scotland) Act 2019, Partnership Board Meeting Friday 24<sup>th</sup> September 2021.

<https://sestran.gov.uk/wp-content/uploads/2021/09/2021-09-24-Item-A7-Implementation-of-Part-3-Bus-Services-of-the-Transport-Scotland-Act-2019.pdf>

Policy Implications	The aspiration for a regional bus strategy to facilitate a World Class Bus Service aligns with objectives and actions in SEStran's Regional Transport Strategy and the National Transport Strategy 2.
Financial Implications	SEStran applied to and won £150k from the TS Community Bus Fund in November 2023, to fund the Regional Bus Strategy. Thus, the actions proposed in the report will have no new financial implications, any subsequent proposals will be brought back to the Partnership Board for approval. There is a risk if we do not progress the strategy, that bus becomes too costly for LAs to sufficiently subsidise.
Equalities Implications	The proposed Regional Bus Strategy will support the equalities objectives in the Regional Transport Strategy. Without this work, there is a risk that a key facilitator of equalities is impinged.
Climate Change Implications	The aspiration for a regional bus strategy to facilitate a World Class Bus Service will support and positively impact on SEStran's Climate Change objectives as outlined in the Regional Transport Strategy. Without improving our public transport offering, we risk increased private car use and corresponding worsening climate.



## Climate Change Reporting

### 1 INTRODUCTION

1.1 SEStran is required by the [Climate Change \(Duties of Public Bodies; Reporting Requirements\) \(Scotland\) Order 2015](#) as amended by the [Climate Change \(Duties of Public Bodies; Reporting Requirements\) \(Scotland\) Amendment Order 2020](#) to report greenhouse gas emissions that result from its organisational activities and services. As per the legislation:

- (1) For each year, a listed body must prepare a report on compliance with its climate change duties
- (2) The listed body must send the report to the Scottish Ministers within a period of 8 months from the end of the report year

SEStran, and all other public bodies, previous reports can be found on the [Sustainable Scotland Network's \(SSN\) Reporting](#).

1.2 The purpose of this report is to provide members with a summary of SEStran's carbon emissions for 23/24, explain changes to the previous year, and provide a summary of targets for 2024/25.

### 2 OVERVIEW OF 23/24 TARGETS

2.1 SEStran's emissions from the baseline year (2014/15) to 2023/24 are summarised below. A comparison of 2023/24 to the previous year is included in Appendix 2.

Timeline	Year	Emissions (tCO <sub>2</sub> e)
Baseline Year	2014/15	20.00
Year 1 carbon footprint	2015/16	16.00
Year 2 carbon footprint	2016/17	11.00
Year 3 carbon footprint	2017/18	9.00
Year 4 carbon footprint	2018/19	15.00
Year 5 carbon footprint	2019/20	17.00
Year 6 carbon footprint	2020/21	3.00
Year 7 carbon footprint	2021/22	3.00
Year 8 carbon footprint	2022/23	5.58
Year 9 carbon footprint	2023/24	9.00

2.2 The year saw a 3.42 tCO<sub>2</sub>e increase in emissions compared to the previous year. This is due to:

- Increase of homeworking hours (office equipment + heating) (2.43 tCO<sub>2</sub>e) due to an error in previous reporting. Figure for 23/24 includes all staff hours where staff are working from home.

- Increase in staff travel to work (2.21 tCO<sub>2</sub>e) due to reporting for 22/23 using the wrong CO<sub>2</sub> figures. When comparing the correct figures for both years, figures show a slight decrease in total emissions for staff travel to work in 23/34.
- Addition of hotel stays (0.17 tCO<sub>2</sub>e) which were not previously included in reporting.

2.3 There was a decrease in business travel (mix of short-haul flights, train journeys, and petrol car journeys) (-1.38 tCO<sub>2</sub>e) primarily due to a reduced number of flight passenger kms travelled.

In the wider report for 2022/23, it was highlighted there was an increasing return to pre-pandemic levels of travel, although a major shift to hybrid working and more online meetings are limiting a full-scale rebound.

SEStran has been reviewing in-person and hybrid meetings on a case-by-case basis to ensure journeys are necessary and business needs are met. This is being formalised in 2024/25 via a Business Transport Guide which provides guidance when choosing method of travel.

### 3 TARGETS FOR 24/25

#### 3.1 Climate Change Strategy

3.1.1 SEStran's top five priorities for climate change governance, management and strategy for the year ahead are as follows:

1. Review all relevant policies on an annual basis and create a process for selecting the best method of staff business travel to support more sustainable journeys being planned.
2. Review performance against carbon targets every quarter.
3. Promoting the current facilities available on site to enable staff and visitors to travel sustainably to Victoria Quay (cycle parking, changing facilities). Due to the small size of the organisation (11-12 people), this has a relatively low impact. The topic can be added to people's PDP conversations to offer more support and/or encouragement to travel to work sustainably (inc. Cycle Friendly Employer Scheme).
4. Create a process to ensure travel to meetings is justified (determining whether meetings should be remote, hybrid or in-person only). Investigate the feasibility of certain board meetings being online only.
5. Promote ability to reclaim travel expenses to encourage public transport being utilised by staff and board members and reduce the reliance on private vehicles.

3.1.2 In addition to these five priorities, we will be reviewing our procurement process to identify areas where sustainability could be prioritised further.

#### 3.2 Climate Change Adaptation

3.2.1 In addition to strategy priorities, SEStran have developed five priorities specifically targeting climate change adaptation. Due to the organisation’s small size (currently 12 employees), our internal influence is limited, however, we are committed to integrate climate change adaptation in relevant regional policies and discussions. Our priorities for 2023/24 are as follows:

1. Ensuring data is current to allow decision making on climate risk to be evidence based.
2. Hold session with team using the climate change adaptation tool (CCAT) to allow for better self-assessment of our impact and identify areas of improvement.
3. Continuing to develop flexible working for business but also to enable continuity for adverse weather and incorporation of the Scottish Government Adverse Weather Charter.
4. We are reviewing online document management and storage structures to ensure effective team working in the event of staff being unable to access the workplace for a long period of time.
5. Being proactive in changing policies to support climate change adaptation.

#### 4 CONCLUSION

4.1 SEStran’s climate change emissions increased in the year 2023/24, however, this was accounted for by an increase in staff travel to work and the inclusion of other emission factors. The priorities set out in 3.1 and 3.2 aim to reduce the organisation’s emissions, both internally and in wider regional work.

Rebecca Smith  
**Project Officer**  
 28<sup>th</sup> November 2024

Policy Implications	This report is part of SEStran’s statutory duty to report on climate change.
Financial Implications	There are no direct financial implications of this report. The actions for 24/25 may result in higher costs (i.e. train fares being higher than flights) but this has been accounted for with a cost-time matrix.
Equalities Implications	The project does not require an Equalities Impact Assessment (EQIA).
Climate Change Implications	The reporting provides a comprehensive overview of SEStran’s 23/24 emissions as well as a plan for reducing emissions in 24/25.
Appendices	<ol style="list-style-type: none"> <li>1. Public Bodies Climate Change Duties South East Scotland Transport Partnership 2023-24</li> <li>2. Data Comparison of 23/23 and 23/24 emissions</li> </ol>



Background Papers	N/A
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## Public Bodies Climate Change Duties Compliance Reporting **Financial Year** Template 2023/24

### 1. Overview

This template is provided for public bodies required to report annually in accordance with the Climate Change (Duties of Public Bodies Reporting Requirements) (Scotland) Order 2015, as amended by the Climate Change (Duties of Public Bodies: Reporting Requirements) (Scotland) Amendment Order 2020 which took effect for reporting periods commencing on or after 1 April 2021.

Reports must be submitted to [ccreporting@ed.ac.uk](mailto:ccreporting@ed.ac.uk) by 30th November. Late submissions will not be accepted for analysis and may be deemed non-compliant with Public Bodies Duties reporting requirements.

### 2. Guidance

1. Please **do not delete any cells, rows or columns**. This may corrupt the template/data and compromise analysis. You can hide any extra rows within tables.

2. Please complete the new "Boundary info" tab. This will enable improved assessment of data coverage and inform SSN analysis.

3. The "Profile of Body" tab must be completed before proceeding to add any other data.

4. To ensure that the correct emission factors are applied please ensure that you are using the correct template for the reporting year type under Q1f. If your organisation reports according to the academic year, usually August to July, you must use the Academic Year template.

5. If you need to add more rows in any table please email the file to [ccreporting@ed.ac.uk](mailto:ccreporting@ed.ac.uk)

6. In Q3b emissions sources can be filtered by type in Column C. The list of available factors is visible on the Emission Factors tab. Please do not edit this list, use "other" if an EF is not available.

7. Only use the "other" rows when there is no relevant emission source available in the dropdown list or if you have bespoke data/emission factors. Please provide a brief explanation in the comment.

8. Water supply and treatment (sewage) emission factors are based on Scottish Water's carbon intensities for service supply. If you wish to use UK factors you need to enter manually in an "Other" row.

9. More detailed guidance is available on the SSN website

### 3. Colour Coding used in the template

	Dropdown box - select from list of options
	Uneditable/fixed entry cell
	Editable cell



## Public Bodies Climate Change Duties Compliance Reporting Template 2023/24 FY

Please answer all questions below with respect to the public body's reporting boundary for the reporting period.  
The information is intended to improve data coverage and inform analysis, in particular, to help identify data gaps.  
There are 3 response options:

- YES - where data is available and is reported
- NA - where a category is relevant but no data is available
- NO - the category is not relevant

Any points of clarification can be added in the comments field for the corresponding emission source(s) in Table 3b on the Emissions tab.

Category		Select from dropdown list
Owned estate	Are any buildings owned by the public body?	No
Managed services	Are building services managed on behalf of another public body that shares or leases space?	No
Leased premises	Are building services managed and provided by another public body?	Yes
Streetlighting	Are streetlights owned or operated?	No
Fleet and equipment	Are any vehicles or fossil-fueled machinery or equipment owned or leased, excludes short-term or infrequent hires?	No
Refrigerants/F-gases	Are there any air conditioning or refrigeration systems that require refrigerant gas top-ups?	No
Medical gases	Are medical gases used?	No
Business travel - private	Do staff undertake business travel by private car?	Yes
Business travel - flights	Do staff undertake any business travel by plane?	Yes
Homeworking	Do staff work from home - including hybrid?	Yes
Supply chain	Are any goods or services purchased?	Yes
Land use	Are more than 10 hectares of land owned or managed for public services provision, including for research or recreation?	No
Waste services	Is the public body responsible for collecting household or municipal waste?	No

**PART 1 Profile of Reporting Body**

**1a Name of reporting body**

Provide the name of the listed body (the "body") which prepared this report.

South East of Scotland Transport Partnership (SEStran)

**1b Type of body**

Select from the options below

Transport Partnerships

**1c Highest number of full-time equivalent staff in the body during the report year**

11

**1d Metrics used by the body**

Specify the metrics that the body uses to assess its performance in relation to climate change and sustainability.

Metric	Units	Value	Comments
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Please select from drop down box			
Other (please specify in comments)			
Other (please specify in comments)			
Other (please specify in comments)			
Other (please specify in comments)			
Other (please specify in comments)			
Other (please specify in comments)			
Other (please specify in comments)			

**1e Overall budget of the body**

Specify approximate £/annum for the report year.

Budget	Budget Comments
£972,000	The net revenue budget of the Partnership in 2023/24 was £0.972m.

**1f Report type**

**Check the report year type is correct. The alternative template must be used for academic year reporting.**

Reporting type	Report year comments
Financial/Calendar/Other	

**1g Context**

Provide a summary of the body's nature and functions that are relevant to climate change reporting.

SEStran is the statutory Regional Transport Partnership for the South East of Scotland, covering 8 local authority areas: Edinburgh, East Lothian, West Lothian, Midlothian, Falkirk, Clackmannanshire, Scottish Borders and Fife. SEStran's statutory requirement is to produce a Regional Transport Strategy, and it works with partners to realise the strategy, delivering transport projects with a strong focus on reducing transport related emissions by getting people out of their cars and using sustainable transport. In 2023/24, the partnership developed regional strategic approaches to sustainable transport including electric vehicles, freight, and public transport across the region. SEStran developed the People and Place Plan for Active Travel Behaviour Change in the latter part of 2023/24, and this is now being implemented in 2024/25.

**PART 2 Governance, Management and Strategy**

**Governance and management**

**2a How is climate change governed in the body?**

Provide a summary of the roles performed by the body's governance bodies and members in relation to climate change. If any of the body's activities in relation to climate change sit outside its own governance arrangements (in relation to, for example, land use, adaptation, transport, business travel, waste, information and communication technology, procurement or behaviour change), identify these activities and the governance arrangements. Provide a diagram / chart to outline the governance structure within the body.

SEStran governs its climate change impact through the following measures:  
 Documentation: The climate change reporting contained within this report is utilised for reporting requirements.  
 Review: SEStran holds a quarterly Performance & Audit Committee which provides scrutiny of the organisation's performance and activities. The annual climate change report is reported to the Performance & Audit Committee, and to the Partnership Board for scrutiny and approval (SEStran's Partnership Board consists of Elected Members and Non-Councillor members). SEStran's Business Plan is approved annually by the Partnership Board.

**2b How is climate change action managed and embedded in the body?**

Provide a summary of how decision-making in relation to climate change action by the body is managed and how responsibility is allocated to the body's senior staff, departmental heads etc. If any such decision-making sits outside the body's own governance arrangements (in relation to, for example, land use, adaptation, transport, business travel, waste, information and communication technology, procurement or behaviour change), identify how this is managed and how responsibility is allocated outside the body. Provide a diagram to show how responsibility is allocated to the body's senior staff, departmental heads etc.

We plan to review all relevant policies on an annual basis as well as working on our top priorities for climate change governance and adaptation throughout the year.  
 We plan to host an annual team event to:  
 • Discuss performance against targets etc.  
 • Improvements for the following year  
 • Refresher training on policies, especially Business Continuity Plan  
 Following on from this work, we will also be reporting performance to the SEStran Board.

**Strategy**

**2c Does the body have specific climate change mitigation and adaptation objectives in its corporate plan or similar document?**

Provide a brief summary of objectives if they exist.

Wording of objective	Name of document	Document Link
To ensure SEStran contributes to achieving Scotland's target of 'net zero' carbon emissions by 2045, and meet intervening targets, and UK obligations regarding greenhouse gas emissions	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To minimise the negative impacts of transport on natural and cultural resources	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To promote more sustainable travel	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To reduce the need for travel	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To increase transport choices, reducing dependency on private cars	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To reduce car dependency for commuting purposes, particularly single occupancy cars	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>
To seek to reduce our carbon emissions & positively influence other regional stakeholders	Business Plan 2021/24	<a href="https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf">https://sestran.gov.uk/wp-content/uploads/2021/08/2021-24-Business-Plan-FINAL.pdf</a>

**2d Does the body have a climate change plan or strategy?**

If yes, provide the name of any such document and details of where a copy of the document may be obtained or accessed.

SEStran do not currently have a separate document detailing a climate change plan/strategy. We will work to deliver a climate change plan within the calendar year.

**2e Does the body have any plans or strategies covering the following areas that include climate change?**

Provide the name of any such document and the timeframe covered.

Topic area	Name of document	Link	Time period covered	Comments
Adaptation	Adverse Weather Policy		2019 - present	
	Business Continuity Plan		2024 - present	
Business travel	Business Travel Policy	<a href="http://sestran.gov.uk/wp-content/uploads/2016/07/SEStran-Busin">http://sestran.gov.uk/wp-content/uploads/2016/07/SEStran-Busin</a>	2021 - present	Business Travel Hierarchy to be expanded
	Hybrid Working Policy		2021 - present	
Staff Travel	Home Working Policy	<a href="https://sestran.gov.uk/wp-content/uploads/2022/02/SEStran-Hybr">https://sestran.gov.uk/wp-content/uploads/2022/02/SEStran-Hybr</a>	2021 - present	
Energy efficiency				
Fleet transport				
ICT				
Renewable energy				
Sustainable/renewable heat				
Waste management				
Water and sewerage				
Land Use				
Other (please specify in comments)				

**2f What are the body's top 5 priorities for climate change governance, management and strategy for the year ahead?**

Provide a brief summary of the body's areas and activities of focus for the year ahead.

SEStran's top 5 priorities for climate change governance, management and strategy for the year ahead are as follows:  
 1. Review all relevant policies on an annual basis and create a choice process for staff business travel to support more sustainable journeys being planned.  
 2. Review performance against carbon targets every quarter.  
 3. Promoting the current facilities available on site to enable staff and visitors to travel sustainably to Victoria Quay (cycle parking, changing facilities). Due to the small size of the organisation (11-12 people), this has a relatively low impact. The topic can be added to people's PDP conversations to offer more support and/or encouragement to travel to work sustainably (inc. Cycle Friendly Employer Scheme).  
 4. Create a choice process for meetings to ensure travel to meetings is justified (determining whether meetings should be remote, hybrid or in-person only). Investigate the feasibility of certain board meetings being online only.  
 5. Promote ability to reclaim travel expenses to encourage public transport being utilised by staff and board members and reduce the reliance on private vehicles.

**2g Has the body used the Climate Change Assessment Tool (a) or equivalent tool to self-assess its capability / performance?**

If yes, please provide details of the key findings and resultant action taken.

(a) This refers to the tool developed by Resource Efficient Scotland for self-assessing an organisation's capability / performance in relation to climate change.

Questions from the CCAT tool have been considered when discussing climate change as an organisation. A formal assessment has not been completed due to the size of the organisation. However, this is a tool we will look to utilise to ensure we are considering our scope and ambitions.

**Further information**

**2h Supporting information and best practice**

Provide any other relevant supporting information and any examples of best practice by the body in relation to governance, management and strategy.

SEStran supports reducing carbon emissions, through the implementation of a number of policies including:  
 Flexible Working Policy: This policy allows staff to travel outwith peak hours, thereby reducing our contribution to congestion.  
 Home Working Policy: This policy encourages a decrease in staff travel emissions.  
 Business Travel Policy: This policy aims to encourage employees to reduce unnecessary travel and encourage the use of more sustainable forms of transport.  
 Hybrid Working Policy: This policy facilitates permanent remote working reducing the need to travel to office base.  
  
 We have been in discussions through the year with other RTPs to ensure learnings are shared, and there's consistency in reporting where relevant. We completed a peer review of this year's report with the other RTPs in November.

**PART 3 Corporate Emissions, Targets and Project Data**

**Emissions**

**3a Emissions from the start of the year which the body uses as a baseline (for its carbon footprint) to the end of the report year**  
 Complete the following table using the greenhouse gas emissions total for the body calculated on the same basis as for its annual carbon footprint / management reporting or, where applicable, its sustainability reporting. Include greenhouse gas emissions from the body's estate and operations (a) (measured and reported in accordance with Scopes 1 & 2 and, to the extent applicable, selected Scope 3) of the Greenhouse Gas Protocol (b). If data is not available for any year from the start of the baseline year to the end of the report year, provide an explanation in the comments column.

(a) No information is required on the effect of the body on emissions which are not from its estate and operations.

(b) This refers to "the greenhouse gas protocol. A corporate accounting and reporting standard (revised edition)", World Business Council for Sustainable Development, Geneva, Switzerland / World Resources Institute, Washington DC, USA (2004), ISBN: 1-56973-568-9.

**SELECT APPROPRIATE BASELINE YEAR. TOTAL EMISSIONS IN THE MOST RECENT FOOTPRINT YEAR IN THIS QUESTION SHOULD EQUAL TOTAL EMISSIONS IN Q18**

Reference year	Year	Year type	Scope 1	Scope 2	Scope 3	Total	Units	Comments
Baseline year	2014/15	Financial/Calendar/Other				20.00	20.00 tCO <sub>2</sub> e	
Year 1 carbon footprint	2015/16	Financial/Calendar/Other				16.00	16.00 tCO <sub>2</sub> e	
Year 2 carbon footprint	2016/17	Financial/Calendar/Other				11.00	11.00 tCO <sub>2</sub> e	
Year 3 carbon footprint	2017/18	Financial/Calendar/Other				9.00	9.00 tCO <sub>2</sub> e	
Year 4 carbon footprint	2018/19	Financial/Calendar/Other				15.00	15.00 tCO <sub>2</sub> e	
Year 5 carbon footprint	2019/20	Financial/Calendar/Other				17.00	17.00 tCO <sub>2</sub> e	
Year 6 carbon footprint	2020/21	Financial/Calendar/Other				3.00	3.00 tCO <sub>2</sub> e	
Year 7 carbon footprint	2021/22	Financial/Calendar/Other				3.00	3.00 tCO <sub>2</sub> e	
Year 8 carbon footprint	2022/23	Financial/Calendar/Other				5.58	5.58 tCO <sub>2</sub> e	
Year 9 carbon footprint	2023/24	Financial/Calendar/Other				9.00	9.00 tCO <sub>2</sub> e	

**3b Breakdown of emissions sources**

Please refrain from deleting rows or columns anywhere in this template. This workbook is password protected to prevent this and should not be unlocked. Complete the following table with the breakdown of emissions sources from the body's most recent carbon footprint (greenhouse gas inventory), this should correspond to the last entry in the table in 3(a) above. Use the 'Comments' column to explain what is included within each category of emission source entered in the first column. If there is no data consumption available for an emission source enter the emissions in tCO<sub>2</sub>e in the 'Consumption' column of one of the 'Other' rows and assign the scope and an emission factor of 1.

(a) Emission factors are published annually by the UK Department for Energy Security & Net Zero

**Emission Factor Year**  
2023

You can filter emission sources by "type" in column C to enable quicker selection of emission sources in column D. See the list in the Emissions Tab. User defined emission sources can be entered in rows 131 onwards. Please only use these if you cannot find a relevant emission source in the dropdown list or you have a bespoke emission factor or non-standard derivation of emissions e.g. based on a survey/consumption data. If you require extra rows in the table please send the template to ccorporating@ed.ac.uk.

Emission type	Emission source	Scope	Consumption data	Units	Emission factor	Units	Emissions (tCO <sub>2</sub> e)	Comments
Transport - public	Flights - Domestic, to/from UK - Average passenger	Scope 3	2,414	passenger km	0.27758	kg CO <sub>2</sub> e/passenger km	0.66921	
Transport - public	Flights - Short-haul, to/from UK - Average passenger	Scope 3	3,812	passenger km	0.09163	kg CO <sub>2</sub> e/passenger km	0.34924	
Transport - public	National rail	Scope 3	8,137	passenger km	0.09146	kg CO <sub>2</sub> e/passenger km	0.74429	
Transport - car	Average car - Petrol	Scope 3	2,649	km	0.16191	kg CO <sub>2</sub> e/km	0.42819	
Transport - public	Local bus (incl London)	Scope 3	3	passenger km	0.11336	kg CO <sub>2</sub> e/passenger km	0.00040	
Transport - public	Regular taxi	Scope 3	3	passenger km	0.16191	kg CO <sub>2</sub> e/passenger km	0.00048	
Transport - public	LMT rail and tram	Scope 3	5	passenger km	0.09163	kg CO <sub>2</sub> e/passenger km	0.00045	
Homeworking	Homeworking (office equipment + heating)	Scope 3	7,354	hrs Working Hour	0.31178	kg CO <sub>2</sub> e/hrs Working Hour	2.44134	
Hotel stay	Hotel stay - UK	Scope 3	16	Room per night	10.40000	kg CO <sub>2</sub> e/Room per night	0.16640	
Electricity	Transmission and distribution - Electricity UK	Scope 1					0.00000	No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran
Water	Water treatment	Scope 3					0.00000	No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran
Waste	Commercial and industrial waste - Combustion	Scope 3					0.00000	No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran
Waste	Mixed dry recyclates - Recycled	Scope 3					0.00000	No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran
Waste	Paper and board- mixed - Recycled	Scope 3					0.00000	No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran
Staff travel to work	Other (please specify in comments)	Scope 3	16,831	Distance km			2.05411	Staff travel to work - previously recorded as 0.000

**3c Generation, consumption and export of renewable energy**

Provide a summary of the body's annual renewable generation (if any), and whether it is used or exported by the body.

