

## **PEOPLE AND PLACE PLAN**

### **1. INTRODUCTION**

- 1.1 The purpose of this report is to present to the Partnership Board an outline of the People and Place Plan, including work carried out to date, future plans, and the management of grant funds in 2024/25. Approval is also sought for the grant eligibility criteria and assessment process for the accompanying grant fund.

### **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 further discussions and confirmation of objectives with TS at the end of 2023, work commenced in early January 2024 on developing a proposal to invest SEStran's share of the funding (£5.7million) in 2024/25, subject to sign off by Transport Scotland in March. This proposal was required to meet criteria set out by TS, and be formed around 4 key themes that they had identified:
- Schools and young people
  - Workplaces
  - Accessibility and inclusion
  - Capacity and capability building
- 2.3 The timescales set out by TS have been particularly challenging, but have at all times been met by SEStran. The first draft plan was submitted to TS as requested on 26<sup>th</sup> January, with the final version submitted to TS in advance of the final deadline of 21<sup>st</sup> February. To provide additional capacity to work to these compressed timescales, Jacobs were commissioned, with costs covered by TS, to work alongside the SEStran team.
- 2.4 Given the significant change to SEStran's budget (subject to TS approval) that this new funding will entail, work has been overseen by a Steering Group. Discussions have also been held with SEStran's internal and external auditors, solicitors and Secretary.

### **3. MAIN REPORT**

3.1 This report will provide Members with:

- A copy of the regional plan, and an explanation of how this has been developed in collaboration with our partner Local Authorities
- The grant eligibility and assessment criteria for the accompanying grant fund in line with the Grant Standing Orders.

#### **3.2.1 The Regional Plan**

A copy of the regional plan that has been submitted to TS for approval is attached at Appendix 1. In developing this plan, extensive discussions have been held with local authorities to ensure that the plan meets their local priorities, as well as aligning with the Regional Transport Strategy and national objectives set by TS. As part of this process:

- Each Local Authority was asked to submit a list of proposals that they would like to progress in 24/25
- To discuss this in detail, a meeting was held with each local authority, followed by various follow up discussions as required
- Three workshops were held with all 8 Local Authorities, to gather collective feedback and to provide opportunities for cross Local Authority collaboration

3.2.2 Alongside the Local Authority engagement, recognising that the majority of delivery in 2023/24 was led by third party organisations (including the ATDPs), the following was also carried out:

- Extensive background research to understand exactly what behavior change projects were being run across the region in 23/24
- Discussions were held with all 6 ATDPs, plus 3 larger community based organisations, to understand how they could support delivery of the 24/25 plan in line with the identified priorities

3.2.3 To supplement the above, background evidence on the previous success of measures within and outwith the region was undertaken, alongside ongoing discussion with the other RTPs.

3.2.4 The result of this engagement and research is a plan that has been developed in three consecutive phases, each building on the previous, to produce a robust, evidence based, and deliverable People and Place Plan for 24/25:

- Identification of high-level priorities for the Plan, and an accompanying high-level approach which fed through to, and reinforced, the subsequent stages.
- The intermediate level identification of a range of regional programmes that supported the high-level approach, and enabled the detailed projects to be focused on the overarching priorities
- The low-level identification of individual projects across the region, that will deliver on the above to form a coherent regional plan

Further detail on this approach and the content of each programme area will be provided in a presentation to the Board.

3.2.5 Following the development of this Plan, Transport Scotland advised on 8<sup>th</sup> March that, due to budget constraints, the funding available to RTPs would require to be reduced by 5% overall, and the proportion of revenue compared to capital amended from 60/40 to 40/60. This required reworking of the Plan to accommodate a £1.5million (or 44%) reduction in revenue funding, and mitigating the impact of this. A revised programme level cost breakdown is presented at Appendix 2 which should be viewed alongside the Plan at Appendix 1.

- 3.2.6 In reworking the Plan, we have stuck to the following principles:
- The original prioritisation and programme refinement that was carried out with Local Authority input remains sound and should be maintained
  - We have saved on programme management and development costs first, followed by project delivery costs
  - We have retained enough revenue funding in each programme to affect meaningful behaviour change
  - We have prioritised existing measures over new delivery areas given the last minute nature of this change
  - Funding for local authorities has been retained at the level of the previous plan, albeit with a revised revenue/capital split, but retaining as much revenue as possible (i.e. less than the 44% reduction overall)
  - We have mitigated as best we can the equality impact of the loss of revenue funding, by maintaining revenue funds in community projects that will reach seldom heard groups

### 3.3.1