Technology	Renewable Electricity		Renewable Heat		Comments
	Total consumed by the body (kWh)	Total exported (kWh)	Total consumed by the body (kWh)	Total exported (kWh)	
Please select from drop down box					

**Targets**

**3d Organisational targets**

List all of the body's targets of relevance to its climate change duties. Where applicable, targets for reducing indirect emissions of greenhouse gases, overall carbon targets and any separate land use, energy efficiency, waste, water, information and communication technology, transport, travel and fleet targets should be included. Where applicable, you should also provide the body's target date for achieving zero direct emissions of greenhouse gases, or such other targets that demonstrate how the body is contributing to Scotland achieving its emissions reduction targets.

Name of target	Type of target	Target	Units	Boundary/scope of target	Year used as baseline	Baseline figure	Units of baseline	Target completion year	Progress against target	Comments
Reduction in total CO <sub>2</sub> produced by redel	Percentage	50 total % reduction	Percentage	Transport	2015/16		7 tCO <sub>2</sub> e		Please select from drop down box	2030/31 completion target. 2023/24 flights etc.

**3e How will the body align its spending plans and use of resources to contribute to reducing emissions and delivering its emission reduction targets?**

Provide any relevant supporting information that is not already included elsewhere in this report.

Ensuring travel taken is required and taken in the most cost and emission efficient mode through our business travel choice process being developed.

**3f How will the body publish, or otherwise make available, its progress towards achieving its emissions reduction targets?**

Provide any other relevant supporting information. In the event that the body wishes to refer to information already published, provide information about where the publication can be accessed.

Simply referencing this report or it's availability on the SEStran website is insufficient information. SEStran will update the Partnership Board in annual meetings to publish the progress in achieving the emission reduction target, which is updated via the meeting page on the SEStran website.

**Projects and changes**

**3g Estimated total annual carbon savings from all projects implemented by the body in the report year**

If no projects were implemented against an emissions source, enter "0". If the body does not have any information for an emissions source, enter "unknown". If the body does not include the emissions source in its carbon footprint, enter "N/A".

Emissions source	Total estimated annual carbon savings (tCO <sub>2</sub> e)	Comments
Electricity		
Natural gas		
Other heating fuels		
Waste		
Water and sewerage		
Travel		
Fleet Transport		
Other (please specify in comments)		
<b>Total</b>		

**3h Detail the top 10 carbon reduction projects to be carried out by the body in the report year**

Provide details of the 10 projects which are estimated to achieve the highest carbon savings during report year.

Project name	Funding source	First full year of CO <sub>2</sub> e savings	Are these savings figures estimated or actual?	Capital cost (£)	Operational cost (£/annum)	Project lifetime (years)	Primary fuel/emission source saved	Estimated carbon savings per year (tCO <sub>2</sub> e/annum)	Estimated costs savings (£/annum)	Behaviour Change	Comments
		Please select from drop down box	Please select from drop down box				Please select from drop down box			Please select from dropdown box	

**3i Estimated decrease or increase in the body's emissions attributed to factors (not reported elsewhere in this form) in the report year**

If the emissions increased or decreased due to any such factor in the report year, provide an estimate of the amount and direction.

Emissions source	Total estimated annual emissions (tCO <sub>2</sub> e)	Increase or decrease in emissions	Comments
Estate changes		Please select from drop down box	
Service provision		Please select from drop down box	
Staff numbers		Please select from drop down box	
<b>Total</b>			

**3j Anticipated annual carbon savings from all projects implemented by the body in the year ahead**

If no projects are expected to be implemented against an emissions source, enter "0". If the organisation does not have any information for an emissions source, enter "unknown". If the organisation does not include the emissions source in its carbon footprint, enter "N/A".

Emissions source	Total estimated annual carbon savings (tCO <sub>2</sub> e)	Comments
Electricity		
Natural gas		
Other heating fuels		
Waste		
Water and sewerage		
Travel	2	Business travel plan and sustainable transport hierarchy expected to reduce carbon emissions from staff travel.
Fleet Transport		
Other (please specify in comments)		
<b>Total</b>	2	

**3k Estimated decrease or increase in emissions from other sources in the year ahead**

If the body's corporate emissions are likely to increase or decrease for any other reason in the year ahead, provide an estimate of the amount and direction.

Emissions source	Total estimated annual emissions (tCO <sub>2</sub> e)	Increase or decrease in emissions	Comments
Estate changes		Please select from drop down box	
Service provision		Please select from drop down box	
Staff numbers	1	Increase	Increased number of staff to 12 which will increase travel emissions
<b>Total</b>	1		

**3l Total carbon reduction project savings since the start of the year which the body used as a baseline for its carbon footprint**

If the body has data available, estimate the total emissions savings made from projects since the start of that year ("the baseline year").

Total savings	Total estimated emissions savings (tCO <sub>2</sub> e)	Comments
Total project savings since baseline year		

**Further information**

**3m Supporting information and best practice**

Provide any other relevant supporting information and any examples of best practice by the body in relation to corporate emissions, targets and projects.

**PART 4 Adaptation - please do not include information in this part on measures that solely reduce emissions with no implications for climate adaptation. These are climate mitigation measures which should be**

**Assessing and managing risk**

**4a Has the body assessed current and future climate-related risks?**

If yes, provide a reference or link to any such risk assessment(s).

No, a risk assessment focused on climate change has not been completed exclusively for our internal climate risks. However, we have a business continuity plan which details how we would expect to continue operating under different conditions. Our internal risk register includes climate risks in carrying out our day-to-day operations.

**4b What arrangements does the body have in place to manage climate-related risks?**

Provide details of any climate change adaptation strategies, action plans and risk management procedures, and any climate change adaptation policies which apply across the body.

SEStran's Adverse Weather Policy accounts for bad weather circumstances and how officers could be expected to continue working to meet business needs.

**Taking action**

**4c What action has the body taken to adapt to climate change?**

Include details of work to increase awareness of the need to adapt to climate change and build the capacity of staff and stakeholders to assess risk and implement action. The body may wish to make reference to the Scottish Climate Change Adaptation Programme ("the Programme").

SEStran have considered adaptation measures through the following policies:  
 Flexible Working Policy: This policy allows staff to travel outwith peak hours, thereby reducing our contribution to congestion.  
 Home Working Policy: This policy encourages a decrease in staff travel emissions. It also allows business to continue in bad weather events.  
 Business Travel Policy: This policy aims to encourage employees to reduce unnecessary travel and encourage the use of more sustainable forms of transport.  
 Hybrid Working Policy: This policy facilitates permanent remote working reducing the need to travel to office base.

**4d Where applicable, what contribution has the body made to helping deliver the Programme?**

Provide any other relevant supporting information

N/A

**Review, monitoring and evaluation**

**4e What arrangements does the body have in place to review current and future climate risks?**

Provide details of arrangements to review current and future climate risks, for example, what timescales are in place to review the climate change risk assessments referred to in Question 4(a) and adaptation strategies, action plans, procedures and policies in Question 4(b).

We are working towards the climate change adaptation measures set out in 4g. Alongside this, we are going to utilise the toolkits provided and review quarterly. We also include climate change adaptation within our internal risk register and the Business Continuity Plan.

**4f What arrangements does the body have in place to monitor and evaluate the impact of the adaptation actions?**

Please provide details of monitoring and evaluation criteria and adaptation indicators used to assess the effectiveness of actions detailed under Question 4(c) and Question 4(d).

A quarterly review of our targets is being completed in 2024/25 to monitor our progress.

**Future priorities for adaptation**

**4g What are the body's top 5 climate change adaptation priorities for the year ahead?**

Provide a summary of the areas and activities of focus for the year ahead.

1. Ensuring data is current to allow decision making on climate risk to be evidence based.
2. Hold session with team using the climate change adaptation tool (CCAT) to allow for better self-assessment of our impact and identify areas of improvement.
3. Continuing to develop flexible working for business but also to enable continuity for adverse weather and incorporation of the Scottish Government Adverse Weather Charter.
4. We are reviewing online document management and storage structures to ensure effective team working in the event of staff being unable to access the workplace for a long period of time.
5. Being proactive in changing policies to support climate change adaptation.

**Further information**

**4h Supporting information and best practice**

Provide any other relevant supporting information and any examples of best practice by the body in relation to adaption.

We are attending the Climate Ready Infrastructure forum, led by Network Rail, which has shared best practice and examples of organisation's integrating climate change adaptation measures into their work. SEStran have presented current progress and this has led to further discussion and learnings with other organisations.

**PART 5 Procurement**

**5a How have procurement policies contributed to compliance with climate change duties?**

Provide information relating to how the procurement policies of the body have contributed to its compliance with climate changes duties.

Procurement contract awards will be notified on Public Contracts Scotland as appropriate, and all procured contracts and values are reported annually to the Partnership’s Performance and Audit Committee and the Partnership Board, as part of the Public Services Reform (Scotland) Act 2010 duties. In awarding any tender, SEStran officers will comply with the General Duties of the Procurement Reform (Scotland) Act 2014, and, if applicable, The Public Contracts (Scotland) Regulations 2015, and the Sustainable Procurement Duty outlined within the 2014 Act. This will be done in a proportionate way but applied to all regulated procurements undertaken by SEStran. Compliance with the general duties and sustainable procurement duties have aided compliance with the Equality Act, specific Scottish duties, and the Climate Change Act 2009.

**5b How has procurement activity contributed to compliance with climate change duties?**

Provide information relating to how procurement activity by the body has contributed to its compliance with climate changes duties.

All procurement activities undertaken by SEStran are managed through the SEStran Contract Standing Orders noted in the policy context above. These are subject to the over-riding provisions of the United Kingdom and Scottish legislation; including the Regulations.

**Further information**

**5c Supporting information and best practice**

Provide any other relevant supporting information and any examples of best practice by the body in relation to procurement.



## Public Sector Report on Compliance with Climate Change Duties 2024 Template

### PART 6 Validation and Declaration

**6a Internal validation process**

Briefly describe the body's internal validation process, if any, of the data or information contained within this report.

This report will be validated internally by SEStran employees, taken to the Partnership Director, and then taken to the Partnership Board for approval.

**6b Peer validation process**

Briefly describe the body's peer validation process, if any, of the data or information contained within this report.

The report content and target were discussed at high-level sense check in a peer group with fellow Regional Transport Partnership across Scotland in November.

**6c External validation process**

Briefly describe the body's external validation process, if any, of the data or information contained within this report.

N/A

**6d No Validation Process**

If any information provided in this report has not been validated, identify the information in question and explain why it has not been validated.

N/A

**6e Declaration**

I confirm that the information in this report is accurate and provides a fair representation of the body's performance in relation to climate change.

<b>Name:</b>	Brian Butler
<b>Role in the body:</b>	Partnership Director
<b>Date:</b>	26/11/2024 <span style="color: red;">Date in format (dd/mm/yyyy)</span>

Recommended Reporting: Reporting on Wider Influence

Wider Impact and Influence on GHG Emissions

**Q1) Historic Emissions (Local Authorities Only) \*\*\*\*The latest dataset is not available. If you wish to include area emissions in the report a separate tab will be posted on the SSN website after DESNZ publishes the dataset, late June/early July.\*\*\*\***

Please indicate emission amounts and unit of measurement (e.g. tCO<sub>2</sub>e) and years. Please provide information on the following components using data from the links provided below. Please use (1) as the default unless targets and actions relate to (2).  
**Please note : territorial emissions of carbon dioxide (CO<sub>2</sub>), methane (CH<sub>4</sub>) and nitrous oxide (N<sub>2</sub>O) are provided, but not fluorinated gases, which are also included in the UK territorial greenhouse gas emissions statistics. Prior to the 2005 to 2020 publication the statistics covered emissions of carbon dioxide only**  
 (1) UK local and regional CO<sub>2</sub>e emissions: **subset dataset** (emissions within the scope of influence of local authorities);  
 (2) UK local and regional CO<sub>2</sub>e emissions: **full dataset**:  
<https://data.gov.uk/dataset/723c-243d-2f1a-4d77-8b61-c0b93e5b10ff/emissions-of-carbon-dioxide-for-local-authority-areas>

Local Authority (Please State)	DESNZ Dataset (full or sub-set)	Source	Sector	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Units	Comments
		DESNZ Sectors	Total Emissions													ktCO <sub>2</sub> e	
			Industry and Commercial													ktCO <sub>2</sub> e	
			Domestic													ktCO <sub>2</sub> e	
			Transport total													ktCO <sub>2</sub> e	
			Per Capita													ktCO <sub>2</sub> e	
		Other Sectors	Please select from drop down box													Please select from drop down	
			Please select from drop down box													Please select from drop down	
			Please select from drop down box													Please select from drop down	
			Please select from drop down box													Please select from drop down	
			Please select from drop down box													Please select from drop down	

**2a) Targets**  
Please detail your wider influence targets

Sector	Description	Type of Target (units)	Baseline value	Start year	Target	Target/End year	Saving in latest year measured	Latest Year Measured	Comments
Transport	Transport emissions in the SEStran region (Department for Business, Energy & Industrial Strategy)	Absolute (tCO <sub>2</sub> )	2678.6	2019		2035		2021	
Transport	Car kilometres in the SEStran region (Scottish Transport Statistics)	Other (please specify in comments)	13220.0	2019		2035	11721.0	2021	km
Transport	Number of Air Quality Management Areas (Scottish Transport Statistics)	Other (please specify in comments)	16.0	2019		2035	15.0	2021	Number of areas
Transport	Number of road vehicle fleet which is ULEVs (DfT Vehicle Licensing Statistics)	Other (please specify in comments)	3272.0	2019		2035	8168.0	2021	Number of ULEVs
Transport	Main mode of travel – walking (Scottish Household Survey Travel Diary)	Other (please specify in comments)	20.0	2019		2035	30.0	2021	% of survey respondents
Transport	Main mode of travel – bicycle (Scottish Household Survey Travel Diary)	Other (please specify in comments)	2.0	2019		2035	2.0	2021	% of survey respondents
Transport	Main mode of travel – bus (Scottish Household Survey Travel Diary)	Other (please specify in comments)	9.0	2019		2035	5.0	2021	% of survey respondents
Transport	Main mode of travel – rail (Scottish Household Survey Travel Diary)	Other (please specify in comments)	2.0	2019		2035	1.0	2021	% of survey respondents

**2b) Does the organisation have an overall mission statement, strategies, plans or policies outlining ambition to influence emissions beyond your corporate boundaries? If so, please detail this in the box below.**

SEStran published the Regional Transport Strategy (RTS) in 2023 which maps out the partnership's key ambitions and objectives for the region until 2035. The strategy sets out the key transport challenges in the area and how SEStran proposes to respond to them.

Within the RTS, the following objectives aim to influence the regional population:  
 Strategy Objective 1 (Transitioning to a sustainable, post-carbon transport system) this includes addressing climate change and net zero ambitions.  
 Strategy Objective 4 (Supporting safe, sustainable and efficient movement of people and freight across the region), the strategy addresses climate change adaptation.

The monitoring of the RTS creates KPIs in which the four objectives of the RTS can be measured. Relevant targets linked to climate change strategy and adaptation are noted above.

The RTS now being developed via a delivery plan. The Regional Transport Strategy Delivery Plan will provide a mechanism to assess and prioritise regional projects that are required over the next ten years. It will realise the ambitions of the Regional Transport Strategy and support the economic and net-zero ambitions of the Regional Prosperity Framework. One of the key ambitions of the framework is to support the Climate Adaptation & Resilience Plan / Nature Recovery Plan / Challenge Fund. There are 10 projects currently mapped out which are addressing climate change adaptation. This includes Local Flood Risk Management Plans, using technology to monitor transport infrastructure in extreme weather, developing a climate change adaptation action plan, and setting out our approach to protecting the transport network from the effects of extreme weather.

**Q3) Policies and Actions to Reduce Emissions**  
Please detail any of the specific policies and actions which are underway to achieve your emission reduction targets

Sector	Start year for policy/action implementation	Year that the policy/action will be fully implemented	Annual CO <sub>2</sub> saving once fully implemented (tCO <sub>2</sub> )	Latest Year measured	Saving in latest year measured (tCO <sub>2</sub> )	Status	Metric/indicators for monitoring progress	Delivery Role	During project/policy design and implementation, has ISM or an equivalent behaviour change tool been used?	Please give further details of this behaviour change activity.	Value of Investment (£)	Ongoing Costs (£/year)	Primary Funding Source for Implementation of Policy/Action	Comments
Please select from drop down box	Please select from drop down box	Please select from drop down box		Please select from drop down box		Please select from drop down box		Please select from drop down box	Please select from drop down box				Please select from drop down box	

Please provide any detail on data sources or limitations relating to the information provided in Table 3

**Q4) Partnership Working, Communications and Capacity Building**  
Please detail your Climate Change Partnership, Communication or Capacity Building Initiatives below.

Key Action Type	Description	Organisation's project role	Lead Organisation (if not reporting organisation)	Private Partners	Public Partners	3rd Sector Partners	Outputs	Comments
Partnership Working	Involvement in the RTP peer review of the PBCCD reporting to share knowledge and learnings.	Participant	RTPs				Peer-reviewed PBCCD	
Capacity Building (ie. staff training and development initiatives)	GIS mapping staff training	Participant	Jacobs				Knowledge of mapping systems which can be discussed in forward planning (particularly in relation to the City Region Deal and transport planning)	
Partnership Working	Attendance at the Climate Change Infrastructure Forum	Participant	Network Rail	Multiple	Multiple	Multiple	The forum has provided information on: -best practice (particularly from larger organisations that manage large-scale infrastructure) -presenting SEStran's progress to enable peer-review and advice	

**Other Notable Reportable Activity**

Q5) Please detail key actions relating to Food and Drink, Biodiversity, Water, Procurement and Resource Use in the table below

Key Action Type	Key Action Description	Organisation's Project Role	Impacts	Comments
Please select from drop down box		Please select from drop down box		

Q6) Please use the text box below to detail further climate change related activity that is not noted elsewhere within this reporting template

## APPENDIX 2

### Comparison of data 2022/23 to 2023/24

Emission factor	2022/23	2023/24	Difference	Explanation
Flights - Domestic, to/from UK - Average passenger	0.00	0.66	0.66	Flight to Orkney
Flights - Short-haul, to/from UK - Average passenger	4.94	2.44	-2.50	Fewer flights carried out and less distance travelled
National rail	0.16	0.29	0.13	More in-person meetings travelled to by train
Average car - Petrol	0.10	0.43	0.33	More in-person meetings travelled to by petrol car
Average car - Diesel	0.00	0.00	0.00	No diesel cars used
Local bus (not London)	0.00	0.00	0.00	More in-person meetings travelled to by bus
Regular taxi	0.00	0.00	0.00	More in-person meetings travelled to by taxi
Light rail and tram	0.00	0.00	0.00	More in-person meetings travelled to by tram
Homeworking (office equipment + heating)	0.03	2.46	2.43	Error in previous reporting
Hotel stay - UK	0.00	0.17	0.17	Hotel stays not included in 22/23 reporting
Transmission and distribution - Electricity: UK	0.00	0.00	0.00	N/A*
Water treatment	0.00	0.00	0.00	N/A*
Commercial and industrial waste - Combustion	0.00	0.00	0.00	N/A*
Mixed dry recyclates - Recycled	0.00	0.00	0.00	N/A*
Paper and board: mixed - Recycled	0.00	0.00	0.00	N/A*
Staff travel to work	0.34	2.55	2.21	Incorrect reporting in previous year
<b>TOTAL</b>	<b>5.58</b>	<b>9.00</b>	<b>3.42</b>	Error in previous reporting

Business travel combined	5.20	3.82	-1.38	
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\*No emissions recorded due to organisation working out of Scottish Government building. This would mean the emissions are double reporting, and the emissions are unknown due to the low % of the building occupied by SEStran.

**Programme of Meetings**

**1. INTRODUCTION**

- 1.1 This paper presents the proposed dates for the Partnership Board meetings in 2025, along with the full schedule of SEStran meetings contained in **Appendix 1** of the report.
- 1.2 The schedule has been drafted in line with previous meeting cycles and complies with audit reporting requirements.

**2. PROPOSED MEETING DATES**

- 2.1 The proposed dates for the Partnership Board are:
  - Friday 14th March 2025
  - Friday 20th June 2025
  - Friday 26th September 2025
  - Friday 5th Dec 2025
- 2.2 Members should note that the Partnership Board and the Performance and Audit Committee will be held as hybrid meetings, unless agreed otherwise. These meetings will take place in person at the City Chambers, Edinburgh or via Microsoft Teams. The remaining meetings will be held online via Microsoft Teams, again unless there is a requirement for an in-person meeting. To assist with diary management, calendar invites will be issued in advance for all scheduled meetings.

**3. RECOMMENDATIONS**

- 3.1 It is recommended that the Board:
  - 3.1.1 Approves the proposed programme of meetings for 2025
  - 3.1.2 Notes the hosting arrangements for the future meetings.

Angela Chambers  
**Business Manager**  
29 November 2024

**Appendix 1:** Calendar of meetings 2025.

Policy Implications	None
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**ITEM 9. Programme of Meetings 2025**

**APPENDIX 1**

	January	February	March	April	May	June	July	August	September	October	November	December
<b>Partnership Board - 09:30 - 14:00</b>			14/03/2025			20/06/2025			26/09/2025			05/12/2025
<b>Performance &amp; Audit Committee - 13:00 - 15:00</b>		28/02/2025				06/06/2025			12/09/2025		21/11/2025	
<b>Integrated Mobility Forum - 10:00-12:00</b>				24/04/2025						09/10/2025		
<b>Logistics &amp; Freight Forum - 14:00-16:00</b>					29/05/2025						20/11/2025	
<b>Equalities &amp; Access to Healthcare Forum - 10:00-12:00</b>		27/02/2025							25/09/2025			

Financial Implications	Cost of hosting in person meetings which will be contained within approved budgets.
Equalities Implications	Providing meeting options that are accessible for all.
Climate Change Implications	Using meeting venues that have hybrid meeting facilities, good public transport links and central locations.

Performance & Audit Committee	Friday 28 <sup>th</sup> Feb 25	1pm	City Chambers/Hybrid
Partnership Board	Friday 14 <sup>th</sup> Mar 25	10am	City Chambers/Hybrid
Performance & Audit Committee	Friday 6 <sup>th</sup> Jun 25	1pm	City Chambers/Hybrid
Partnership Board	Friday 20 <sup>th</sup> Jun 25	10am	City Chambers/Hybrid
Performance & Audit Committee	Friday 12 <sup>th</sup> Sep 25	1pm	City Chambers/Hybrid
Partnership Board	Friday 26 <sup>th</sup> Sep 25	10am	City Chambers/Hybrid
Performance & Audit Committee	Friday 21 <sup>st</sup> Nov 25	1pm	City Chambers/Hybrid
Partnership Board	Friday 5 <sup>th</sup> Dec 25	10am	City Chambers/Hybrid

## **SEStran Consultation Update**

### **Fife Council: Local Development Plan 2**

SEStran is working with Fife Council officers on the transport evidence report for the next LDP which will be submitted by the council in 2025.

### **Midlothian Council: Local Development Plan 2**

SEStran is working with Midlothian Council Officers on high level comments/observations from as a key agency to provide transport feedback on the proposed sites. This is due to be submitted to Midlothian by mid December.

### **East Lothian Council: Local Development Plan 2**

SEStran contributed to the transport evidence for the next LDP highlighting key regional objectives supported by the Regional Transport Strategy.

The full evidence report will be submitted at the 'Gate Check'<sup>1</sup> stage to the reporter appointed by the Scottish Government with the full response to be published on the Council's website with the next steps in the process.

### **Scottish Government: Reducing car use for a healthier, fairer, and greener Scotland: A route map to achieve a 20% reduction in car use by 2030**

The route map<sup>2</sup> is published in response to the Scottish Government's Climate Change Plan update commitment to reduce car kilometres by 20 per cent by 2030, to meet Scotland's statutory obligations for greenhouse gas emissions reduction by 2045. However, it also recognises the benefits that re-thinking the way we travel can have on our individual and community health and well-being, as well as the fairness of our society and the inclusiveness of our economy.

SEStran is working with other Regional Transport Partnerships to draft a joint response to the route map; the draft will be presented to the RTP Chairs meeting in Aberdeen on the 3<sup>rd</sup> of December for discussion with Transport Scotland, following this meeting a submission will be sent to COSLA on behalf of the RTPs.

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<sup>1</sup>

[https://www.eastlothian.gov.uk/info/210547/planning\\_and\\_building\\_standards/12726/ldp2\\_and\\_local\\_place\\_plans/3](https://www.eastlothian.gov.uk/info/210547/planning_and_building_standards/12726/ldp2_and_local_place_plans/3)

<sup>2</sup> <https://www.transport.gov.scot/media/50872/a-route-map-to-achieve-a-20-per-cent-reduction-in-car-kms-by-2030.pdf>



**EQUALITIES AND ACCESS TO HEALTHCARE FORUM**  
10:00am Thursday 26<sup>th</sup> September 2024

**Present:**

Doreen Steele (Chair) (DS)	NCM
Cllr Colin Cassidy (CC)	Midlothian Council
Rhianne Forrest (RF)	Children's Health Scotland
Douglas Bryce (DB)	Disability Equality Scotland
Tony McRae (TMcR)	Fife Council
Anne Cowan (AC)	Fife Council
Kirstie Henderson (KH)	RNIB Scotland
Mark Craske (MC)	NHS Forth Valley
Ewan Doyle (ED)	Scottish Borders Council
Mahdi Saki (MS)	The Mental Health Foundation
Naghat Ahmed (NA) (in place of Linda Bamford)	MACS
Iona Chandler (IC)	Urban Tide
Steven Revill (SR)	Urban Tide
Brian Butler (BB)	SEStran
Keith Fiskin (KF)	SEStran
Michael Melton (MM)	SEStran
Rebecca Smith (RS)	SEStran
Nikki Boath (Minutes) (NB)	SEStran

**Apologies:**

Cllr Margaret Anslow	Falkirk Council
Cllr Jane Cox	Scottish Borders Council
Cllr Jenny Linehan	Scottish Borders Council
Cllr Ian Cameron	Fife Council
Steven Dora	Transport Scotland
Linda Bamford	Non-Councillor Member

Ref.		Actions
<b>1.</b>	<b>WELCOME AND APOLOGIES FOR ABSENCE</b>	
	DS welcomed everyone to the meeting.	
<b>2.</b>	<b>MINUTES FROM WEDNESDAY 29<sup>TH</sup> FEBRUARY 2024</b>	
	The minutes of the last meeting were approved.	
	<u>Actions arising from the minutes of the last meeting</u>	

	Jennifer Watson to send link for the DES Evaluation Report to Rachael Murphy to circulate.  Cllr McMillan to forward his questions to Jennifer Watson directly regarding Blue Badge application process.	<b>JW/RM</b>  <b>Cllr McMillan</b>
<b>3.</b>	<b>TRAVEL TO HEALTHCARE</b>	
	<p>KF provided an update. The key points are:</p> <ul style="list-style-type: none"> <li>• SEStran has engaged with a number of organisations - Health Boards, NHS Assure, Scottish Ambulance Service, Community Transport Association, Youth Scotland and other stakeholder groups. KF stressed the benefits that have arisen from the group meetings as the organisations have had the opportunity to begin to develop ideas.</li> <li>• SEStran has met with health boards every six weeks as a group, giving them the chance to get to know each other and hearing from other projects about local solutions.</li> <li>• From forming this group, SEStran is going to work with health boards to see what opportunities there are to work together on collaborative interventions in the region.</li> </ul>	
<b>4.</b>	<b>RURAL ACCELERATOR PROJECT</b>	
	<p>KF introduced Iona Chandler, Partnership Manager at UrbanTide.</p> <p>IC presented a pilot project which UrbanTide are leading on, in collaboration with SEStran and NHS Scotland Assure for the Rural Transport Innovation Accelerator Project. This pilot will use UrbanTide's AI transport and data modelling to provide insights to Transport to Healthcare journeys.</p> <p>IC explained that the current iteration of the tool is very much a prototype, and that the next step will be detailed consultation with a range of stakeholders to better understand their needs, availability of data etc</p> <p>IC highlighted that the location chosen for the trial was Fife. IC explained the challenges, solutions and objectives in this trial.</p> <p>IC also explained the data and analysis used and the potential outcomes.</p> <p>RF asked if children's data has been specifically looked at. SR said that this has not been done yet.</p> <p>TMcR asked IC if UrbanTide had engaged with Fife Council in this exercise. SR explained that UrbanTide will be contacting Fife Council directly as the next step. TMcR highlighted to SR that he is the Fife Council contact. TMcR will provide SR &amp; IC with RVS contacts for Fife region.</p> <p>KH asked if UrbanTide had looked at "Did Not Attend" data. SR explained that, although there has been research done regarding this data, UrbanTide have not got access to that data yet. SR mentioned that NHS partners are currently looking to obtain this information. However SR highlighted</p>	<b>TMcR</b>

	<p>that due to data protection, it may impossible to access this information.</p> <p>MS provided a link to a report that Mental Health Foundation has conducted.  <a href="#">The journey to wellbeing - Refugees, transport, and mental health   Mental Health Foundation</a></p> <p>MC will contact KH &amp; BB to arrange a meeting to discuss an idea he has had in relation to Do Not Attend transport data. MC will forward a paper to KF &amp; BB to read.</p> <p>AC asked if Blue Badge concessionary travel and travel for cancer treatment data has been collected. SR explained that this data has not been collected yet. However, SR suggested that research will be conducted in relation to these topics.</p> <p>DB suggested sharing this research with disabled people due to the various challenges faced by them on a daily basis eg level boarding and disabled spaces availability. SR agreed that this would be very useful and will arrange to discuss this with DB.</p>	<p><b>MC</b></p> <p><b>SR/DB</b></p>
<b>5.</b>	<b>ACCESSIBLE TRAVEL FRAMEWORK DELIVERY PLAN</b>	
	KF provided a written update from Accessible Travel team. NB will circulate their slide to the Forum along with the full slide pack.	<b>NB</b>
<b>6.</b>	<b>BUS STRATEGY UPDATE</b>	
	<p>KF explained that the Case for Change has been completed and key themes have been identified. The key themes are:</p> <ul style="list-style-type: none"> <li>• Information and customer feedback</li> <li>• Good interchange and bus stops</li> <li>• Safety, security and inclusion</li> <li>• Customer charter for the region</li> </ul> <p>From these themes, a strategy is being developed. The next steps are stakeholder engagement which will be commencing in coming weeks. Thereafter, policy objectives will be developed and these will be taken to SEStran Partnership Board for approval. An update will be provided to this Forum at the next meeting.</p>	
<b>7.</b>	<b>TERMS OF REFERENCE</b>	
	<p>BB presented the slides. BB outlined the following:</p> <ul style="list-style-type: none"> <li>• Constitution and Context</li> <li>• Remit</li> <li>• Proposal</li> <li>• Draft Purpose</li> </ul> <p>BB proposed that a short-term working group be set up to discuss proposals within the next 2-3 weeks. BB asked if anyone who would like to be part of the group to email him – <a href="mailto:brian.butler@sestran.gov.uk">brian.butler@sestran.gov.uk</a></p> <p>DS agreed that this was a good proposal.</p>	<b>Forum Members</b>
<b>8.</b>	<b>DATE OF NEXT MEETING</b>	
	The date of the next meeting is <b>to be confirmed.</b>	

## Action Status Report

EQUALITIES & ACCESS TO HEALTHCARE FORUM

Meeting Date: 26 September 2024

Minute/Date	Agenda Item	Action	Person	Date Initiated	Due Date	Current Status	Date Completed
31/03/22	LOOKING AHEAD – EARLY ENGAGEMENT WITH NHS ON FUTURE PLANS AFFECTING TRANSPORT	Flag up that NHS Lothian need to link up with RTPs and members of this group regarding movement of services.	IS	31/03/22		Outstanding, Iain Sneddon did not attend on 12th October 2022. Iain Sneddon did not attend on 28th February 2023. Email sent Aug 23	
28/09/23	ACCESSIBLE TRAVEL FRAMEWORK ANNUAL DELIVERY PLAN	Steven Dora to link up Rhianne Forrest from Children's Health Scotland to discuss the Blue Badge.	SD	28/09/23		Steven Dora put his email in the chat facility of the forum.	
28/09/23	ACCESSIBLE TRAVEL FRAMEWORK ANNUAL DELIVERY PLAN	Steven Dora to look into the way that the Blue Badge is allocated.	SD	28/09/23			
28/09/23	THISTLE ASSISTANCE UPDATE	Keith Fiske to link up with Andrew McLellan from East Lothian Council regarding the VoyagaAR app.	KF & AMc	28/09/23		RM to speak to KF for update following EAH meeting on 29/2/24	
28/09/23	MOBILITY AND ACCESS COMMITTEE FOR SCOTLAND (MACS) TRANSPORT TO HEALTH AND SOCIAL CARE REPORT	Steven Dora agreed to invite Doreen Steele to the Accessible Travel Framework Steering Group, specifically for transport to health and social care issues.	SD	28/09/23			
29/2/24	TRAVEL TO HEALTHCARE	Mark Craske will forward presentation slides from an	MC/NB	29/2/24		Completed	

		Active Travel conference. Nikki Boath to circulate					
29/2/24	TRAVEL TO HEALTHCARE	Rachael Murphy will arrange a meeting with Rhianne Forrest.	RM	29/2/24		Completed	
29/2/24	TRAVEL TO HEALTHCARE	Rachael Murphy will send Mark Craske a copy of the Scottish Government Transport to Health Delivery Plan.	RM	29/2/24		Completed	
29/2/24	ACCESSIBLE TRAVEL FRAMEWORK DELIVERY PLAN	Jennifer Watson to send link for the DES Evaluation Report to Rachael Murphy to circulate.	JW & RM	29/2/24		NB to speak to RM to establish if this has been done.	Report circulated on 16/10/24
29/2/24	ACCESSIBLE TRAVEL FRAMEWORK DELIVERY PLAN	Cllr McMillan raised a concern about the Blue Badge application process. Cllr McMillan will forward his questions directly to Jennifer Watson.	Cllr McMillan	29/2/24		NB emailed JW to find out if Cllr McMillan has been in touch. Still awaiting reply from JW	
26/9/24	<b>RURAL ACCELERATOR PROJECT</b>	Tony McRae will provide Steven Revill & Iona Chandler with RVS contacts for Fife region.	Tony McRae	26/9/24			

26/9/24	<b>RURAL ACCELERATOR PROJECT</b>	MC will contact KH & BB to arrange a meeting to discuss an idea he has had in relation to Do Not Attend transport data.  MC will forward a paper to KF & BB to read	Mark Craske  Mark Craske	26/9/24  26/9/24			
26/9/24	<b>RURAL ACCELERATOR PROJECT</b>	DB suggested sharing this research with disabled people in relation to the various challenges faced by them on a daily basis eg level boarding and disabled spaces availability. SR agreed that this would be very useful and will arrange to discuss this with DB.	Douglas Bryce	26/9/24			
26/9/24	<b>ACCESSIBLE TRAVEL FRAMEWORK DELIVERY PLAN</b>	NB to circulate Accessible Travel Framework slide to Forum Members.	Nikki Boath	26/9/24			
26/9/24	<b>TERMS OF REFERENCE</b>	BB would like to create a short-term working group to revise Terms of Reference for this Forum. Forum members to contact Brian Butler – brian.butler@sestran.gov.uk	Forum Members	26/9/24			



**INTEGRATED MOBILITY FORUM**  
10:00AM THURSDAY 10<sup>TH</sup> OCTOBER 2024

**Present:**

Cllr Sally Pattle (Chair)(SP)	West Lothian Council
Cllr Russell Imrie (RI)	Midlothian Council
Cllr Colin Cassidy (CC)	Midlothian Council
Cllr Tom Conn (TC)	West Lothian Council
Cllr Jenny Linehan (JL)	Scottish Borders Council
Linda Bamford (LB)	NCM, SEStran
Doreen Steele (DS)	NCM, SEStran
Brian Butler (BB)	SEStran
Cheryl Fergie (CF)	SEStran
Sarah Junik (SJ)	SEStran
Rachael Murphy (RM)	SEStran
Sandra Lavergne (SL)	SEStran
Rebecca Smith (RS)	SEStran
George Hazel (GH)	George Hazel Consultancy
Ben Ritchie (BR)	Lothian Buses
Katharine Brough (KB)	Cycling Scotland
Keith Fiskien (KF)	SEStran
Michael Melton (MM)	SEStran
Aileen Webster (AW)	Forth Valley College
Ewan Doyle (ED)	Scottish Borders Council
Emma Crowther (EC)	Edinburgh University
Mark Speed (MS)	Tactran
Tony McRae (TMCr)	Fife Council
Jamie Robertson (JR)	City of Edinburgh Council
Chris Towers (CT)	Transpennine Express
Desmond Bradley (DB)	Scotrail
Grant Coltart (GC)	Dumfries and Galloway Council
Gareth Williams (GW)	Prosper
Ruth White (RW)	City of Edinburgh Council
Carlos Soto (CS)	Sustrans

**Apologies:**

Cllr Sanne Dijkstra-Downie	<b>City of Edinburgh Council</b>
Cllr Kayleigh O'Neill	<b>City of Edinburgh Council</b>
Bruce Kiloh	<b>SPT</b>
Jennifer Watson	<b>Transport Scotland</b>
Susan Keenlyside	<b>Fife Council</b>
George Lowder	<b>Transport for Edinburgh</b>
Sarah Elliott	<b>Stagecoach Buses</b>
David Kelly	<b>Community Transport Association</b>
Rebecca Taylor	<b>Scottish Government</b>

Ref.		Actions
1.	<b>Welcome and Introductions</b>	
	<p>Cllr Pattle welcomed everyone to the meeting and apologies were noted as above.</p> <p>David Kelly sent his apologies and requested Cllr Pattle to highlight the Community Transport Awareness Week running from 14th to the 18th of October. RM provided the link for this in the chat facility. <a href="https://ctauk.org/ctweek24">https://ctauk.org/ctweek24</a></p>	
2.	<b>Minutes of IMF – 25<sup>th</sup> April 2024 and matters arising</b>	
	<p><b><u>Matters arising from the last minutes:</u></b></p> <p>Cllr Imrie updated on the Edinburgh Bus Station. Discussions are ongoing with the bus station owners, the IMF members will be kept updated.</p> <p>AW confirmed that she has met with SP to discuss funding in Clackmannanshire.</p> <p>ED will pick up the action to share a template of the checklist used by Scottish Borders Council with KF.</p> <p>Access to healthcare will include community transport, the programme that we had laid out hasn't taken place in the form that we initially thought. RM is in talks with Public Health Scotland and NHS boards to establish relationships.</p> <p>The minutes were approved as a correct record.</p>	
3.	<b>People and Place – Delivery and Future Plans Update – Presentation by Rebecca Smith and Michael Melton</b>	
	<p>Rebecca Smith and Michael Melton updated the forum on delivery and plans of the People and Place Project. The updates covered the following:</p> <ul style="list-style-type: none"> <li>• Revenue and capital, programme delivery themes and events</li> <li>• Current projects – there are 100 around the region</li> <li>• Brompton Bike lockers at Queen Margaret University and Sheriffhall Park and Ride</li> <li>• Cabinet Secretary visit at Active Travel sites around Edinburgh</li> <li>• Local Authority Workshop received great feedback</li> </ul>	



	<ul style="list-style-type: none"> <li>• Developing a 5-year plan to further prioritise funding based on local and regional priorities with the aim to partially mitigate the impact of single year funding</li> <li>• Six intervention areas</li> <li>• Addition of sustainable transport for 25/26 – the budget is still to be confirmed for this</li> </ul> <p>SL placed the following link into the chat facility  <a href="https://usmart.io/org/sestran/">https://usmart.io/org/sestran/</a></p> <p>RS placed a news article link into the chat facility  <a href="https://www.midlothianview.com/news/foldaway-bikes-can-now-be-hired-for-5-at-sheriffhall-park-ride">https://www.midlothianview.com/news/foldaway-bikes-can-now-be-hired-for-5-at-sheriffhall-park-ride</a></p> <p>RS placed the Brompton Bike link into the chat facility  <a href="https://bromptonhire.com/">https://bromptonhire.com/</a> - Use the code <b>Sestrans2024</b> for your chance to get a three-day Brompton bike hire for free</p> <p>AW and GC requested to see the first draft of the 5-year strategy.</p> <p>LB noted that the £10m announced for active travel this week actually means that the £23m reduction announced a few weeks ago will now be a £13m reduction.</p> <p>SP suggested if people want to get involved in SEStran’s work to get in touch.</p>	<b>MM</b>
<b>4.</b>	<b>Regional Bus Strategy – Rachael Murphy &amp; Keith Fiskén</b>	
	<p>Rachael Murphy presented slides on the Regional Bus Strategy. This included work so far, the Case for Change and next steps. The Case for Change was signed off by SEStran board in June 2024 and will give clearer visions and objectives.</p> <p>RM highlighted the network is complicated and will look differently around the region. There is a mix of rural and urban and everybody should be served. The key to behaviour change is to make the bus network more attractive to everyone.</p> <p>The first draft of policies has been received from Systra and Stantec. SEStran will organise sessions with LAs and operators to consider these. Once this has happened, findings will be shared at forums etc.</p> <p>RM encouraged members to take part in a Regional Bus Strategy workshop, and to get in touch before the end of October. Her email address is <a href="mailto:rachael.murphy@sestran.gov.uk">rachael.murphy@sestran.gov.uk</a></p>	

	<p>RI noted the existing network must be corrected before it can be expanded. Congestion is a huge problem. RM agreed and would like to hear from operators and authorities to help with policies. The pause of the Bus Partnership Fund, which is designed to tackle problems like these, is frustrating but work is continuing in the background.</p> <p>TC highlighted problems with bus services in West Lothian. The public need to see sustainable and deliverable bus network and longer-term objectives need to be realistic.</p> <p>GH noted there is a lack of power and control. Discussions need to take place about governance. There is a need to look at appraisal methods as buses bring investment.</p> <p>BB pointed out that the Cab Sec has said buses are a priority and is trying to source additional funding but this may take time. Governance will be picked up in the Case for Change.</p>	
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5.	Rail	
	<p><b><u>City and Region Challenges and Opportunities – Presentation by Jamie Robertson, City of Edinburgh Council</u></b></p> <p>JR presented slides to the members on the future challenges and opportunities for transport in Edinburgh. The main opportunities are:</p> <ul style="list-style-type: none"> <li>• Powers/Policy</li> <li>• Heavy Rail</li> <li>• Regional Reform</li> <li>• Funding &amp; Levy's</li> <li>• Park &amp; Ride</li> <li>• Light Rail</li> <li>• Bus</li> </ul> <p>The following points were also covered:</p> <ul style="list-style-type: none"> <li>• Population is rising</li> <li>• Car traffic increasing</li> <li>• One of fastest growing regions in Europe</li> <li>• Bus priorities</li> <li>• Double Lothian bus fleet</li> <li>• Bus v Tram</li> <li>• Regional benefit of North South Tram plan from City Mobility Plan</li> <li>• Rail priorities, need for investment</li> <li>• The need for investment in infrastructure</li> </ul> <p>DB noted Scotrail have started a procurement service for new trains, are looking at electrification of services. Autumn and winter should see improvements to services.</p> <p>RI said transport is key, there needs to be integration of trams. Scottish government need to invest in more rolling stock.</p> <p>AW commented you've highlighted nicely how a person's travels often come down to cost. If there is integrated/subsidised ticketing this could alleviate some of this.</p> <p><b><u>Transpennine Express Update – Presentation by Chris Towers, Stakeholder &amp; Development Manager, TransPennine Express</u></b></p> <p>Chris Towers presented slides on the Hull Paragon Interchange, this is a transport interchange providing rail, bus</p>	

	<p>and coach services, its one of the largest transport hubs in the UK. The following points were covered:</p> <ul style="list-style-type: none"> <li>• Background</li> <li>• Central area with links to the ferry and Manchester Airport</li> <li>• Who customers are</li> <li>• Staff are there for safety, security, advice, support &amp; guidance</li> <li>• Safety hub</li> <li>• Impact and success of the hub</li> <li>• Modes include Walking and Wheeling, cycling, train, bus, taxi and private car</li> <li>• Entrance to the station is secure, bright with clear signage and space to circulate</li> <li>• A railway station is not just a hub to get from A-B, it's a place where transport is easy, joined up and simple, long or short distance</li> </ul> <p>CS was happy to see Active Travel considerations.</p> <p>LB commented it was good to see so much thought and planning behind the Safer Paragon Hub and station entrance design.</p> <p>CT encouraged members to put any questions they had into the chat facility of the meeting. He placed the following link to the virtual walkthrough of the station in the chat <a href="https://mystationview.com/">https://mystationview.com/</a></p>	
<b>6.</b>	<b>Terms of Reference – Update by Brian Butler</b>	
	<p>Brian Butler provided an update on the Integrated Mobility Forum's Terms of Reference. He ran through the purpose of the forum, the proposed next steps and asked if anyone had any interest in assisting with the update to get in touch.</p> <p>The aim is to present the revised Terms of Reference to the next meeting of the Integrated Mobility Forum for approval then to the following meeting of the Partnership Board for formal adoption.</p>	<b>BB</b>
<b>7.</b>	<b>AOCB</b>	
<b>8.</b>	<b>Next Meeting</b>	
a)	Topics/priorities for next meeting – There were no topics suggested.	
b)	Date of Next Meeting – TBC April 2025	



**Logistics & Freight Forum**  
**Thursday 21<sup>st</sup> November 2024, 2pm**  
**Microsoft Office Teams**

**In Attendance:**

Cllr Derek Glen (DG)	Fife Council
Cllr Ian Cameron (IC)	Fife Council
Cllr James Leslie	Fife Council
Cllr John McMillan	East Lothian Council
Cllr Tom Conn (TC)	West Lothian Council
Doreen Steel (DS)	NCM
Geoff Duke (GD)	NCM
Linda Bamford (LB)	NCM
Paul Garner (PG)	NCM
Simon Hindshaw (SH)	NCM
Keith Fiskien (KF)	SEStran
Nikki Boath (NB)	SEStran
Rachael Murphy (RM)	SEStran
Rebecca Smith (RS)	SEStran
Sarah Junik (SJ)	SEStran
Lukas Princ (LP)	HiTrans
Kevin Collins (KC)	Falkirk Council
David Prescott (DP)	Allan Rail
Akshay Puthiya-Kokillam (AKP)	Fife Council
Andrew Sim ((AS)	Fife Council
Matthew Roberts (MR)	Fife Council
Ewan Doyle (ED)	Scottish Borders Council
Jim May (JM)	Transport Scotland
Rose Tweedale (RT)	Transport Scotland
Nick Gallop	InterModality

**Apologies:**

Cllr Jenny Linehan	Scottish Borders Council
Jane Findlay	Fife Council
Mike Birch	NTBCC
Ian Budd	FOFNL
Geoff Lippitt	PD Ports

Ref.		Actions
1.	<b>Welcome and Introductions</b>	
	<p>KF welcomed members to the meeting and apologies were noted as above.</p> <p>KF highlighted that SEStran has appointed Cllr Sally Pattle as the new SEStran Chair as Cllr Davidson has stepped down.</p> <p>KF thanked Cllr Colin Davidson for chairing the Logistics &amp; Freight Forum and this was seconded by DP. KF explained that a new Chair for Logistics &amp; Freight Forum will be discussed at the next SEStran Partnership Board and the appointed Chair will be in place for the next Forum's meeting.</p>	
2.	<b>Minutes of last meeting</b>	
	<p><b>Matters arising from the last minutes:</b></p> <p><b>Space for Cargo Bike for last-mile logistics</b>  DP raised the point of removal of toilet facilities by local authorities. DP highlighted the importance of cargo bike riders having access to such facilities. KF said this will be noted and discussed with local authorities.</p> <p><b>UK Cargo Bike Summit Update</b>  No date for next Summit meeting has been confirmed. KF will check with Beth Harley-Jepson (SEStran) and will update at next Logistics &amp; Freight Forum meeting in 2025.</p> <p><b>Suggestions for topics at future meetings</b>  If any Forum members have suggestions for topics for discussion or would like to present a topic at future meetings, please contact Keith Fiskin – <a href="mailto:keith.fiskin@sestran.gov.uk">keith.fiskin@sestran.gov.uk</a></p> <p>The minutes were approved as a correct record.</p>	<p>KF</p> <p>KF</p> <p>Forum Members</p>
3.	<b>Regional Transport Strategy – Actions for Freight</b>	
	<p>RM provided a refresh of RTS freight policies, the challenges identified in the RTS and how this will shape SEStran's approach.</p> <p>RM provided an update on RTS Delivery Plan and highlighted this has been developed in collaboration with colleagues at City Region Deal.</p> <p>RM asked all Forum members to contact her with any specific ideas – <a href="mailto:Rachael.murphy@sestran.gov.uk">Rachael.murphy@sestran.gov.uk</a></p> <p>DP and Cllr Mcmillan would like to discuss Continental links.</p>	<p>DP/KF/RM</p>

<b>4.</b>	<b>Horizon Fusion Project</b>	
	<p>KF explained that SEStran, in partnership with European partners, submitted an EU (European Union) Horizon project proposal in September. The FUSION (Freight and Urban System Integration for Optimised Networks) project, if approved for funding, will focus on developing solutions and pilots to optimise urban transport networks through innovative synchro- and co-modality approaches, integrating complementary modes of transport to enhance efficiency and sustainability. Feedback is expected from the EU Commission in January 2025.</p> <p>NG happy to share outcomes of trial between Amazon and Great Western Railway in 2021 filling a coach with parcels from Swansea to Paddington on a 125mph Hitachi train.</p>	<b>NG/KF/RM</b>
<b>5.</b>	<b>Sustainable Aviation Technologies for Freight and Logistics</b>	
	<p>LP introduced his slides and provided some background to the pilot projects to aid aviation decarbonisation. LP provided information regarding the 2 types of drones in the study, their configurations and the type of freight these vehicles could carry.</p> <p>There was a discussion regarding the viability of an air route between Fife and Leith. LP explained the constraints and benefits.</p>	
<b>6.</b>	<b>Towards Zero Emissions - HGV</b>	
	<p>KF explained that Transport Scotland have published initial research on where en route charging and fuelling for zero emission HGVs will be needed: <b>Towards Zero Emission HGV Infrastructure in Scotland.</b></p> <p>KF will check if Heriot Watt are collecting data from traffic impact assessments. KF will follow up with AS.</p> <p>KF encouraged any interested fleets, local authorities or other interested organisations with relevant data to contact <a href="mailto:cls-info@hw.ac.uk">cls-info@hw.ac.uk</a> or <a href="mailto:karen.geekie@gov.scot">karen.geekie@gov.scot</a>.</p>	<b>KF</b>
<b>7.</b>	<b>Date of Next Meeting</b>	
	Date of Next Meeting – to be confirmed.	

## **People and Place Grant Awards**

### **1 INTRODUCTION**

- 1.1 The purpose of this paper is to report variations to the SEStran People and Place grant awards to the Board.

### **2 MAIN REPORT**

- 2.1 As per the Grant Standing Orders, several variations to the People and Place grant awards have been reviewed and approved by the Partnership Director since the previous Board meeting. All awards were under the delegation limit for approval by the Partnership Director.
- 2.2 Appendix 1 shows a list of grant award variations from those values reported to the Board at its last meeting. Also included is a short explanation of the reasons for each variation.

### **3 RECOMMENDATIONS**

- 3.1 The Partnership Board is asked to note the content of this report and the variations to the SEStran People and Place grant awards at Appendix 1.

Michael Melton  
**Programme Manager**  
6<sup>th</sup> December 2024

#### Appendix 1: SEStran People and Place Plan 2024/2025 – variations to grant awards

Policy Implications	The People and Place Plan aligns with the objectives of the RTS and therefore will help deliver on SEStran's policy objectives
Financial Implications	All costs are within the grant award from Transport Scotland, so there is no financial impact on the SEStran core budget. Funding agreements are in place for each grant to ensure funds are appropriately managed.
Equalities Implications	In supporting people to travel actively, the grants should have a positive impact on equalities. Specific elements of the grants have been designed to further support the accessibility of active travel, including a focus on the provision of adaptive bikes and a programme focused on physical barrier removal on pavements. An EqIA has been undertaken on the Plan and recommendations from this will be incorporated where possible.
Climate Change Implications	In promoting behaviour change from private cars to active travel, the grants will support the transition to net zero.



## SEStran People and Place Plan 2024/2025 – variations to grant awards

### Local Authorities grant award variations

<u>Local Authority</u>	<u>Previous Award</u>	<u>Current Award</u>	<u>Reason for change</u>
Scottish Borders Council	£433,800	£458,800	£25,000 of additional funding has been awarded from the regional active travel counter budget to allow purchase and installation of counters at several locations in the Borders.

### Third Party organisations grant award variations

<u>Organisation</u>	<u>Project</u>	<u>Previous Award</u>	<u>Current Award</u>	<u>Reason for change</u>
Greener Kirkcaldy	Community Active Travel Programme	£99,902	£109,902	£10,000 of additional grant has been awarded to allow the purchase of an electric van to operate as their mobile advice point instead of a diesel van or a trailer following an options and longer term sustainable appraisal

## PROJECTS AND STRATEGY PERFORMANCE REPORT

### 1 INTRODUCTION

- 1.1 This report and its appendices update the Board on the performance of the Partnership's strategy and project workstreams over the last quarter, following the update to be provided to the Performance and Audit Committee on 29<sup>th</sup> November
- 1.2 This project report sits alongside the new project lifecycle management process, that will link directly from the business plan to a project outline document, to a project initiation document and, once this has been approved, into this project progress report. This process will allow us to report to the Board and Performance and Audit Committee of progress against project objectives, with the aim of this commencing for all projects from the start of 25/26.

### 2 PROJECTS AND STRATEGY PROGRESS

- 2.1 Appendix 1 shows the current status of all project and strategy work that is currently being progressed. RAG ratings are provided to show finance and programme status, and summary counts of milestones progress, risk and issues are also shown.
- 2.2 Some key project and strategy work successes over the quarter have been:
  - The procurement process for GoSEStran and VoyagAR has been completed with a preferred supplier identified
  - Work completed on the initial phase of the EV delivery project to put in place common tender documents and agree a preferred route to market across all participating Local Authorities
  - The Regional Bus Strategy work has continued with the development of draft strategy policies and actions against a number of 'qualities' like service level are underway
  - Meetings have been held with each Local Authority as part of the RTS Delivery Plan to fully understand their transport dependencies to support work to prioritise projects
  - A successful event was held in Newburgh with representation from numerous stakeholder groups exploring the impact that a station could have on Newburgh and the surrounding area. The final addendum to the appraisal with notes from the meeting will be submitted to Transport Scotland in November for consideration
- 2.3 Three projects are currently showing as either having a current underspend or a risk of underspend:
  - The Strategic Regional Active Travel Network – progress has been delayed on this piece of work, and there is a risk that this may now run past the funding deadline of 31<sup>st</sup> March 2025, and therefore there may be an underspend. A meeting is currently being planned with Falkirk Council with the aim of unlocking several barriers and from that a realistic delivery programme will be put in place.

- Regional Bus Strategy – when allocating funding for 24/25, funding was given to this strategy to allow the completion of additional work packages. As work has progressed, it has become clear that this additional work cannot be fully completed in 24/25, and therefore it is anticipated that there will be an underspend of £50k and a request will be made to carry this budget over into 25/26 to allow this important work to continue.
- RTS Delivery Plan – the budget for this project has been set aside to support work funded either by the City Region Deal or Local Authorities to progress prioritisation of RTS aligned projects. There is a current risk that the £20k assigned to this work will not be spent in full in 24/25 depending on wider project progress, and so a request may be made to carry this funding into 25/26.

2.4 There are four projects that are currently showing as either having delays, or are at risk of delays, to their programmes

- VoyagAR and GoSEStran – the procurement process for both of these pieces of work has been conducted jointly, and a preferred supplier identified. However, progress in appointing this supplier has been slower than expected, and there is now a risk that they will not be in place by 31<sup>st</sup> December 2024. The principal issues for this are a lack of capacity at Tactran to progress the appointment and the associated legal and contractual documentation that is required. Discussions are ongoing with Tactran to resolve this and return this project to its programme.
- Strategic Network – as noted at 2.3
- EV Delivery – The target date for completion of a regional procurement exercise is 31<sup>st</sup> December 2025, however in order to meet this date approvals need to be in place from all Local Authorities to allow the process to begin in February 2025. At present, it is unlikely that this date can be met, albeit work on clarifying budget and governance is being expedited where possible to try and retain this start date. Mitigations are currently being explored, including writing to Transport Scotland to seek clarity on the 31<sup>st</sup> December deadline.

2.5 There are 20 risks on the risk register, 4 of which has been added this quarter, and an additional 4 risks have been closed this quarter. Of these risks, 18 are classed as medium, all of which have mitigation plans in place. There is 1 risk that is classed as high which is around timeline for the EV delivery project – explanation and mitigations are as described at 2.4 above.

2.6 One issue has emerged over the quarter:

- GoSEStran – Tactran have had issues with capacity over the quarter, which has caused delays to the project and procurement process, and limited development or marketing work undertaken over this period. A brief for consultancy support is being developed to provide interim support to minimise any further project delays.

The three issues that had previously been reported are now all resolved and closed.

### **3 PEOPLE AND PLACE**

- 3.1 The People and Place (P&P) plan has been integrated into appendix 1 but, given its scale, it is presented with its own risk register and budget. For reporting purposes, P&P has been broken down into three areas according to who will be spending the funding – Local Authorities, third parties, and SEStran.
- 3.2 People and Place is currently running to programme and budget. There are no high risks on People and Place. There are however 9 medium risks that are being actively managed with the mitigations noted. This is up from 5 medium risks reported in Q2, the increase being driven mainly by new risks being identified around uncertainty on timelines and level of funding for 25/26. 3 medium issues are currently being managed, of which 1 is new within this quarter around payment timescales to funded organisations.
- 3.3 Progress on the People and Place Plan (PPP) has gone well over the quarter. At the start of the quarter, project update reports were received from most partners, and these were compiled and sent to Transport Scotland (TS) as one regional report. Feedback from TS on this report and SEStran's progress to date was positive. This report has been included for Members reference at Appendix 2.
- 3.4 Whilst overall the full grant is still predicted to be spent in full, there was a drop seen in grant claims received for Q2 compared to the predicated value by around £230,000. The principal reasons for this are:
- £25,000 of SEStran project management costs going unspent as noted at 3.5
  - £140,000 of claims across 2 local authorities that were not submitted as expected. Discussions are ongoing and both are expected to catch up on this spend over Q3 and Q4
  - £65,000 of underspend in other claims, and as above it is expected that this amount will be made up in Q3 and Q4.
- 3.5 During the quarter, SEStran's project management costs were reviewed and found to have been budgeted too high when considering existing staffing allocations within the core budget. As such, this budget has been reduced from £100,000 to £25,000. The budget freed up will be used for some additional work to prepare for 25/26 delivery, additional programme evaluation costs to ensure this is as robust as possible, and the remainder used for project delivery (with priority given to extending schools projects to run until the end of the summer term).
- 3.6 One of the main items of work over the quarter has been the development of the 25/26 onwards P&P Delivery Plan. Following early discussions at our Local Authority workshop in August, the first draft plan was circulated to stakeholders in October, with feedback being generally positive. Work is currently ongoing to adapt the Delivery Plan in line with this feedback where appropriate, and it remains on track to be presented to the December Board Meeting where a fuller update will be given.

3.7 To ensure transparency over projects being funded and to share details of this amongst all partners and stakeholders to help facilitate collaboration, an online dashboard has been created with the support of Urban Tide. Whilst still awaiting some final updates before being widely shared, Members are welcome to view the map here: <https://usmart.io/org/sestran/>

#### 4 COMMUNICATIONS AND MARKETING UPDATE

4.1 Sarah Junik, SEStran’s new Communications and Marketing Officer, started during the quarter. A fuller update on communications and marketing will be provided in future quarters as work progresses, and at the December meeting of the Partnership Board, but some key initial successes have been:

- A press release on Cllr Pattle taking up the role as Partnership Board Chair received coverage in several local newspapers.
- There was coverage in several local newspapers about the Brompton bike locker in Musselburgh as part of the Go E-bike project.
- Monthly social media reporting has been setup, and this has shown that, through regular posting on LinkedIn, we’ve increased the number of impressions from September to October by over 200%, and grown the number of monthly new followers by over 400%
- A tender brief has been written to procure a film company to make three People and Place case study videos, which are due to be complete in quarter 4
- Organised amendments and reprint of the Thistle Assistance cards and leaflet
- Plans have been made for SEStran’s communications priorities for October through to March 2025 and actions are now being delivered associated with this.

#### 5 RECOMMENDATIONS

5.1 The Board is asked to note progress recorded by project in the past quarter, as previously noted by the Performance and Audit Committee

Michael Melton  
**Programme Manager**  
 6<sup>th</sup> December 2024

**Appendix 1:** SEStran Projects & Strategy Tracker – November 2024

**Appendix 2:** SEStran People and Place Q2 report

Policy Implications	Outlined project work contributes to the objectives identified within the SEStran Regional Transport Strategy.
Financial Implications	All project work is delivered within confirmed budgets.
Equalities Implications	There are no adverse equalities implications arising from SEStran projects. Several projects actively work to reduce inequalities.
Climate Change Implications	There are no negative climate change implications arising from SEStran projects. Several projects actively work to tackle climate change through the creation of, or support for more sustainable transport options.

Project	Finance Status		Programme Status		Milestones					Risks		Issues			Last Updated
	Finance Status	Change since Q2	Programme Status	Change since Q2	No on track	No completed	No late completed	No delayed	No late	No Medium	No High	No Medium	No High	No Critical	
<u>Thistle Assistance</u>	On Budget	↔	On Target	↔	0	0	0	0	0	0	0	0	0	0	11/6/2024
<u>VoyagAR</u>	On Budget	↔	Minor Delay	↓	0	0	0	2	0	1	0	0	0	0	11/1/2024
<u>Real Time Passenger Information</u>	On Budget	↔	On Target	↔	1	1	1	0	0	2	0	1	0	0	11/1/2024
<u>GoSEStran</u>	On Budget	↔	Minor Delay	↓	0	1	1	3	0	3	1	2	0	0	11/1/2024
<u>Go Ebike</u>	On Budget	↔	On Target	↔	2	1	0	0	1	0	0	0	0	0	11/11/2024
<u>Strategic Network</u>	Risk of Underspend	↓	Minor Delay	↔	0	0	1	2	0	1	0	0	0	0	11/11/2024
<u>EV Delivery</u>	On Budget	↔	Major Delay	↓	0	1	2	2	0	1	1	0	0	0	11/8/2024
<u>Regional Bus Strategy</u>	Underspend	↓	On Target	↔	0	0	1	0	0	3	0	0	0	0	11/11/2024
<u>Transport to Healthcare</u>	On Budget	↔	On Target	↔	0	1	0	1	0	2	0	1	0	0	11/4/2024
<u>Regional Freight Strategy</u>	On Budget	↔	On Target	↔	0	2	1	0	0	2	0	0	0	0	11/11/2024
<u>RTS Delivery Plan</u>	Risk of Underspend	↓	On Target	↔	5	1	0	1	0	2	0	0	0	0	11/11/2024
<u>Rail Strategy</u>	On Budget	↔	On Target	↔	0	0	0	0	0	1	0	0	0	0	11/11/2024
<b>Total</b>					<b>8</b>	<b>8</b>	<b>7</b>	<b>11</b>	<b>1</b>	<b>18</b>	<b>2</b>	<b>4</b>	<b>0</b>	<b>0</b>	
<b>People and Place Plan:</b>										9	0	0	0	0	
<u>Local Authority Projects</u>	On Budget	↔	On Target	↔	2	3	1	0	0						11/11/2024
<u>Non-Local Authority Projects</u>	On Budget	↔	On Target	↔	2	3	0	0	0						11/11/2024
<u>SEStran Projects</u>	On Budget	↔	On Target	↔	4	4	0	0	0						11/11/2024
<b>Total</b>					<b>8</b>	<b>10</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>9</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	

**Project Risk Register**

Risk Number	Project	Order	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due)	Completed Actions	Status	Date Raised	Last Updated	Owner
PR001	Thistle Assistance	1	Use of the app leads to an accident due to lack of training or awareness from transport operators	Unlikely	Major	Medium Risk	Good communication material made available and training provided for operators	Remote	Moderate	Low Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF
PR002	Thistle Assistance	1	Issue with app software prevents users from accessing the app	Unlikely	Moderate	Low Risk	Working closely with the software developers to ensure that the app is up to date and in compliance with apple store / Google requirements	Remote	Moderate	Low Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF
PR003	Thistle Assistance	1	Data breach for personal data collected as part of card process	Unlikely	Major	Medium Risk	SEStran GDPR policy to be followed at all times and data deleted at regular intervals in line with this, with no personal data retained	Remote	Major	Low Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF
PR004	VoyagAR	2	Supplier cannot be found to take over development and launch the app	Possible	Major	Medium Risk	Procurement combined with GoSEStran to increase attractiveness, discussions held with potential suppliers to gauge interest	Unlikely	Major	Medium Risk	Procurement of GoSEStran complete, but future role of VoyagAR not fully clear at this time, so risk remains	Met with Tactran 05/24 to agree procurement approach	In Progress	4/1/2024	11/11/2024	KF
PR005	Real Time Passenger Information	3	Operator data is inaccurate or drops out, resulting in poor user impression/loss of faith in data accuracy/damage to SEStran reputation	Probable	Major	High Risk	Regular meetings with transport operators to ensure data accuracy	Possible	Major	Medium Risk	As per planned response/mitigations 211/11		In Progress	4/1/2024	11/11/2024	KF
PR006	Real Time Passenger Information	3	System failure and/or data feed disruption resulting in system becoming unavailable	Possible	Major	Medium Risk	Regular meetings with tech supplier to ensure updates are being made and contingency plans are in place	Possible	Major	Medium Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF
PR007	Real Time Passenger Information	3	At contract end, framework contract negotiation fails and/or results in increase in costs impacting ability to delivery additional screens	Possible	Moderate	Medium Risk	Seek negotiation of contract when required working with RTP partners and suppliers to come to agreement	Unlikely	Minor	Low Risk	As per planned response/mitigations 11/11	Initial meeting held between RTPs to agree exploration of joint approach to procurement.	In Progress	4/1/2024	11/11/2024	KF
PR008	GoSEStran	4	Lack of funding to continue with the app to improve the app and continue current offering for 3 years	Probable	Major	High Risk	Ongoing dialogue with TS around future plans for MaaS and outcome of pilot evaluation. Tactran delivering programme and look for funding opportunities. Tactran developing funding plan	Possible	Major	Medium Risk	Continue to check in with Tactran and create action tracker to understand progress	Some additional funding secured from TS and SCSP fund - 01/04 Comms prepared for app 01/07	In Progress	4/1/2024	11/11/2024	RS
PR026	GoSEStran	4	Ad hoc nature of support service through customer service desk could mean responses to customers are delayed resulting in poor customer experience	Possible	Minor	Low Risk	Schedule checks with Tactran to ensure responses are sent within a timely manner	Unlikely	Minor	Low Risk	As per planned response/mitigations 20/06  Request additional support is integrated into new contract with supplier by 11/12		In Progress	6/20/2024	11/11/2024	RS

**Project Risk Register**

Risk Number	Project	Order	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due)	Completed Actions	Status	Date Raised	Last Updated	Owner
PR029	GoSEStran	4	Staff capacity to deliver project is limited and could be significantly impacted by unforeseen absence, leading to project delays	Probable	Major	High Risk	See issue PI005	Probable	Major	High Risk	See issue PI005		New	10/7/2024	11/11/2024	RS
PR028	GoSEStran	4	Contract not in place for chosen supplier by December leads to app being withdrawn for a period and consequent loss of users	Probable	Major	High Risk	Ongoing discussions with Tactran on legal support Agreement reached for Anderson Strathern to draft contract.	Possible	Major	Medium Risk	Meeting supplier 21/11 to discuss options		New	11/11/2024	11/11/2024	RS
PR030	GoSEStran	4	Lack of sufficient user research on current app means that future improvements either are not made or do not respond to user needs	Probable	Moderate	Medium Risk	Discuss at inception meeting with supplier Look at starting user research under current contract prior to end of 2024	Possible	Moderate	Medium Risk	Meeting supplier 21/11 to discuss		New	11/11/2024	11/11/2024	RS
PR013	Strategic Network	5	Lack of data availability makes mapping element longer than expected and/or incomplete	Probable	Moderate	Medium Risk	Ensure early engagement with each LA to access any available mapping data. Seek other partners who may have relevant data	Possible	Minor	Low Risk	Follow up with two outstanding LAs to identify final gaps in mapping data. 18/11		In Progress	4/1/2024	11/11/2024	BHJ
PR027	Strategic Network	5	Delays to design feedback leads to significant delays which mean project cannot be completed by end of financial year when current funding expires	Probable	Major	High Risk	Consultant to lead ongoing dialogue with Falkirk Council including arranging workshops as needed with all relevant parties	Possible	Major	Medium Risk	Meet with Falkirk Council to discuss next steps 21/11		New	11/11/2024	11/11/2024	MM
PR014	EV Delivery	6	Failure to secure funding commitments from local authorities to fund a collaborative exercise	Probable	Major	High Risk	Gain understanding of approval processes required by each LA and support getting delegated approval in place as required. Develop clear and costed project scope to support funding decisions	Possible	Major	Medium Risk	Risk updated to cover requirement for £330k to fund full procurement exercise Develop detailed budget proposal to be developed by 04/12 MOU to be developed by 04/12 Agree funding pot and appointment of consultant 04/12	Initial £15k contribution per LA secured and spent	In Progress	4/1/2024	11/11/2024	MM



**Project Risk Register**

Risk Number	Project	Order	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due)	Completed Actions	Status	Date Raised	Last Updated	Owner
PR015	EV Delivery	6	Compressed timescale required to reach contract start date is very tight, and leads to low quality of work and/or missed deadlines and/or failure to meet CPS switch off date	Probable	Major	High Risk	Seek ongoing consultant support for project management	Probable	Major	High Risk	Work to timetable as per risk PR014 to ensure project progress Write to TS to seek clarity on CPD switch off date Investigate additional mitigations dependant on outcome of the above		In Progress	4/1/2024	11/11/2024	MM
PR016	Regional Bus Strategy	7	Work produced by the consultant is of low quality and/or delivered behind programme	Possible	Major	Medium Risk	Weekly meetings with consultants to check on progress and work produced to date, staggered payment schedule for invoicing	Unlikely	Major	Medium Risk	As per planned response/mitigations 04/11		In Progress	4/1/2024	11/4/2024	RM
PR017	Regional Bus Strategy	7	Lack of buy in from stakeholders	Possible	Major	Medium Risk	Regular updates to SEStran Board, website page on bus strategy updated regularly	Unlikely	Major	Medium Risk	As per planned response/mitigations 04/11	Website page created: <a href="https://sestran.gov.uk/projects/regional-bus-strategy/">https://sestran.gov.uk/projects/regional-bus-strategy/</a>	In Progress	4/1/2024	11/4/2024	RM
PR018	Regional Bus Strategy	7	Lack of investment at a national level for delivery of outputs of strategy	Probable	Major	High Risk	Continue to support the case for bus investment at relevant meetings with TS	Possible	Major	Medium Risk	As per planned response/mitigations 03/09		In Progress	4/1/2024	9/3/2024	RM
PR019	Transport to Healthcare	8	Lack of buy in from stakeholders	Possible	Major	Medium Risk	Regular meetings and ongoing opportunities to collaborate	Unlikely	Major	Medium Risk	As per planned response/mitigations 03/09		In Progress	4/1/2024	9/3/2024	RM
PR020	Transport to Healthcare	8	Lack of strategic direction from Scottish Government	Possible	Major	Medium Risk	Active engagement with policy leads at Scot Gov	Unlikely	Major	Medium Risk	As per planned response/mitigations 03/09		In Progress	4/1/2024	9/3/2024	RM
PR021	Regional Freight Strategy	9	Lack of buy in from stakeholders	Possible	Major	Medium Risk	Run quarterly Regional Freight & Logistics forum meetings	Unlikely	Major	Medium Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF
PR022	Regional Freight Strategy	9	Lack of capacity in the public sector to further develop and deliver on freight strategy	Possible	Major	Medium Risk	Look to provide training and support as needed	Unlikely	Major	Medium Risk	As per planned 11/11		In Progress	4/1/2024	11/11/2024	KF

**Project Risk Register**

Risk Number	Project	Order	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due)	Completed Actions	Status	Date Raised	Last Updated	Owner
PR023	RTS Delivery Plan	10	Lack of engagement from stakeholders	Possible	Major	Medium Risk	Regular meetings and opportunities to collaborate	Unlikely	Major	Medium Risk	As per planned response/mitigations 203/09		In Progress	4/1/2024	9/3/2024	RM
PR024	RTS Delivery Plan	10	Low data input from partners	Possible	Major	Medium Risk	Seek to minimise requests as much as possible, when making requests give long lead in times	Unlikely	Major	Medium Risk	As per planned response/mitigations 03/09		In Progress	4/1/2024	9/3/2024	RM
PR025	Rail Strategy	11	Lack of investment at a national level for delivery of outputs of strategy	Probable	Major	High Risk	Continue to support the case for rail investment at relevant meetings with TS	Possible	Major	Medium Risk	As per planned response/mitigations 11/11		In Progress	4/1/2024	11/11/2024	KF

### Project Issue Log

Issue Ref	Project	Description	Severity	Next Steps (date and who)	Lessons Learnt	Status	Date Raised	Last Updated	Owner
PI001	Real Time Passenger Information	Lothian Buses data integration has been problematic as there is a separate stream of work being undertaken by LB to update their internal systems. The data feed is currently incompatible with the regional system.	Medium	A solution is in place and the target is for real time data will roll out from their fleet from end June 2024. For the regional screen network only, scheduled data will be displayed. The screens will be updated with a message to this effect. KF having regular meetings to discuss and update.	tbc	Closed	12/11/2023	11/11/2024	KF
PI002	Transport to Healthcare	Outcome of UK Government funding bid will be delayed until after the election due to the purdah period	Medium	RM working with partners to understand impact of any delays on potential programmes. As this become known further updates will be made to this issue.	When a minor partner but nonetheless with an active role in delivery, confirm with funder and lead partner that all comms will be shared.	Closed	5/22/2024	5/29/2024	RM
PI003	GoSEStran	Appointment of tech supplier/ new contract/ legal support will be delayed due to timescales for procurement. This is expected to result in the Ember contract being extended to Dec to ensure app is continuously live between suppliers.	Medium	Ember contract drafted to allow for 3 month extension till Dec 2024.	Develop clearer timescales when preparing for procuring and ensure additional time is given in the transitional period from one supplier to another.	Closed	6/20/2024	11/11/2024	RS
PI004	GoSEStran	Unexpected staff absence has caused delays in project delivery. Procurement is yet to be concluded with contract preparation to be delivered. There has been limited development work or marketing planned during this time.	Medium	Consultant brief to be drafted by SEStran to secure interim resource to limit and further delivery delays - by 29/11 Budget to be reworked to incorporate consultant support as above - by 06/12	tbc	In Progress	11/11/2024	11/21/2024	RS

## Thistle Assistance

Budget Code: 92077  
 Responsible Officer: Sandra Lavergne  
 Manager: Keith Fiskin  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/6/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network</li> </ul>
Project Summary
The Thistle Assistance Programme provides helps to those that have difficulty in using and accessing public transport. SEStran aim to provide a national approach. The programme increases awareness of challenges faced by vulnerable transport users and reduces the cost for transport operators.
Q1 Progress
Research brief has been drafted and will be reviewed by KF. Understanding of next steps and how the research will inform the development of the Thistle Assistance Comms Plan.
Q2 Progress
Updates made to existing App - security and useability enhancements
Q3 Progress
New Project Officer and Marketing officer in place working on the project New existing stock of leaflets and cards depleted, new order to be placed for resupply Publication of updated Accessible Travel delivery plan by TS (Oct 2024) with ambition to promote Thistle Assistance Continuity to promote Thistle Assistance on social media
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
n/a					

Budget		
	Income	Expenditure
<b>Original Budget</b>	£15,996	£42,000
<b>Current Budget</b>	£15,996	£42,000
<b>Spend to Date</b>	£0	£1,097
<b>Remaining</b>	£15,996	£40,903
<b>Predicted future spend</b>	£15,996	£40,903
<b>Predicted total spend</b>	£15,996	£42,000
<b>Predicted Variance</b>	£0	£0

# VoyagAR

Budget Code: 92089  
 Responsible Officer: Rebecca Smith  
 Manager: Keith Fisker  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/1/2024

**Programme Status:** Minor Delay

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network</li> </ul>
Project Summary
<p>The VoyagAR system provides users with an accessible option within the public transportation ecosystem. Aimed at the traveller within this scenario, who is likely to be a vulnerable individual, the mobile application allows its user to navigate along a pre-defined journey (defined by their carer(s) using the carer app via the web) or create their journey from starting point to an end destination using in-app navigation prompts which update in real-time based upon the users' location and device GPS data.</p>
Q1 Progress
<p>SEStran has received all of the core coding from the outgoing developer Sentireal                      To secure a new partner to manage further development the VoyagAR procurement will be included in the wider MaaS procurement programme.                      The procurement is being run in partnership with Tactran, with the work underway</p>
Q2 Progress
<p>SLA for IMPs partnership signed and includes exploring VoyagAR and its future development.                      Procurement for tech supplier live 10/07/2024 through Innovate UK - open till 05/08/2024. Focus is MaaS apps but VoyagAR and accessibility development forms part of the bid.                      Innovate UK pitch days set up for Sept. 2024 which will determine how suppliers see the app being integrated.</p>
Q3 Progress
<p>The procurement pitches had mixed abilities to integrate VoyagAR into GOSEStran. Accessibility integrations are being added into the contract being prepared to finalise the report. The procurement process, and appointing a supplier, has been delayed due to staff absense and is expected to be complete by December 2024.</p>
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Procurement of supplier complete	9/30/2024	12/2/2024		Delayed	11/1/2024
Go live date for app	1/31/2025	3/31/2025		Delayed	11/1/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£0
<b>Current Budget</b>	£0	£0
<b>Spend to Date</b>	£0	£0
<b>Remaining</b>	£0	£0
<b>Predicted future spend</b>	£0	£0
<b>Predicted total spend</b>	£0	£0
<b>Predicted Variance</b>	£0	£0

## Real Time Passenger Information

Budget Code: 92019  
 Responsible Officer: Rebecca Smith  
 Manager: Keith Fisken  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/1/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>•Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network</li> <li>•Introduce Real Time Passenger Information for public transport services through mobile applications, stations and stops and across all parts of the region</li> </ul>
Project Summary
The provision of real-time information contributes to tackling declining bus patronage in the SEStran region, helps makes public transport more accessible and reliable and increases confidence in public transport.
Q1 Progress
LA project group continues to meet weekly Lothian bus feed solution has been developed by the Lothian bus team and is being tested for integration into the SEStran system. End of June 2024 is proposed 'go live' date
Q2 Progress
Lothian bus feed solution is now expected to go live at end of September with full 'disruption' data being available end of September. Testing successful as of 03/09/2024. Speaking with several organisations with offline screens to determine how to progress. Midlothian screen replcement largely complete, West Lothian will comence in September.
Q3 Progress
RTPI screens now show live Lothian feed as of 9th September 2024. Journeo EPI training completed October 2024, including local authority officers, which will allow new staff members to report faults with screens, track the status of screens, add imagery and advertisement to screens, and track performance. SEStran PCs are being monitored and project team are contacting organisation's to resolve any faults or issues.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Complete review of screen network	9/30/2024		9/30/2024	Complete	11/1/2024
Lothian tracker going live on RTPI screens	7/31/2024	31/09/2024	9/9/2024	Complete - Late	11/1/2024
Review reporting template for PCs	31/11/2024			On Track	11/1/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£15,000	£15,000
<b>Current Budget</b>	£15,000	£15,000
<b>Spend to Date</b>	£5,000	£0
<b>Remaining</b>	£10,000	£15,000
<b>Predicted future spend</b>	£10,000	£15,000
<b>Predicted total spend</b>	£15,000	£15,000
<b>Predicted Variance</b>	£0	£0

## Go SEStran

Budget Code: 92086  
 Responsible Officer: Rebecca Smith  
 Manager: Michael Melton  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/1/2024

Programme Status:

Minor Delay

Finance Status:

On Budget

RTS Actions
<ul style="list-style-type: none"> <li>Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network</li> <li>Deliver a regional MaaS pilot scheme to establish the long-term viability of MaaS in the region</li> </ul>
Project Summary
The GoSEStran MaaS app is a digital tool which promotes and enables sustainable travel as well as helping improve the viability of shared multi-modal transport opportunities. This project will support the continued running of the app under its current contract until September. Any continuation of this project post September is subject to Board approval, and in turn completing procurement exercise and securing funding for the continuation.
Q1 Progress
The current contract has been extended by 6 months as per the board decision. Discussions have been ongoing with Tactran to agree future roles, and Tactran have taken a lead on procurement. Discussions have been held with Perth and Kinross Council and Innovate UK to identify the best procurement route.
Q2 Progress
SLA for IMPs partnership signed and inception meeting set up for August. PID and Contract Strategy signed off by Tactran and SEStran directors. Procurement for tech supplier live 10/07/2024 through Innovate UK - open till 05/08/2024. Innovate UK pitch days set up for Sept. 2024. 14 suppliers applied with 7 taken forward for pitch days. Ember contract extension confirmed through change control notice to ensure app continues running Sept-Dec 2024 whilst procured supplier onboards.
Q3 Progress
The procurement process, and appointing a supplier, has been delayed due to staff absence and is expected to be complete by December 2024. Meetings with stakeholders have been set up to investigate opportunities for the GoSEStran platform to offer more to users. This includes signposting to more payment methods, integrating more features, and targeting specific users groups. The remaining Transport Scotland MIF grant funding was finalised and reporting on the 6 month extension has been submitted.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Report to Board on next steps	9/27/2024		9/27/2024	Complete	11/1/2024
New supplier in place	9/30/2024	12/31/2024		Delayed	11/1/2024
Ember contract extension awarded	7/31/2024	20/08/2024	13/08/2024	Complete - Late	8/26/2024
Funding secured for 2025-27	9/27/2024	12/31/2024		Delayed	8/26/2024
App development plan for GoSEStran	12/20/2024	1/31/2025		Delayed	11/1/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£174,750	£174,750
<b>Current Budget</b>	£174,750	£174,750
<b>Spend to Date</b>	£56,000	£22,838
<b>Remaining</b>	£118,750	£151,912
<b>Predicted future spend</b>	£118,750	£151,912
<b>Predicted total spend</b>	£174,750	£174,750
<b>Predicted Variance</b>	£0	£0

## Go Ebike

Budget Code: 92076  
 Responsible Officer: Beth Harley-Jepson  
 Manager: Michael Melton  
 RTS Objectives: 1, 2, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
7.0 Delivering Safe Active Travel • Expand the provision of bike-sharing initiatives across the region 8.0 Enhancing Access to and Accessibility of Public Transport • Identify locations where implementation of shared mobility solutions could be beneficial and reduce the level of ‘forced’ car ownership
Project Summary
The Go e-bike project involves supporting access to e-bikes and bike share through a variety of routes. Employer e-bike trials are supported in partnership with West Lothian Bike Library. This allows employers to trial a fleet of e-bikes for 4 weeks to give employers and employees to understand the benefits of e-bikes. Community groups across the region have been provided with fleets of e-bikes. This supports access to e-bikes at a local level. Public access bike share is supported through a trial of Brompton (folding bikes) lockers. These are operating in Midlothian and East Lothian. We are in discussion with Scotrail to add a further locker (owned by Sustrans) at Haymarket.
Q1 Progress
Employer trial was held at St Johns Hospital and Persimmon Homes in West Lothian. Survey data was collated from 23/24 employer trials. Brompton hire lockers were vinyl wrapped ahead of going live.
Q2 Progress
Four e-bikes were relocated from the Scottish Borders due to insufficient use. These were moved to City of Edinburgh Council for a longer term employer trial (April 2025) and to West Lothian Bike Library to supplement their public hire fleet. Discussions ongoing to identify additional employers to take part in further employer trials, staff survey taking place at Western General hospital to identify if there is demand. Skills Development Scotland have started a small scale trial with staff in Edinburgh. Brompton hire lockers went live at Musselburgh QMU and at Sheriffhall Park and Ride. A meeting was held with Scotrail at Haymarket Station to determine a potential location for the Sustrans locker.
Q3 Progress
Go e-bike employer trial taking place with staff from Skills Development Scotland over September and October. Cycle Ride Leader training course provided to Social Bite Village to support the use of the e-bike fleet with staff and residents. Bike maintenance and cargo bike training provided to Porty Community Energy to support volunteers with the e-bikes available to loan. We are awaiting a response from Scotrail on the site risk assessment outcome this is due to be reviewed on the 18th November. Press release issued about the Musselburgh Brompton bike locker, with coverage in several local newspapers.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Brompton Haymarket locker gets go -ahead from Scotrail	9/30/2024	11/18/2024		Late	11/11/2024
Brompton Haymarket locker installed on site	3/31/2025			On Track	9/2/2024
Two employer trials delivered in partnership with TKH	3/30/2025			On Track	9/2/2024
Existing Brompton lockers small launch event and promotion campaign.	10/28/2024		10/14/2024	Complete	10/31/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	-£2,638	£27,362
<b>Current Budget</b>	-£2,638	£27,362
<b>Spend to Date</b>	-£2,638	£1,223
<b>Remaining</b>	£0	£26,139
<b>Predicted future spend</b>	£0	£26,139
<b>Predicted total spend</b>	-£2,638	£27,362
<b>Predicted Variance</b>	£0	£0

Budget Notes
Income is negative due to an overpayment on a grant claim from 23/24 that has been repaid in 24/25. No income beyond this correction is budgeted for this project



# Strategic Network

Budget Code: 92082  
 Responsible Officer: Beth Harley-Jepson  
 Manager: Michael Melton  
 RTS Objectives: 1, 2, 4  
 Last Updated: 11/11/2024

**Programme Status:** Minor Delay

**Finance Status:** Risk of Underspend

RTS Actions
<ul style="list-style-type: none"> <li>• Progress the delivery of the SEStran Strategic Network and broader cross boundary networks with partners. Develop further phases of this network to ensure a long-term pipeline of investment</li> <li>• Deliver road safety measures that enable people to safely use active travel within the region</li> </ul>
Project Summary
<p>This project is in 2 parts:</p> <ol style="list-style-type: none"> <li>1. Complete the design of the Falkirk to Polmont and Falkirk to Larbert to the point of being 'construction ready'. This 6 month piece of work will conclude the design work begun in previous years on behalf of Falkirk council for 2 routes that form elements of the SEStran Strategic Network.</li> <li>2. Carry out a review of the current network and its fit with changing local authority plans, with the aim of a robust regional document that support local authorities in securing funding for elements of the network that align with their priorities.</li> </ol>
Q1 Progress
<p><u>Falkirk routes:</u> Funding bid to Sustrans was placed on hold due to lack of funding, alternate funding offered by Falkirk Council via their TS grant, consultant brief completed and quote received, project to start early June (approx. 4 week delay).  <u>Network review:</u> Baseline mapping work included in tender for PPP development support, to begin in early June on schedule</p>
Q2 Progress
<p><u>Falkirk Routes:</u> Procurement complete, but work start is further delayed due to resource constraints at Falkirk Council - kick off meeting expected early September, so delay is now up from 1 month in Q1 to 4 months at present. Still anticipate completion by end 24/25.  <u>Network review:</u> work continues to gather data, remains on schedule at this time</p>
Q3 Progress
<p><u>Falkirk Routes:</u> Workshop held with Falkirk Council end September to discuss design refinements needed. Still several outstanding issues that require addressed before work can commence to complete design. Further meeting currently being sought to resolve. Risk of delay and/or underspend remains and cannot be further clarified until after this meeting.  <u>Network review:</u> work continues to gather data, with the majority now received but some remains outstanding - completion date delayed by around 2 months</p>
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Feedback on current design complete	6/30/2024	8/31/2024	9/27/2024	Complete - Late	11/11/2024
Completion of design work	9/30/2024	3/31/2025		Delayed	11/11/2024
Completion of baseline map (via PPP)	11/30/2024	1/31/2025		Delayed	11/11/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£42,399	£45,450
<b>Current Budget</b>	£42,399	£45,450
<b>Spend to Date</b>	-£3,051	£0
<b>Remaining</b>	£45,450	£45,450
<b>Predicted future spend</b>	£45,450	£45,450
<b>Predicted total spend</b>	£42,399	£45,450
<b>Predicted Variance</b>	£0	£0

**Budget Notes**

Income is negative due to an overpayment on an invoice issued by SEStran 23/24 that has been repaid in 24/25. No income beyond this correction is budgeted for this project

# EV Delivery

Budget Code: 92088  
 Responsible Officer: Michael Melton/Rebecca Smith  
 Manager: Brian Butler  
 RTS Objectives: 1, 4  
 Last Updated: 11/8/2024

**Programme Status:** Major Delay

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>•Engage with Scottish Government for effective national strategy/guidance/specifications on fleet decarbonisation and rollout of appropriate and future-proofed supporting infrastructure. This should include legislation to manage on street charging provision and the provision of chargers in new developments.</li> <li>•Work with the private sector and partners to develop a regional electric vehicle (and e-bike) investment and charging strategy, with associated technical guidance, including a spatial strategy across the area for long journey, rapid-charging facilities and for local area hub/community charging</li> </ul>
Project Summary
<p>This project seeks to support the development of common procurement documentation for public EV charging infrastructure in the SEStran and SWESTran regions. It will also recommend procurement approaches to be taken forward, whether this be a single regional procurement or several different procurement waves across the region with common tender documents. The overall project aim is to pool resource to create efficiencies for all LAs, and to secure an increased competition and better value in the final tender by presenting a bigger market for suppliers.</p>
Q1 Progress
<p>Agreement gained from all LAs (plus Dumfries and Galloway) to jointly develop public EV charging procurement documents. Formal governance structure put in place to oversee the project. Worked with TS to identify grant available to each LA to understand available budget. Ongoing discussion with CEC and a consultant with the aim of having a PM and project delivery support in place from early June.</p>
Q2 Progress
<p>Consultant procurement was completed later than anticipated, which has led to further programme delays, but overall these are minor and with end dates being delayed by around 1 month. Fortnightly working groups meetings are approx. monthly steering groups have taken place over the quarter with the aim of creating a procurement plan and documents that can be used by each LA, whether separately or as part of joint procurement(s).</p>
Q3 Progress
<p>Oversight group met in early October who agreed to proceed with a regional grouping of 8 LAs (minus East Lothian and plus D&amp;G) with a lead authority approach. Documentation defining this agreement will be developed as part of a new piece of consultancy work to support the collaboration. This requires a regional budget pooling together the remaining EVIF funding which is to be approved. Ongoing steering group meetings to progress the project with LA officers.</p>
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Form governance structure	4/30/2024	8/31/2024	4/30/2024	Complete	8/19/2024
Procure PM & consultant support	5/31/2024	6/7/2024	6/19/2024	Complete - Late	8/19/2024
Procurement docs complete	9/30/2024	10/31/2024	10/19/2024	Complete - Late	11/8/2024
Procurement begins (scope tbc)	10/31/2024	2/28/2025		Delayed	11/8/2024
Tender awarded (scope tbc)	5/30/2025	10/31/2025		Delayed	11/8/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£35,000
<b>Current Budget</b>	£0	£35,000
<b>Spend to Date</b>	£0	£0
<b>Remaining</b>	£0	£35,000
<b>Predicted future spend</b>	£0	£35,000
<b>Predicted total spend</b>	£0	£35,000
<b>Predicted Variance</b>	£0	£0

# Regional Bus Strategy

Budget Code: 92087  
 Responsible Officer: Rachael Murphy  
 Manager: Keith Fiskin  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/11/2024

Programme Status: On Target

Finance Status: Underspend

RTS Actions
<ul style="list-style-type: none"> <li>•Undertake a Regional Bus Connectivity study for non-Edinburgh travel to identify settlement pairs where travel demand is high and bus services are poor, as a means to promoting new routes and connectivity (in partnership with other policies)</li> <li>•Undertake a Regional Bus Priority study which will identify regional, cross-boundary, quality bus corridors and key bus priority interventions to reduce bus journey times and improve bus journey time reliability where Edinburgh is likely to be a focus</li> <li>•Deliver the bus priority interventions funded by Transport Scotland’s Bus Partnership Fund and subsequently identified by the Regional Bus Priority study</li> <li>•Review the bus powers detailed in the Transport (Scotland) Act 2019 and identify if they could be implemented across all or parts of the region within an integrated strategy to enhance the bus network</li> </ul>
Project Summary
<p>The RTS sees the bus network at the heart of the region’s public transport system, building alongside the National Transport Strategy (NTS2). Almost half (47%) of residents across the South East of Scotland used a bus service at least once a month in 2019 and patronage is building back. At SEStran’s June Partnership Board Meeting, the Towards a World Class Bus Service paper began the process of shaping a Regional Bus Strategy for the South East of Scotland.</p>
Q1 Progress
<p>Consultants procured (Systra + Stantec)                      Local Authorities and operators engaged                      Inception documents created                      EQIAs drafted                      Case for Change first draft shared with SEStran                      Summary shared as part of board papers</p>
Q2 Progress
<p>Increased Budget                      C4C shown to the board and accepted (ongoing drafting)                      As the study is so multi-faceted, the decision was signed off by the partnership director to draft the strategy's policies and actions before appraising a shorter list of options that are perceived by our authorities and stakeholders to be realisable.                      RBS main body in progress</p>
Q3 Progress
<p>Development of draft strategy policies and actions against a number of 'qualities' like service level is underway                      SEStran staff have read through these, and engagement resources are being developed for LAs                      The board, a smaller group from our IMF forum and operators will work through the document in Q4</p>
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Case for Change	5/17/2024	5/30/2024	5/30/2024	Complete - Late	8/26/2024
Draft actions and policies	12/31/2024				11/11/2024
Options Appraisal					

Budget		
	Income	Expenditure
<b>Original Budget</b>	£150,000	£225,000
<b>Current Budget</b>	£150,000	£175,000
<b>Spend to Date</b>	£150,000	£57,721
<b>Remaining</b>	£0	£117,279
<b>Predicted future spend</b>	£0	£117,279
<b>Predicted total spend</b>	£150,000	£175,000
<b>Predicted Variance</b>	£0	£0

Budget Notes
<p>Est budget reduced by £50k as it is now thought unlikely that the additional work required can be completed in 24/25 - it is expected a request will be made to carry this funding into 25/26 to allow the work to complete</p>

## Transport to Healthcare

Budget Code: 92062  
 Responsible Officer: Rachael Murphy  
 Manager: Keith Fiskin  
 RTS Objectives: 2  
 Last Updated: 11/4/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
• Support the delivery of bus services and infrastructure measures which ensure access to healthcare for all
Project Summary
Transport to health is a key service, connecting Scots with healthcare, from day-to-day appointments at the GP to hospital care. In 2019, the Mobility and Access Committee, working with Transport Scotland, produced MACS Report: Transport to Health and Social Care. This was strengthened by implementation last autumn of parts of the Transport (Scotland) Act 2019, which dealt specifically with Transport to Health. The Primary Health Directorate and Transport Scotland published their Transport to Health Delivery Plan draft. The draft puts an obligation on both health boards and regional transport partnerships to work together when considering transport to health.
Q1 Progress
1-1s with all four health boards, NHS Assure, Scottish Ambulance Service 1st group meeting with these stakeholders Project with Urban Tide progressing, but election means communicating project is paused *challenge* Want to see more leadership UT in meetings with CPC etc *challenge*
Q2 Progress
Update from CPC on how to talk to potential partners about TtH project with DfT funding Further meeting of TtH group and agreement on desire for 'learning network' for at least next six months
Q3 Progress
Building relationship with PHS and VHS Speaking about our work at PHS conference Keen to move towards decisions about next year's efforts with health boards but concerned that there's not sufficient impetus for a decision.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
First meeting with all boards	5/16/2024		5/16/2024	Complete	8/19/2024
Agreed projects for collaboration	8/31/2024	3/31/2025		Delayed	11/4/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£10,000
<b>Current Budget</b>	£0	£5,000
<b>Spend to Date</b>	£0	£0
<b>Remaining</b>	£0	£5,000
<b>Predicted future spend</b>	£0	£5,000
<b>Predicted total spend</b>	£0	£5,000
<b>Predicted Variance</b>	£0	£0

Budget Notes
Est budget reduced by £5k as it is now thought unlikely that this can be spent in full. Balance moved to Rail Strategy work in Newburgh to allow additional comms and marketing.

## Regional Freight Strategy

Budget Code: 92080  
 Responsible Officer: Keith Fisken  
 Manager: Keith Fisken  
 RTS Objectives: 1, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>Work with partners to identify, through the further development of the SEStran Freight Strategy, locations where Freight Consolidation Centres could be located</li> <li>Work with partners to identify, through the further development of the SEStran Freight Strategy, locations where gauge clearances should be increased to enable new and enhanced rail freight services to operate in the region</li> <li>Identify opportunities to implement innovation and automation in the freight and logistics industry in the region, including the delivery of relevant pilot projects</li> <li>Further develop proposals for new rail freight services, including a potential multi-user freight train running from Grangemouth and use of converted passenger trains for freight, as part of the development of the SEStran Freight Strategy</li> </ul>
Project Summary
<p>Within the RTS SEStran supports, where appropriate, the development of new or enhanced rail freight services in the region. Opportunities for innovative passenger train forming which incorporates the ability to carry freight should be explored combined with innovation and automation to increase the efficiency of freight and logistics networks across the region. The region should also support improved road freight services with better driver facilities and alternative fuel provision for HGV and LGV working with industry to transition from ICE power.</p>
Q1 Progress
<p>Submitted ACCESS for Goods project funding proposal with the University of West of England, feedback in July                      Reviewing regional freight study with stakeholders, will present at freight forum in May</p>
Q2 Progress
<p>EU FUSION - Developing draft for Horizon proposal with partners submission in September                      ACCESS for Goods proposal was rejected by funders, well received but a very competitive fund.</p>
Q3 Progress
<p>SEStran Logistics and Freight forum was held on 21st November with presentations on the regional strategy delivery plan and implications for freight and on further applications for drone use in the Hitrans region.</p>
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Present option to freight forum	5/30/2024		5/30/2024	Complete	8/19/2024
Access for goods funding feedback	7/31/2024		8/8/2024	Complete - Late	8/19/2024
Submit FUSION Proposal	9/6/2024		9/6/2024	Complete	11/11/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£10,000
<b>Current Budget</b>	£0	£10,000
<b>Spend to Date</b>	£0	£0
<b>Remaining</b>	£0	£10,000
<b>Predicted future spend</b>	£0	£10,000
<b>Predicted total spend</b>	£0	£10,000
<b>Predicted Variance</b>	£0	£0

## RTS Delivery Plan

Budget Code: 92042  
 Responsible Officer: Rachael Murphy  
 Manager: Keith Fiskin  
 RTS Objectives: 1, 2, 3, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** Risk of Underspend

RTS Actions
•Partner councils work with SEStran through the statutory planning processes to implement RTS policies with regards to major developments
Project Summary
Building on the ESESCRD and SEStran Concordat, this delivery plan will highlight projects Local Authorities want to develop that exemplify the themes and objectives of the RTS. By identifying these opportunities, we can make best use of CRD and SEStran efforts and actively pursue funding for these.
Q1 Progress
PID created, shared with group participants First meeting of group hosted, PID and matrix discussed Matrix editing begun
Q2 Progress
Matrix work continued, combined with GIS data from PIP Some delay due to summer holidays Commitment to host 1-1 meetings with LAs on their projects 1-1 meetings with RPF projects to gain context. Ewan drafting note.
Q3 Progress
Matrix is with LAs to share projects Discussion of best mapping procedure to consider the projects Discussion of role of Transport Scotland in the group's meetings Milestone on Baselineing of projects not achieved. This is due to the internal decision to meet with all the Regional Prosperity Framework leads individually, in order to fully understand their transport dependencies, which could be fulfilled by projects in the matrix. Doing this ourselves now will offer two obvious benefits: it's an opportunity to build relationships with RPF leads and it could reduce work (and thus cost) undertaken by a consultant in the next stage.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Project preparation	5/31/2024		3/31/2024	Complete	8/19/2024
Baselining	7/31/2024	11/30/2024		Delayed	11/11/2024
Matrix of projects	11/30/2024			On Track	8/30/2024
Procurement of consultant support	12/31/2024			On Track	8/30/2024
Identify Priority Project Phases	12/31/2024			On Track	8/30/2024
Develop wider RTS Action Plan	6/30/2025			On Track	8/30/2024
Drafting of RTS Delivery Plan Report	11/30/2025			On Track	8/30/2024

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£20,000
<b>Current Budget</b>	£0	£20,000
<b>Spend to Date</b>	£0	£0
<b>Remaining</b>	£0	£20,000
<b>Predicted future spend</b>	£0	£20,000
<b>Predicted total spend</b>	£0	£20,000
<b>Predicted Variance</b>	£0	£0

## Rail Strategy

Budget Code: 92047  
 Responsible Officer: Keith Fisken  
 Manager: Keith Fisken  
 RTS Objectives: 1, 3, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

RTS Actions
<ul style="list-style-type: none"> <li>Work with key stakeholders (Transport Scotland &amp; Network) rail to develop new rail infrastructure supported by appropriate appraisal and business case development</li> <li>Opportunities should be explored with partners to introduce new services, including more direct links across the region, national boundaries and cross-city connections</li> </ul>
Project Summary
Enhancements to rail services can deliver improved public transport connectivity. This could take several forms, such as more direct through services between locations, reducing the need for interchange on existing routes, and increased frequencies on particular routes or at key times of the day.
Q1 Progress
Developing response to TS comments on Newburgh appraisal for submission in May ECMA - SEStran participated in an officer group meeting in May
Q2 Progress
Newburgh community stakeholder meeting to support appraisal set up for September Quarterly rail meeting held with stakeholders on 4th September Winchburgh steering group in place to progress station development, will meet monthly
Q3 Progress
The Newburgh stakeholder event was held in Newburgh with great representation from numerous stakeholder group exploring the impact that a station could have on Newburgh and the surrounding area. The final addendum to the appraisal with notes from the meeting will be submitted to Transport Scotland in November for consideration SEStran attended the latest Winchburgh steering group meetings
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
n/a					

Budget		
	Income	Expenditure
<b>Original Budget</b>	£0	£2,500
<b>Current Budget</b>	£0	£7,931
<b>Spend to Date</b>	£0	£2,931
<b>Remaining</b>	£0	£5,000
<b>Predicted future spend</b>	£0	£0
<b>Predicted total spend</b>	£0	£2,931
<b>Predicted Variance</b>	£0	£5,000

Budget Notes
Est budget increased by £5k with underspend from Transport to Healthcare to allow additional comms and marketing for Newburgh. Also £431 overspend on budget for Newburgh event covered from Sus Travel Awareness

**People and Place Plan**



**People and Place Plan Budget**

Theme	Programme Name	Who delivers	Revenue Budget	Capital Budget	Total Budget	LA Rev Awards	LA Cap Awards	SEStran Rev Awards	SEStran Cap Awards	Third Party Rev Awards	Third Party Cap Awards	Total Rev Award	Total Cap Awards	Total Award	Rev Variance	Cap Variance	Total Variance
Schools and Young People	Active Ways to School	Third party	£490,450	£405,849	£896,299	£0	£0			£490,450	£455,849	£490,450	£455,849	£946,299	£0	£50,000	£50,000
Schools and Young People	Encouraging Active Travel: Young People	Local Authorities	£248,500	£231,650	£480,150	£224,500	£265,850			£0	£0	£224,500	£265,850	£490,350	£-24,000	£34,200	£10,200
Schools and Young People	Access to Bikes: Young People	Local Authorities & Third Parties	£0	£608,795	£608,795	£0	£65,000			£0	£458,795	£0	£523,795	£523,795	£0	£-85,000	£-85,000
Workplaces	Active Ways to Work: Large Employers	Third party	£25,000	£80,000	£105,000	£0	£0			£25,000	£80,000	£25,000	£80,000	£105,000	£0	£0	£0
Workplaces	Active Ways to Work: Other Employers	Local Authorities	£46,524	£135,000	£181,524	£24,000	£185,000	£38,130	£10,000	£0	£0	£62,130	£195,000	£257,130	£15,606	£60,000	£75,606
Accessibility and Inclusion	Street Audits and Enabling Facilities	Local Authorities	£0	£500,000	£500,000	£0	£460,800			£0	£0	£0	£460,800	£460,800	£0	£-39,200	£-39,200
Accessibility and Inclusion	Active Travel Hubs	Third party	£0	£150,000	£150,000	£0	£0			£0	£150,000	£0	£150,000	£150,000	£0	£0	£0
Accessibility and Inclusion	Existing Active Travel Hubs Communities support	Third party	£100,792	£334,390	£435,182	£0	£0			£104,768	£334,390	£104,768	£334,390	£439,158	£3,976	£0	£3,976
Accessibility and Inclusion	Encouraging Active Travel: Communities	Local Authorities	£566,600	£485,500	£1,052,100	£592,600	£470,500			£0	£0	£592,600	£470,500	£1,063,100	£26,000	£-15,000	£11,000
Accessibility and Inclusion	Access to Bikes	Local Authorities & Third Parties	£0	£431,016	£431,016	£0	£190,000			£0	£236,016	£0	£426,016	£426,016	£0	£-5,000	£-5,000
Accessibility and Inclusion	Regional AT Comms Campaign	SEStran	£50,000	£0	£50,000	£0	£0	£50,000	£0	£0	£0	£50,000	£0	£50,000	£0	£0	£0
Capacity and Capability Building	Behaviour Change Project Officers	Third party	£129,506	£0	£129,506	£0	£0			£129,506	£0	£129,506	£0	£129,506	£0	£0	£0
Capacity and Capability Building	Programme Management for 2024/25	SEStran	£100,000	£0	£100,000	£0	£0	£25,000	£0	£0	£0	£25,000	£0	£25,000	£-75,000	£0	£-75,000
Capacity and Capability Building	Programme Preparation for 2025/26 onwards	SEStran	£80,000	£0	£80,000	£0	£0	£52,502	£0	£0	£0	£52,502	£0	£52,502	£-27,498	£0	£-27,498
Capacity and Capability Building	Capability and capacity building development	SEStran	£15,000	£0	£15,000	£0	£0	£15,000	£0	£0	£0	£15,000	£0	£15,000	£0	£0	£0
Capacity and Capability Building	Programme level Monitoring & evaluation	SEStran	£40,000	£50,000	£90,000	£0	£0	£67,498	£50,000	£0	£0	£67,498	£50,000	£117,498	£27,498	£0	£27,498
Capacity and Capability Building	Contingency	n/a	£21,582	£0	£21,582	£0	£0	£75,000	£0	£0	£0	£75,000	£0	£75,000	£53,418	£0	£53,418
			<b>£1,913,954</b>	<b>£3,412,200</b>	<b>£5,326,154</b>	<b>£841,100</b>	<b>£1,637,150</b>	<b>£323,130</b>	<b>£60,000</b>	<b>£749,724</b>	<b>£1,715,050</b>	<b>£1,913,954</b>	<b>£3,412,200</b>	<b>£5,326,154</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>

**People and Place Plan Risk Register**

Risk Number	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due	Completed Actions	Status	Date Raised	Last Updated	Owner
PPP12	Funding allocation is perceived to be inequitable by some partners	Possible	Moderate	Medium Risk	Careful engagement with LA partners to coordinate activities and help them understand what factors have influenced 24/25 decisions Online tool developed for transparency on where all funding is being spent and results of this	Unlikely	Moderate	Low Risk	Consultation on draft future plan in October 2024 Meetings with LAs to be planned in Jan 25 to develop project proposals for 25/26	Monitoring tool live	In Progress	29/01/24	23/10/24	MM
PPP14	Reduction in revenue funding could lead to an inequitable programme that favours cycling over walking and wheeling and/or lacks capacity to engage with seldom heard groups	Probable	Major	High Risk	24/25 programme revised to retain revenue funding in key areas such as communities and walking/wheeling 25/26 plan to be built up from assumed revenue split to mitigate this impact from the start Programme wide 25/26 IIA to be developed along with guidance eon how this should be adapted at a project delivery level	Possible	Moderate	Medium Risk	As per planned response/mitigations 23/10/24		In Progress	25/03/24	24/10/24	MM
PPP18	Lack of resource to deliver projects within local authorities or third parties leads to slowed/no delivery on specific projects leading to underspend and/or failure to achieve anticipated impact	Probable	Major	High Risk	Grant monitoring process of reporting on anticipated spend in place and regular meetings with partners to understand any resource issues early. Identify projects more likely to underspend. Keep reserve list of projects that can be funded if underspend develops	Possible	Moderate	Medium Risk	Continue to develop and add to contingency projects.  Review underspend and available contingency with view to reaward by end of Nov.	Review reserve list of projects by 31/07. Develop proposal for contingency by 31/07.	In Progress	12/04/24	23/10/24	MM
PPP19	Lack of resource within SEStran to delivery on grant management, 25/26 plan development, comms, M&E, and capability building work. This could variously lead to ineffective grant management and/or a failure to deliver on elements of the plan	Possible	Major	Medium Risk	Budget set aside in Plan for staff resource based on estimate of time required LA and third parties distributed between the team to share workload	Unlikely	Moderate	Low Risk	Explore option for recruitment of additional resource to support with community fund in run up to 25/26 (aim to be in post by early Jan 25)	New Comms Officer started in Autumn.	In Progress	12/04/24	23/10/24	MM
PPP23	Change in funding priorities/ political agenda impacts the programme development work, potentially resulting in work needing to be redone or no longer needed	Probable	Major	High Risk	Development of 5 year plan to be flexible to changing priorities and ensure consultant is award of this need for flexibility Develop plan to allow for inclusion of public transport and integrated mode projects. TS have stated that sustainable transport measures will be included under future funding for PPP.	Probable	Moderate	Medium Risk	Meetings with LAs to be planned in Jan 25 to develop project proposals for 25/26 to include sustainable transport Case studies to be developed on existing projects to demonstrate value of investment	Delivery has been developed incorporating sustainable transport	In Progress	28/05/24	23/10/24	BHJ
PPP26	There is a risk of a cumulative effect of funding confirmation delays and delays to procurement of work being delivered by local authorities that leads to no/limited delivery and/or underspend	Probable	Moderate	Medium Risk	Ongoing discussions with LAs to understand problems early. Flexibility with grant process to move money between projects.	Possible	Moderate	Medium Risk	Consider options for 25/26 by 30/11		In Progress	03/07/24	23/10/24	BHJ
PPP27	There is a risks of mistakes / inaccuracy as we use Excel / Word documents instead of automatic system, which could lead to errors in grant claims, submissions to TS, on funding agreements etc	Probable	Moderate	Medium Risk	One Excel doc to track budget. Implemented budget change tracker. Automated cross checking.	Possible	Minor	Low Risk	Investigate cost benefit of alternative system in Q3		In Progress	03/07/24	23/10/24	MM
PPP28	A lack of capacity within local authorities results in either poor quality, inconsistent, or a lack of monitoring data being collected on projects, which lead to difficulty in demonstrating impact of funded projects to Transport Scotland and more widely	Probable	Moderate	Medium Risk	Continued engagement with LAs to understand what support can be offered in 24/25, but given current position within delivery year impact of this is limited Progress case study work with interested LAs to support what quantitative data can be collected	Probable	Moderate	Medium Risk	Develop plans for additional M&E support for local authorities for 25/26 during Q3		New	23/10/24	23/10/24	MM
PPP29	A lack of clear guidance alongside lack of capacity results in inconsistent monitoring data being collected on all projects, which complicates a programme level evaluation and leads to difficulty in demonstrating impact of funded projects to Transport Scotland and more widely	Probable	Moderate	Medium Risk	Continued engaged with all partners to understand what support can be offered in 24/25, but given current position within delivery year impact of this is limited	Possible	Moderate	Medium Risk	Procure evaluation consultant to support with 24/25 evaluation - by mid Q3 Develop plans for additional M&E support for all projects for 25/26 during Q3		New	23/10/24	23/10/24	MM

People and Place Plan Risk Register

Risk Number	Risk Detail	Gross Probability	Gross Impact	Gross Risk Score	Planned Response/Mitigation	Net Probability	Net Impact	Net Risk Score	Actions (inc who and date due	Completed Actions	Status	Date Raised	Last Updated	Owner
PPP30	Delays to award of 25/26 funding lead to reduced delivery period (and potential to miss summer delivery window) leading to underspend in the programme and/or reduced impact (also see issue ref PPP01 re 24/25)	Highly Probable	Moderate	High Risk	Work to TS timescales to ensure 25/26 plan proposals are submitted on time Take delivery plan and associated grant funding documents to December Board for approval to allow time to run processes prior to 31st March Plan timeline to ensure grant awards can be made in principle by 31st March subject to TS funding confirmation	Highly Probable	Minor	Medium Risk	Develop grant process documents - by 22.11 Develop grant application and award timeline - by 22.11 Discuss options for Board approval of P&P budget in principle in advance of funding outcome - during Q3		New	23/10/24	23/10/24	MM
PPP31	25/26 delivery proposals are not approved by Transport Scotland AO process, leading to no funding for 25/26 delivery	Unlikely	Catastrophic	Medium Risk	Ongoing engagement with TS to ensure alignment and answer any questions Iterative discussions with TS as plans for 25/26 progress	Remote	Catastrophic	Low Risk	As per planned mitigations 23.10		New	23/10/24	23/10/24	MM
PPP32	Community fund - Risk to SEStran reputation where projects are not successful in receiving funding. This risk is amplified by the lack of certainty of funding for 25/26 delivery.	Probable	Moderate	Medium Risk	Develop clear applications guidance and criteria to support applications and when confirmed make budget clear to manage expectations Ensure programme is sufficiently resourced to offer pre application support and guidance where necessary	Possible	Minor	Low Risk	As per planned mitigations 23.10		New	23/10/24	23/10/24	MM
PPP33	Community fund - Delivering the fund requires more or less work than expected, leading to either a lack or resource that impacts on other areas of delivery, or an over resourcing programme leading to lower value for money	Possible	Major	Medium Risk	Seek funding certainty from TS as early as possible to ensure size of fund and therefore resource needed can be identified. Given this dependency, no other mitigations are possible at this time	Possible	Major	Medium Risk	As per planned mitigations 23.10		New	23/10/24	23/10/24	MM
PPP34	Community fund - Challenge of recruiting for resource to help prepare the fund prior to 31st March with no funding certainty, which could lead to delays in launching the fund and/or knock on resource implication to other areas of delivery	Probable	Moderate	Medium Risk	Seek funding certainty from TS as early as possible to ensure resource needed can be identified. Explore shorter term options to recruit, including secondment from partner organisations.	Possible	Moderate	Medium Risk	As per planned mitigations 23.10		New	23/10/24	23/10/24	MM

### People and Place Issues Log

Issue Ref	Description	Severity	Next Steps (date and who)	Lessons Learnt	Status	Date Raised	Last Updated	Owner
PPP01	The funding confirmation from Transport Scotland was received in mid-April rather than mid-late March, which led to a knock on delay to SEStran Board approval for the budget, and subsequent funding awards not being issued until 2nd May, 1 month into the delivery year. This has reduced the delivery year from 12 to 11 months, resulting in impacts to project delivery and spend that require mitigation.	Medium	Discuss with each partner the impact of the funding award delay - complete Update spend profile and project budget based on these discussions - complete Retain flexibility for projects and budget to allow partners to pivot in case of knock on impacts of delays - ongoing Consider how Board approval could be sought in advance in future years - during Q3	tbc	In Progress	4/8/2024	10/24/2024	MM
PPP02	No funding can be accrued or claimed in advance for projects that will not complete by 31st March 2025 (with the exception of projects linked to the school year). This has affected one project - funding awarded to Sustrans for 2 officers to support Falkirk and West Lothian Council develop active travel behaviour change strategies. Given the delay to the funding award, recruitment took place later than expected, and only one post was filled. As these were envisaged as 12-month roles, the viability of the second officer (West Lothian) is now in doubt and may need to be removed from the programme, leading to an underspend of approximately £80k (revenue) in this programme area and potential lack of this project being delivered in West Lothian, with a potential knock on impact of delivery in 25/26.	Medium	Work with Sustrans to see if an internal secondment to the post would be possible - complete (was not possible) Develop contingency plan for use of underspend, to first prioritise delivery in West Lothian - Complete If no officer can be recruited, work with WLC to support development of plans for delivery in 25/26 - Complete Final sign off of budget reallocation - by 30th Nov 24	tbc	In Progress	7/3/2024	10/24/2024	MM
PPP03	Several delivery partners have raised concerns around the length of time taken to make grant payments to them, which has caused them issues with cashflow. At present, it can take 5-6 weeks from claim submission to payment, taking into account time to internally check claims (about 1 week), gain approval for payment within SEStran (2-3 days), and then for CEC to process payments (28 days)	Medium	Work with affected organisations to support claims in advance and/or mid quarter claims during Q2 - complete Review claim process to look for efficiencies and ensure payment timescales are clear - complete Discuss payment timescales with CEC - during Q3	tbc	In Progress	9/2/2024	10/24/2024	MM

## People and Place Plan - Local Authority Projects

Budget Code: 92092, 92093  
 Responsible Officer: Beth Harley-Jepson, Rebecca Smith, Sandra Lavergne  
 Manager: Michael Melton  
 RTS Objectives: 1, 2, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

Project Summary
This area of the PPP covers all grants to Local Authorities. Projects cut across all of the themes of the Plan as set out by Transport Scotland. In total, grants have been awarded to the 8 SEStran Local Authorities to deliver 78 projects.
Q1 Progress
Awards were made later than expected due to delay in received funding from TS, but all awards are now finalised and funding agreements have been issued. Inception meets have also been held with each LA to discuss reporting requirements. There were some minor changes to the budget between programmes in this area to accommodate changes to projects and priorities, but this has not resulted in any changes to the overall plan budget.
Q2 Progress
Reports and grant claims were received at the start of Q1 detailing spend to date and activities completed. Most projects here are running to plan, albeit most were not programmed to begin until Q2. Grant claims were slightly down on expected values, but not significantly so. Work has progressed over the quarter, with updates meetings being scheduled with all LAs towards the end of September.
Q3 Progress
Reports and grant claims were received at the start of Q3 detailing spend to date and activities completed. Overall, project progress has been good and (excluding the exceptions noted below) spend for non-local authority projects remains largely as expected, with a slight underspend across all projects in this area of around £30,000. Spend in this area has been further reduced by are=bout £140,000 due to 2 local authorities not submitting grant claims for Q2 - discussion with them have taken place and this spend is expected to be caught up in Q3 and A4. Progress meetings have generally been positive, and the next round of these will take place in December and January to discuss Q3 progress.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Project award	4/1/2024	4/30/2024	4/30/2024	Complete - Late	5/28/2024
Inception Meetings	5/31/2024		5/24/2024	Complete	5/28/2024
Q1 Reporting & Claims	7/12/2024		7/9/2024	Complete	8/5/2024
Q2 Reporting & Claims	10/11/2024		10/11/2024	Complete	11/11/2024
Q3 Reporting & Claims	1/17/2025			On Track	11/11/2024
Q4 Reporting & Claims	4/11/2025			On Track	11/11/2024

## People and Place Plan - Non Local Authority Projects

Budget Code: 92092, 92093  
 Responsible Officer: Beth Harley-Jepson, Rebecca Smith, Sandra Lavergne  
 Manager: Michael Melton  
 RTS Objectives: 1, 2, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

Project Summary
This area of the PPP covers all grants to third parties. Projects cut across all of the themes of the Plan as set out by Transport Scotland. In total, grants have been awarded to 9 organisations to deliver 14 projects.
Q1 Progress
Awards were made later than expected due to delay in received funding from TS, but all awards are now finalised and funding agreements have been issued. Inception meetings have also been held with each organisation to discuss reporting requirements. Once project has had its grant award increased by £3,976 due to a complexity around VAT - this has been covered by the overall plan contingency.
Q2 Progress
Reports and grant claims were received at the start of Q2 detailing spend to date and activities completed. Most projects commenced work in Q1, with good progress reported overall. One project has become undeliverable due to recruitment challenges, with alternative options for use of this funding being explored. Grant claims were slightly down on expected values, but not significantly so. Work has progressed over the quarter, with updates meetings being scheduled with all third parties towards the end of September.
Q3 Progress
Reports and grant claims were received at the start of Q3 detailing spend to date and activities completed. Overall, project progress has been good and spend for non-local authority projects remains largely as expected, with a slight underspend across all projects in this area of around £30,000. Progress meetings have generally been positive, and the next round of these will take place in December and January to discuss Q3 progress.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Project award	4/1/2024	4/30/2024	4/30/2024	Complete - Late	5/28/2024
Inception Meetings	5/31/2024		5/24/2024	Complete	5/28/2024
Q1 Reporting & Claims	7/12/2024		7/9/2024	Complete	8/5/2024
Q2 Reporting & Claims	10/11/2024		10/11/2024	Complete	10/31/2024
Q3 Reporting & Claims	1/17/2025			On Track	11/11/2024
Q4 Reporting & Claims	4/11/2025			On Track	11/11/2024

## People and Place Plan - SEStran Projects

Budget Code: 92092, 92093  
 Responsible Officer: Beth Harley-Jepson, Rebecca Smith, Sandra Lavergne  
 Manager: Michael Melton  
 RTS Objectives: 1, 2, 4  
 Last Updated: 11/11/2024

**Programme Status:** On Target

**Finance Status:** On Budget

Project Summary
This area of the PPP covers all funding being spent directly by SEStran. It covers some project delivery (including GoEbike and TravelKnowHow), communications, knowledge sharing, overall plan management and development, and plan wide monitoring and evaluation.
Q1 Progress
Due to later than expected funding confirmation, work has been delayed but it is felt at this point that this won't have a material impact on the overall programme. A tender has been awarded for plan wide monitoring and to increase transparency, and an additional tender will be awarded priority to the committee to support programme development. Work has begun to plan a knowledge sharing event in September. There have been no budget changes in this area, but it is expected that there will be some variance in Q2 as budgets for pieces of work become clear.
Q2 Progress
Progress in Q2 continues to be running to plan. Despite the late award of the programme development tender, this work remains on its original programme to report to the Board in December. A successful knowledge sharing workshop was held on 29th August with all 8 LAs being represented for a discussion on common approaches and areas of focus, as well as focusing on the 25/26 onwards plan development.
Q3 Progress
The focus of this workstream in Q3 has primarily been on completing work on the 25/26 and onwards P&P Delivery Plan and other processes for 25/26 that will require Board approval in December. To this end, a first draft of the Delivery Plan was shared with stakeholders for comment in early October, with responses currently being analysed and updated made as needed. The plan remains on track to be presented to the December Board where a fuller update will be given. Time has also been spent forward planning grant processes for 25/26 to seek Board approval where required in line with the Grant Standing Orders. Collaborative work has also been undertaken with SPT and Tactran on development of a community small grants fund.
Q4 Progress

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
Award monitoring tender	4/26/2024		4/26/2024	Complete	5/28/2024
Award plan development tender	5/31/2024	6/7/2024	6/7/2024	Complete - Late	5/28/2024
Q1 report to TS	7/12/2024		7/12/2024	Complete	8/5/2024
Q2 Knowledge Sharing Event	8/29/2024		8/29/2024	Complete	8/30/2024
Q2 Report to TS	10/14/2024		10/14/2024	Complete	11/11/2024
25/26 Plan consultation complete	10/25/2024		10/25/2024	Complete	11/11/2024
25/26 Plan approved by Board	12/6/2024			On Track	11/11/2024
Q3 Report to TS	1/17/2025			On Track	11/11/2024
Q4 Report to TS	4/15/2025			On Track	11/11/2024
24/25 evaluation report to TS	6/30/2025			On Track	11/11/2024



**RTP Active Travel People and Place Programme Reporting**

This template should be used by Regional Transport Partnerships to report quarterly on their Active Travel people and Place Programme grant progress. The focus of this report should be on financial management, outcome progress, and risk reporting.

<b>Name of Organisation</b>	<b>SEStran</b>	<b>Name of Programme</b>	Active Travel People and Place Programme
<b>Total Value of Grant</b>	<b>£5,326,154</b>	<b>Reporting period</b>	<b>Q2</b>

**The expected outcomes of the Grant are:** With due regard to (1) Regional Transport Strategies, (2) Local Authority programmes of active travel infrastructure delivery, (3) Community Planning Partnerships and Local Outcomes Improvement Plans (LOIPs), and in line with the national Active Travel Framework, to:

- Increase the proportion of short everyday journeys by walking, wheeling and cycling;
- Increase positive attitudes towards / increase propensity to walking, wheeling and cycling;
- Increase the proportion of journeys to school by walking, cycling and wheeling;
- Increase the frequency of walking, wheeling and cycling for pleasure / exercise;
- Increase positive perceptions of safety of walking, wheeling and cycling;
- Reduce the proportion of people identifying barriers to walking, wheeling and cycling;
- Increase the delivery capacity and capability of the active travel sector to better achieve these outcomes.

**The targets/milestones against which progress in achieving expected outcomes shall be monitored are:** In line with the People and Place Monitoring and Evaluation Framework:

- Quarterly reports including information on:
  - **Section A:** Narrative on overall progress;
  - **Section B:** Financial management;
  - **Section C:** Delivery against expected project outputs;
  - **Section D:** Risk management;
- Programme spend completed by March 2025.
- Final Evaluation Report submitted by end June 2025.



## RTP Active Travel People and Place Programme – Quarterly Report

### Section A. Summary:

Narrative on overall progress over the past quarter

As in quarter 1, the vast majority of the 100 projects funded across the SEStran area are currently on track and on budget. Where there are delays or budget underspends, these are being actively managed, and the full regional programme is on time and on budget. Meetings have been held with all except 1 of our 8 Local Authorities and 10 Delivery Partners at the end of Q2 to ensure good progress on project delivery and to mitigate any potential risks early on.

Claims for Q2 are coming in slightly under the budgeted amount, which is mainly due to no claims being received from Fife and West Lothian Councils (total value of both claims was expected to be around £180k) but this has been offset in part by other claims being above the projected values (about £20k) – see more detail in the financial management. The final Q2 claim will therefore include a small request for funding in advance to cover claims expected mid-quarter (to the value of £150k) meaning the final Q2 claim (subject to final checks) is expected to be £7,294 under the projected value.

Key project progress under the 4 themes (plus access to cycles) has been as follows:

- On **access to cycles**, Cycling Scotland are working to fund 400 bikes aimed at young people across the region, and The Bike Station's Wee Bike Library in Edinburgh has experienced demand almost double their capacity, with 394 loans so far this financial year. Cycling UK have distributed funds to 21 organisations across the region, including 96 bike repairs and 84 people now with access to a safe and appropriate cycle. East Lothian Council now have 1 Brompton Bike available for public hire in Prestonpans, with 3 more to follow in other towns in Q3.
- For **schools and young people**, intensive active travel programmes supported by dedicated members of staff are now underway in 7 high school clusters across the region. With the school holidays now finished and recruitment for new posts complete, the focus of these projects has been on delivery. A highlight of this have been a 'bike-packing' session run in West Lothian under the '#AndSheCycles' programme. On wider school engagement, WOW is now up and running in 55 schools in the region, and local authorities are working on delivering a number of projects directly including school travel plans in Clackmannanshire and installation of bike storage in East Lothian.
- Whilst a smaller element of SEStran's programme, progress in delivery in **workplaces** has been ongoing, with new cycle storage installed or currently being installed at 3 local authority workplaces in the region, several workplaces including the Scottish Legal Aid board are beginning work with TravelKnowHow in Edinburgh, and East Lothian Council have been planning an employer event. Our more intensive workplace project with NHS Fife has seen the delivery of the first ebikes for staff use, as well as the recruitment of 4 volunteer active travel champions to support the project from within NHS Fife.
- Under **accessibility and inclusion**, Cycling UK's Connected Communities hub in Haddington has continued to develop after being established in Q1, with 20 bike loans in the period. Work delivered by Local Authorities has seen a range of successes, from 38 secure cycle parking units being installed in Edinburgh in Q2 and subsidies now in place for users of the cycle lockers (including a 75% reduction in the fee per space in SIMD deciles 1-3), the East Lothian walking Festival and

## RTP Active Travel People and Place Programme – Quarterly Report

Midlothian Outdoor Festival completing successfully, Fife Council launching their [Share with Care](#) campaign and in East Lothian discussions are continuing around delivering active travel prescribing with NHS Lothian. Other highlights of this strand of work have included:

- The Thistle Adaptive Cycles project, which has supported 231 people across two sites in Edinburgh (Craigmillar and Saughton), and has established relationships with the Active Schools Network (ASN) in Edinburgh with four sessions arranged across October and November.
  - The University of Edinburgh, which has seen successful uptake of the UniCycles with 62 out of 70 hired out so far. 40 staff and students have requested and been offered one to one cycle training and, so far, 51 hours of training have been delivered to 17 individuals.
  - The Bike Statin, which ran a successful summer cycle events programme with a total of 98 attendees followed by an autumn programme with a total of 137 attendees.
  - Forth Environment Link rheumatology project with NHS Forth Valley, which progresses with 20 patients currently taking part and 4 being on waiting list.
- In building **capacity and capability**, the embedded behaviour change strategy officer has been progressing with the early stages of writing an ATBC Strategy for Falkirk Council. SEStran held a successful workshop to bring together all local authorities in the region, with all attendees rating the event good or excellent. An [online dashboard](#) is now in place to provide public information on all of the projects being funded, and discussions are ongoing around end of year evaluation. Finally, the first draft of SEStran's future People and Place delivery plan has been completed and issued to stakeholders for feedback.

There have been several common challenges reported across projects over the quarter:

- Local Authority procurement processes have resulted in project delays across several local authorities and project types, but particularly with cycle storage infrastructure.
- Across the range of cycle storage projects, there have been challenges around site selection and the need for more extensive enabling works than was expected.
- Storage of ebikes, particularly in local authority buildings, has not been possible in some areas due to insurance prohibiting this, which is impacting delivery of projects that relied on this. East Lothian Council are seeking external support to identify a technical solution to this that may be replicable across all LAs.
- Whilst recruitment had largely been successful for all projects, the timelines for this and the associated training time for new staff were underestimated in some projects which has led to project delays.

Looking ahead to Q3, some key projects milestones will be Fife Council's purchase of adapted cycles for use at outdoor sessions and across schools, the continued roll #/out of cycle parking at local authority workplaces and schools, delivery of active travel prescriptions in partnership with East Lothian Council and NHS Lothian and a trial of a bike library distribution model in the Falkirk high school cluster. SEStran will also complete work on the future People and Place delivery plan, presenting this to the Partnership board in December. A series of case studies will be prepared focusing on projects across the region, and work will continue to plan future knowledge sharing events.

## RTP Active Travel People and Place Programme – Quarterly Report

### Section B. Financial Management:

#### Part 1: Financial Claim:

Please provide details of any new financial claims made over the last period:

Date of Claim	Ref Number (if applicable)	Capital Claimed	Resource Claimed	Total Claim
22/07/2024				£96,680.44
12/09/2024		£830,388.61	£360,667.89	£1,191,056.50

#### Part 2: Historic Claims:

As a test check and financial audit, please list all claims you have made over the current financial year:

Date of Claim	Ref Number (if applicable)	Capital Claimed	Resource Claimed	Total Claim
14/06/2024		£294,604.53	£37,672	£332,276.53

#### Part 3: Financial Forecasting:

Each month Transport Scotland revises its financial forecast for the year. Please complete the below table with your expected claims that will be made for the coming year. We appreciate this may be high level and will carry a risk of significant change due to the nature of behaviour change programmes

Month	Expected Capital Claim	Expected Revenue Claim	Expected Total Claim	Month	Expected Capital Claim	Expected Revenue Claim	Expected Total Claim
Apr 2024				Oct 2024	£45,552	£114,633	£160,186
May 2024				Nov 2024			
Jun 2024	£294,605	£37,672	£332,277	Dec 2024	£972,648	£467,537	£1,440,185
Jul 2024	£14,732	£78,109	£92,841	Jan 2025	£108,072	£51,949	£160,021
Aug 2024				Feb 2025			
Sep 2024	£830,389	£360,668	£1,191,057	Mar 2025	£974,272	£682,879	£1,657,150

Please provide details of any payment to be accrued or paid beyond 31<sup>st</sup> March 2025:

Estimated £292,438 (£120,508 Rev, £171,930 cap) to be accrued and claimed in early April to account for invoices not received until on/soon after 31<sup>st</sup> March

## RTP Active Travel People and Place Programme – Quarterly Report

### Part 4: Over and Under Spend

Please provide any information on expected underspend or overspend that has developed or is at risk of developing as part of your investment (if possible, break it down by Capital/Revenue). Please also note any mitigation you are taking, and continue to inform your Transport Scotland Grant Manager:

The overall programme is currently running to budget, with no anticipated over or underspend. Within projects, a number of issues have been raised:

- Sustrans have been unsuccessful in recruiting the West Lothian behaviour change officer post – this has resulted in an underspend on this project of around £80k. Plans are in the final stage of approval to reallocate this to support iBike in West Lothian, so there is no wider programme impact
- Grant claims have not been received as anticipated in Q2 from Fife Council and West Lothian Council – for Fife Council this is due to the delay in purchasing adapted bikes which is due to now happen in Q3. Work is ongoing to understand the reasons for WLC not having submitted a claim
- The small programme contingency of around £40k has been allocated to delivery projects over the quarter to ensure it is spent
- Several other projects are reporting small underspends – a reserve project list is helping to reallocate these funds to ensure there is no impact on the overall programme spend

## RTP Active Travel People and Place Programme – Quarterly Report

### Section C. Delivery against expected project outputs:

Please provide examples of progress/delivery against expected project outputs under each of the People and Place themes. As well as successes we are equally interested in areas where there are delivery challenges to highlight or good practice/lessons learned to share.

<b>Active Schools and Young People</b>	
<b>Project Name</b>	<b>Access to Bikes – Young People</b>
<p><b>Outputs delivered to date</b>  <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>Cycling Scotland</b> – FEL supported to purchase bike fleet to distribute to 11 primary schools in Clackmannanshire, expected to complete distribution by December 2024. Six partnership projects under development across the region to distribute over 400 cycles in a range of settings.</p> <p><b>Clackmannanshire Council</b> - Requirement identified for an adaptive bike at Alva Academy. Discussion to be had with Council Wellbeing and Employability department to ascertain need for bikes for job seekers before decision made on adaptive bike purchase.</p> <p><b>Scottish Borders Council</b> - This programme will be delivered over the winter period, with school engagement taking place prior to October break, and the aim of resource acquisition and delivery taking place Nov-Feb.</p> <p><b>The Bike Station - Wee Bike Library</b> - There has been a large demand for the project. So far, they have delivered 394 bikes from their branches in Edinburgh. They have had 690 new sign ups in Edinburgh bringing their total to 1252 customers in Edinburgh since the start of the project in August 2023. They are increasing their data collection across the project to ensure the project is impactful across the community.</p>
<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Cycling Scotland</b> - Cycle parking and storage requests being out of scope has led to some organisations not being supported. Collaboration with organisations already engaged with young people has proved an effective route to getting cycles distributed and working with organisations and delivery partners experienced in bike procurement has streamlined processes.</p> <p><b>The Bike Station - Wee Bike Library</b> - The primary challenge in delivering the project is keeping up with demand with the ratio between customers and the number of bikes provided in Edinburgh being 2:1.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

Project Name	Active Ways to School
<p><b>Outputs delivered to date</b>  <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>Paths for All - Secondary School clusters Walking, Wheeling and Cycling programme</b> – A Development Officer for Schools has been working in Lasswade High School since the start of August. Q2 saw the delivery of the in- school assessment and the start of the promotional elements of delivery. An active travel survey has been administered to pupils; it shows that most pupils walk to school, with the bus being the second most popular option followed by being driven to school. Specific barriers that result in pupils being driven to school have been identified and conversations with key stakeholders are ongoing to address them.</p> <p><b>Sustrans – I Bike Schools</b> – In Q2, I Bike Schools has been active in 4 SEStran Local Authorities: East Lothian (12 schools and learning organisations), West Lothian (19 schools and learning organisations), Edinburgh (new colleague onboarding and planning) and the Scottish Borders (also new colleague onboarding and planning). A total of 155 activities were logged across these schools during Q2, with 1,582 pupil attendances.</p> <p>Some key figures:</p> <ul style="list-style-type: none"> <li>• 39 Cycling Skills sessions were held, with 369 pupil attendances and 11 school staff, supported by 7 regular volunteers.</li> <li>• 3 Family Cycle Skills sessions were held, with 25 pupil attendances and 56 other participants including parents and other children.</li> <li>• 3 Bikeability (National Standard) Cycle Training sessions were held, with 37 pupil attendances and 3 regular volunteers.</li> <li>• 23 Scooting Skills sessions were held, with 360 pupil attendances involving 24 school staff, supported by 1 regular volunteer.</li> <li>• 24 Led Rides were held, with 161 pupil attendances.</li> <li>• 13 Dr Bike / Dr Scooter sessions were held, with 113 pupil attendances.</li> <li>• 5 Bike / Scooter Maintenance Sessions were held with 6 pupil attendances.</li> </ul> <p>Activity in Q2 has been predominantly focused on planning and consolidation due to a large proportion of the quarter being taken up with the school summer holiday period. During this time, the I Bike Schools Officers ensured that all fleet equipment was serviced, maintained, and ready to use for the following school year. In addition, the Officers have reviewed all risk assessments and plans and attended training over the summer to provide fresh ideas and inspiration for the next delivery quarter.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

In West Lothian, the School Officer has spent time developing the *And She Cycles* (#ASC) offer, aiming at engaging more girls to find the confidence to cycle. Through this work, the after-school club at Whitburn Academy enjoyed a bike-packing experience, which has had a significant impact on the participants. With direct support from the I Bike Officer, the #ASC West Lothian group has been running weekly sessions, taking the group from non-riders to confident individuals. A teacher who took part in the session said: *“The bike-packing trip was absolutely brilliant! It was challenging for them, but what stars they are, especially considering most of them joined the cycling club last week. What an adventure, 13 miles each way of bike-packing. That's impressive with the terrain, hills, mud, rain, cow pat, wind, no reception, and you don't know where you are. Many had never really been on a bike before or been away from home. I'm super proud of them.”*

In East Lothian, the Officer has been taking stock over the summer, planning and consolidating their plans for the term ahead, and ensuring all equipment is serviced and ready for delivery when the schools return in August. Along with engaging children in active travel across 12 schools, the Officer has identified an opportunity among the parents to encourage more active travel which led to the creation of a group of mothers to encourage them to cycle to school with their children.

**Forth Environment Link - Community Active Travel Programme – Schools** – In Q2, FEL successfully recruited the Falkirk High embedded officer. Both the Alva Academy and Falkirk High Active Travel Hubs were officially launched through a series of assemblies for each year group. These assemblies served to introduce the project and Project officer to both pupils and staff, as well as to gather baseline survey responses. Pupils were encouraged to complete the survey using a QR code during the assembly, a method that proved effective as over 2,000 responses were received across the 8 school hubs. In the Alva and Falkirk responses, several pupils quoted distance and bad weather as their main barriers to walking and cycling. Data will be fully analysed in early Q3. Assemblies were followed by ‘roadshows’, interactive fun day showcasing FEL’s work; they engaged with over 1,000 pupils in Alva and Falkirk High. Bike to School Week took place from the 23rd to the 27th of September 2024. During this week, FEL organised several activities at both schools, including a bike breakfast, a school-wide Strava challenge, and free bike servicing for pupils. Bike lights were given out as prizes for pupils who took part and support cycling as winter approaches.

**Living Streets – WOW programme** – In Q2, Living Streets achieved the target of 55 primary schools registered for WOW in the SEStran area across 6 Local Authorities. The WOW programme officially launched early September 2024 and by the end of Q2, 45 schools were actively engaged (tracking over 10%) on Travel Tracker. Some key figures: 117.81k journeys have been logged, 86% of these journeys on average have been done actively. Living Streets also provided online and in-person support to schools across the region and were involved in a road safety workshop organised by the City of Edinburgh Council Road Safety team.

## RTP Active Travel People and Place Programme – Quarterly Report

<p><b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Paths for All</b> – The main lesson would be to start earlier in the year in making contacts in schools.</p> <p><b>Sustrans</b> – Significant decline in demand for virtual lessons, which used to be popular during lockdown. The number of schools signing up will be monitored and feedback sought from attendees to adjust the planning of these sessions.</p>
<p><b>Project Name</b></p> <p><b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>Encouraging Active Travel – Young People</b></p> <p><b>Clackmannanshire Council</b> – School Travel Plans are being revised with support from Living Streets. Recommendations and actions being addressed, such as banners for school railings being purchased (by Living Streets). School visits to Redwell, Craigbank and Sunnyside completed to understand issues. Living Streets targeting their WOW campaign in 5 primary schools, with active travel maps with new park and stride options being produced to present to parents. A contract for all cycling parking infrastructure (Young People and Employers combined) is now live on Public Contract Scotland with deadline October 2024.</p> <p><b>Scottish Borders Council</b> – YTD, over 550 pupils (P5 and P6 aged pupils) from 15 primary schools have received cycle safety training; a further 525 pupils across 27 schools are expected to receive training prior to the end of the financial year. P3 Cycle Skills pilot programme has started this academic term, enabling 64 pupils across 3 primary schools to receive core cycling confidence and competence training.</p> <p><b>Midlothian Council</b> - There has been a significant amount of background research and movement this project but not having the officer to drive this forward had created a delay. They have now recruited an officer and are confident of getting these off the ground and having these completed within the next quarter.</p> <p><b>East Lothian Council</b> - Major groundwork and installations took place throughout July and August at 4 x Primary Schools, increasing capacity to allow for storage of a further 70 bikes or scooters. Remedial works are now under way focused on the following:</p> <ul style="list-style-type: none"> <li>• Installing new scooter racks at 3 x Primary Schools</li> <li>• Relocating old cycle racks from Gullane Primary School to East Lothian Council’s Outdoor Learning facilities</li> <li>• Repairing damaged shelter roof panels at 1 x Primary School.</li> </ul>
<p><b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Clackmannanshire Council</b> – Identifying sufficient storage space in schools or school playgrounds has been challenging in some locations due to other infrastructure and access issues. As schools are visited the scale of storage issues becomes clearer.</p>



## RTP Active Travel People and Place Programme – Quarterly Report

**City of Edinburgh Council - Bike4ever** - A new staff member took over the project which required handover time. There has been difficulty releasing staff members to support. However, 12 pupils from Prospect Bank have completed 1 day of cycling training and skills and sessions are organised for Q3.

**Midlothian Council** – The procurement side of purchasing large scale materials and resources has increased the project’s lead time extensively. Once suppliers have been set up, they’re confident that purchasing will be significantly easier.

### Workplaces

Project Name	<b>Active Ways to Work- Large Employer</b>
<b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<b>Cycling Scotland</b> – At NHS Fife site, staff champions have been identified to promote the project with Greener Kirkcaldy. Some of the e-bikes have been purchased. Work has progressed to improve cycling facilities at NHS Fife Victoria Hospital with costed proposal agreed.
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	<b>Cycling Scotland</b> – Challenges around lack of funding for continuing the Cycling Friendly award support with workplaces.

Project Name	<b>Active Ways to Work – Other Employers</b>
<b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<p><b>Clackmannanshire Council</b> - Planning and Estates department have agreed on a location for new storage at Council HQ (no planning consent required). Sustrans Embedded Officer is now in post and will support Staff Travel Plan review.</p> <p><b>Travel Know How</b> – Within Edinburgh, progress has been made across the projects that commenced in Q1. The four projects have been condensed into three after discussion with City of Edinburgh Council who will now have a larger budget to include additional support. CalCommuter, a workplace commuting calculator, is now being piloted into some of the projects to enable instant carbon and cost information to users completing travel surveys.</p> <p><b>City of Edinburgh Council</b> - Looking at multiple incentives to get staff walking including Step Count Challenge places and investigating bike parking at Waverley Court. They are also liaising with Cargo bike Movement prior to purchasing cargo bikes for staff to ensure the appropriate cycles are bought.</p> <p><b>Midlothian Council</b> - Monthly staff walks are running with between 10 and 15 participants each session. Staff are provided a healthy lunch as an incentive.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

	<p><b>East Lothian Council</b> – A location for new staff cycle storage at ELC Outdoor Learning has been agreed and goods have been procured delivered and installed. New staff cycle storage for ELC site at Meadowmill is now complete and operational, with staff having access to secure, sheltered facilities that can be accessed via a shared PIN code. A Workplace Travel Forum Event is planned for October, with speakers invited, venue booked, and an invite issued.</p>
<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Clackmannanshire Council</b> - There is no baseline data currently for any storage/current cycling levels within the local authority. Currently identifying how to monitor behaviour change associated with capital items.</p> <p><b>Travel Know How</b> - There has been some delays in finalising surveys with employers, however these have been resolved and all surveys are set to go out to employers to collect data for the work. The mix of traditional, more in-depth surveys and piloting a more data-driven model (CalCommuter) will enable comparison and can allow for recommendations for future surveys across workplaces.</p> <p><b>Midlothian Council</b> - Significant research has gone into the cargo bike project with areas and teams identified for use of the bikes. There are logistical issues such as storage and bike batteries, however, a pivot to E-bikes available to staff has been suggested as a way of reducing barriers faced by their staff.</p> <p><b>East Lothian Council</b> - The forum event has been restricted by room availability, and therefore is being run in the same week as another county-wide event aimed at employers. To mitigate risk of low attendance as a result, ELC have decided to open the event out to all of the SEStran region to reach a wider potential audience and use this project to support the aims and objectives of colleagues across the region.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

<b><u>Accessibility and Inclusion</u></b>	
<b>Project Name</b>	<b><u>Active Travel Hubs</u></b>
<b>Outputs delivered to date</b> <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<b>CyclingUK</b> - Project is developing positively with a local delivery plan in place and considerable delivery underway, including led rides, cycle training and bike maintenance training (42), cycle loans (20) and events. Loan of e-trike being utilised by outdoor learning and replacing some van trips. Siting for a storage container has been agreed. Several local case studies from cycle loans provided.
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	<b>CyclingUK</b> – The challenge of e-bike battery charging has been resolved using a portable charging unit.
<b>Project Name</b>	<b><u>Access to Bikes</u></b>
<b>Outputs delivered to date</b> <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<p><b>CyclingUK - Cycle Access Fund</b> - Worked with 21 organisations to distribute £86,812 across cycle repairs, recycled, shared and individual strands. 96 repairs completed, 84 individuals with access to a safe and appropriate cycle.</p> <p><b>Clackmannanshire Council</b> - Follow up meeting with Wellbeing and Employability departments required to understand whether this funding will be required. Potential to reallocate this funding for adaptive bike in Alva Academy to support wider behaviour change funded programmes.</p> <p><b>Scottish Borders Council</b> – Bikes are being provided to service users, Just Cycle expect to meet their 110 bike target by the end of January 2025. Currently identifying direct engagement opportunities through SBC Employability Team and NHS Teams.</p> <p><b>Fife Council</b> – Currently sourcing adapted cycles and looking for suitable storage solutions for the bikes. Once purchased, they will be used at Lochore Meadows, Fife Cycle Park as well as within schools.</p> <p><b>East Lothian Council</b> – Brompton bikes are now in place at Prestonpans Library, Haddington Library, Musselburgh Library, and will soon be in place at Dunbar library. The hub in Prestonpans is now live and has completed a small number of hires. The hubs in Musselburgh, Haddington and Dunbar should go live in Quarter 3.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>East Lothian Council</b> – The original bike hire project was planned to use e-Bromptons, but these are currently unavailable for hire via Brompton. ELC had hoped to deploy the ebikes as pool bikes for ELC staff at least until a solution could be found for public hires. However, in September 2024 the Council’s insurance team advised that no ebike batteries could be charged in any council building. This means that even if Brompton were able to make ebikes live on their platform again, ELC would not be able to use any of our hubs to hire them out (as all are in ELC libraries). ELC are currently in the early stages of discussions with Cenex about a project to explore affordable solutions to charging infrastructure that will be more palatable to insurers.</p>
<p><b>Project Name</b></p>	<p><b><u>Encouraging Active Travel - Communities</u></b></p>
<p><b>Outputs delivered to date</b>  <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>Clackmannanshire Council</b> – Contract to deliver Dr Bike in schools and community bike maintenance sessions now live on Public Contract Scotland with tender deadline October 2024.</p> <p><b>Scottish Borders Council</b> – The Walk-It project has been running for over 15 years; the PPP funding has enabled the Council to recruit a Walk-It coordinator, to recruit and manage more volunteers, to set up new Walk It Walks and projects, to run training sessions such as Walk Leader courses, to work closely with Border Wheels on an action plan, etc. A separate Community Event fund &amp; Project grant is now set up and the Community Cycling fund will be managed through the previous full evaluation panel process and combined with the SBC Events funding. EOIs are being sought for projects from local organisations. One project has been fully delivered for the Tour of Britain 2024 activation. This opportunity allowed SBC to lead out all P7 pupils and teachers including two pupils with accessibility support for the start of Stage 1 of Tour of Britain at Kelso in September 2024.</p> <p><b>City of Edinburgh Council</b> – The Thistle Adaptive Cycles project has supported 231 people across two sites (Craigmillar and Saughton), and they have established relationships with the Active Schools Network (ASN) in Edinburgh with four sessions arranged across October and November. On-street secure cycle parking in residential areas has seen 38 units installed in this phase since July 2024. Most hangars have been reduced in price for users by 50% to £3/month, while those in areas of SIMD deciles 1-3 have been reduced by 75% to £1.50/month.</p> <p><b>Midlothian Council</b> – The Midlothian Outdoor Festival at Lasswade High was a very successful day showcasing cycling as well as having bike mechanics present to look over bikes for those who came to the event. The Midlothian App is entering its final step of procurement, but this has caused it to be slightly delayed. Quotes have been produced from several suppliers.</p> <p><b>Fife Council</b> - New campaign, ‘Share with Care – Active Travel’ has been launched - <a href="#">Share with Care - Active Travel   Fife Council</a>. Fife Council are currently developing banners, social media and bus advertising to support the campaign.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

	<p><b>East Lothian Council</b> – Work is progressing to install secure cycle storage at a location in Dunbar in partnership with Dunbar Harbour and Regeneration Trust and a local Architect to develop plans. Planning permission may be required, but can be covered by the grant to fund enabling works. Work continues on the Active Travel in partnership with colleagues from the NHS to integrate walking and cycling initiatives with the existing Exercise Referral Pathway in the primary care system in East Lothian. Cycling UK and GoJauntly were both brought into initial discussions to sketch out options for referrals. Bespoke challenges are currently being developed for the GoJauntly platform. The East Lothian Walking Festival was held 24 Aug – 1 Sep with PPP grant used to support:</p> <ul style="list-style-type: none"> <li>• Promotion and marketing</li> <li>• Providing refreshments for participants</li> <li>• Supporting sustainable travel options</li> <li>• Legacy walks on GoJauntly app</li> </ul> <p>The festival delivered approximately 50 walks/events (not including the Health Walks run by Ageing Well that were integrated into the festival). Ads were placed on the GoJauntly platform and the festival’s social media engagement was very effective in making more and wider connections.</p>
<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Clackmannanshire Council</b> – There is a need to ensure funding amplifies existing delivery in the region by other delivery partners, rather than duplication. Some of the work identified within the tender document will help shape funding for 25/26.</p> <p><b>City of Edinburgh Council</b> - There are issues with the storage of secure on street cycle hangers that have been purchased but not yet installed. The Council are investigating how this will impact the project.</p> <p><b>Midlothian Council</b> – The Active Travel video will potentially not be possible due to a lack of internal resources. This will be looked at more thoroughly in the next quarter to see if it is a possibility within this financial year.</p> <p><b>East Lothian Council</b> - It has proven very hard to tie down appropriate locations for shared cycle storage due to issues such as a lack of space and local objections to new infrastructure. This has led to the Dunbar secure shelter being behind schedule but remains on budget. A significant amount of lead time is clearly needed and ELC intend to take time to develop new processes in 2024-25 to help for next financial year.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

Project Name	<u>Street Audits and Enabling Facilities</u>
<p><b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>Scottish Borders Council</b> – Due to a significant number of high priority projects across the Local Authority area, the Council has undertaken a review exercise to identify key areas of work. It’s been agreed that a focus should be made in Hawick and Jedburgh; both towns have had their respective Place Plans published which include Active Travel and Accessibility. The Council will support the feasibility element as part of this project.</p> <p><b>Midlothian Council</b> - Areas have been identified for tool stations installation. These will be installed at hubs/leisure centres with cycle racks. First installation at Bonnyrigg is being completed over the summer. Audit of road markings needing repainted at schools has been completed and a priority list has been devised – these have been sent to outside company for works to be completed before the end of Q3.</p> <p><b>Fife Council</b> – The design Team appointed to help with School Travel Plan route audits and Way Finder project in Levenmouth area. Some of the audits have been undertaken, feasibility and cost estimates are being developed.</p> <p><b>East Lothian Council</b> - A full audit of Tranent, Prestonpans and Haddington has been completed, with results uploaded to ELC’s own system for logging street works. Audits were informed by input from local residents, and are now complete. A review of the logged interventions has taken place, and we are currently working on a suite of designs to improve the centre of Tranent for walking. These designs will be progressed to completion next Financial Year.</p>
<p><b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>Midlothian Council</b> – There’s been a lack of in-house resources to deliver the tool station project.</p> <p><b>East Lothian Council</b> - Construction for these works was due to complete by the end of this Financial Year but this will not now be possible, with a focus instead on increased number of audits and on designs only this year to ensure budget is spent in full, with a view to completing the works next FY.</p>
Project Name	<u>Existing Active Travel Hubs Communities support</u>
<p><b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>University of Edinburgh</b> – The University has recruited a new Active Travel Engagement Officer who has been leading on the work. There has been successful uptake of the UniCycles with 62 out of 70 hired out so far. 40 staff and students have requested and been offered one to one cycle training and, so far, 51 hours of training have been delivered to 17 individuals. Several cycling training sessions have been organised for Q3 and they are planning audits of walking-wheeling routes to support commuting journeys.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

	<p><b>The Bike Station - Kids Bike Life</b> - A successful summer programme was run with a total of 98 attendees followed by an autumn programme with a total of 137 attendees. In the meantime, canvassing was completed with schools in the catchment areas identified. They have several sessions planned and have priorities for Q3 including extending activities in areas where reach has been smaller.</p> <p><b>Forth Environment Link – Community Active Travel Programme</b> – In Q2, FEL further developed plans for embedded community partnerships. They engaged with existing connections such as The Hub in Alloa, Mining Landscapes, Tamfourhill Community Hub and are in discussion with groups in Bonnybridge, Gartmorn and Sauchie. All partnerships will be finalised more formally in Q3. Procurement of all bikes and ebikes has been concluded in Q2. Distribution of the bikes in the Clackmannanshire schools started in Q2 and will continue in Q3. A trial of a bike library distribution model will take place in the Falkirk schools and has been identified as an opportunity for collaboration with Falkirk Council. The rheumatology project progresses with 20 patients currently taking part in the process and 4 being on waiting list. Tailored support will be provided to the patients for the remainder of the project.</p> <p><b>Greener Kirkcaldy – Routes to Change</b> - GK have established an itemised list of changes, improvements and additions for their high street location to progress the change to a focal point for active travel advice and support in the area, with the active travel hub the principal part of the location and Lang Toun Cycles bike shop as a recognisable concession within the unit. Initial baseline assessments have been conducted with partner groups in Glenrothes, Burntisland, Cardenden, Kinghorn and Aberdour to inform what support and activities to deliver in these areas. Engagement with people across Fife with in-person and online events, campaigns and conversations has been going very well. The highlight of this has been participation in the Fife Climate Festival which had multiple events across Fife at the end of September. Priorities for next quarter include developing programmes of winter activities in collaboration with partner organisations to keep momentum going, finalising decisions on what form the mobile active travel hub will take, and finalising decision of what the active travel hub will be called, via conversations with stakeholders.</p>
<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p><b>University of Edinburgh</b> - The bikes, which were inherited from the Just Eat Cycle Scheme, were designed to be suitable for a broad range of heights, however, the university are finding that they are generally not suitable for hirers shorter than 5'4". In general, smaller students are finding the bikes are too big and heavy to use safely (34Kg).</p> <p><b>The Bike Station - Kids Bike Life</b> - They have been looking at ways to evaluate with school children as their existing model of survey is not effective. There is a difficulty getting schools engaged in the Niddrie area, but they are reaching out again and contingency planning.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

	<p><b>Forth Environment Link</b> - Balancing recruitment and induction pressures of new school staff has been a challenge this quarter and has had impacts across both teams in terms of capacity.</p> <p><b>Greener Kirkcaldy – Routes to Change</b> - There have been some challenges in maintaining contact with some identified groups due to a combination of staff changes, funding challenges and their voluntary nature. However, where GK have established strong working relationships, the progress and enthusiasm of those groups has been very encouraging. There have also been difficulties in deciding what form the mobile active travel unit should take – with conversations going from deciding if it should be a trailer or van, then deciding if the van should be diesel or electric. With the mobile unit being a significant portion of the capital spend of this project, GK feel that taking time to get this right is worthwhile.</p>
<b>Project Name</b>	<b><u>Regional AT Comms Campaign</u></b>
<p><b>Outputs delivered to date</b>  <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i></p>	<p><b>New SEStran Communications Officer</b>            SEStran has recruited a new Marketing and Comms Officer who will be supporting some of the People and Place Comms work. This will support our aims to raise our profile and develop a clearer picture of available funding across the region.</p> <p><b>Case Study Support for Local Authorities</b>            Additionally, we have offered case study support to local authorities. The rationale behind this was that it would offer capacity at a local authority level to promote the work being carried out. Three local authorities are signed up to produce a video case study in collaboration with SEStran: East Lothian, Edinburgh, and the Scottish Borders. We have met relevant colleagues from their teams and are now scoping out suggested ideas to create a project plan and procure external support for the production of the case studies.</p>
<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	



## RTP Active Travel People and Place Programme – Quarterly Report

<b>Capacity and Capability</b>	
<b>Project Name</b>	<b><u>Behaviour Change Project Officers</u></b>
<b>Outputs delivered to date</b> <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<b>Sustrans</b> – The Behaviour Change Strategy Embedded officer in Falkirk Council has met with key internal stakeholders, has populated a community profile document for the different districts in the Local Authority and included information on target geographies and population segments. Local community Stakeholder mapping is underway. A structure for the overall strategy has been drafted.
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	<b>Sustrans</b> - Establishing a good and strong working relationship with Falkirk Council has been critical for the Embedded Officer, but there have been challenges in trying to gain input from outside the core transport team.
<b>Project Name</b>	<b><u>Programme Management for 2024/25</u></b>
<b>Outputs delivered to date</b> <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	SEStran's management of 24/25 delivery is ongoing, with general feedback form partner that the approach taken has been well received. Outside of work captured elsewhere in this report, this has included Q1 grant claim processing, Q2 reporting meetings with each LA and delivery partner, visits to several projects to understand how the funding is being used, organising a Cab Sec visit to several projects, and general day to day project management.
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	
<b>Project Name</b>	<b><u>Programme Preparation for 2025/26 onwards</u></b>
<b>Outputs delivered to date</b> <i>(A description of this project's key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	Over the quarter, the first draft of the future delivery plan has been prepared following 1-1 meeting with each LA, each currently funded organisation plus other potential partners and a workshop session with all LAs. The plan has now been issued to various stakeholders for comment, and will be finalised in mid-November.
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	There have been various challenges in this piece of work, including the lack of a clear evidence base, tensions between setting a regional delivery plan and input from local communities/identification of local barriers, requirements to plan without definitive budget and lack of 24/25 monitoring data to inform decision making. These have all been mitigated as best as possible in the delivery plan work.

## RTP Active Travel People and Place Programme – Quarterly Report

<b>Project Name</b>	<b>Capability and capacity building development</b>
<b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<p>In August 2024, SEStran organised its first shared-learning event in Edinburgh, bringing officers from the 8 Local Authorities together to share best practices, network and gain a better understanding of the current projects being delivered in the region as part of the People and Place plan. The event was a good opportunity for attendees to discuss key topics such as monitoring and evaluation, active travel in a rural context or partnership working with community organisations. Presentations were delivered by Local Authorities and another RTP, outlining project successes and best practices. The event was also an opportunity to discuss further the 5-year delivery plan which has been developed in collaboration with Jacobs. Overall, the feedback received has been very positive and leads to believe of a strong appetite among Local Authority officers to take part in similar events / workshops in the future, which we are currently investigating.</p>
<b>Delivery challenges / lessons learned</b> <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i>	
<b>Project Name</b>	<b>Programme level Monitoring &amp; evaluation</b>
<b>Outputs delivered to date</b> <i>(A description of this project’s key achievements, milestones met, progress against objectives, priorities for next quarter)</i>	<p><b>SEStran People and Place dashboard</b></p> <p>Progress has been made on the online dashboard in collaboration with UrbanTide; it has been populated with the locations of the funded projects across the region. In Q2, <a href="#">the dashboard</a> has been published and is accessible to all. The next step will be to develop the capability for external data entry into the tool which should help assess potential impact of projects.</p> <p><b>Active Travel counters</b></p> <p>We’ve sought interest from Local Authorities to purchase and install active travel counters with the aim of monitoring active travel behaviour change interventions or active travel rates more widely. Two Local Authorities have expressed an interest, Clackmannanshire Council and Scottish Borders Council. In the next quarter, we’ll need to assess and decide on the most suitable types of counters, the potential locations and the procurement approach.</p> <p><b>People and Place Programme Evaluation</b></p> <p>We’ve recently issued a tender to develop a Programme Evaluation report of the 24/25 People and Place Plan in the SEStran area. It is expected that this consultancy work would include an analysis of SEStran’s grant management role, a Programme Evaluation report, and an audit on project delivery. The deadline for submission is Monday 28<sup>th</sup> October, with an anticipated contract award expected on the w/c Monday 4<sup>th</sup> November.</p>

## RTP Active Travel People and Place Programme – Quarterly Report

<p><b>Delivery challenges / lessons learned</b>  <i>(A description of challenges, difficulties, lessons learned, particularly if these may have relevance nationally or for partners across the programme)</i></p>	<p>Whilst initially the intention was to carry out the 24/25 programme evaluation in house, given the volume of data that is now expected and the timescales overlapping with getting the 25/26 programme underway, a decision has been taken to seek external consultant support for this now rather than waiting until to determine workload in Q1 25/26.</p>
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### Section D: Risk Management:

Please note any risks that the programme is carrying.

Risk	Level of Risk	Mitigating action to prevent or reduce the residual outcome of the risk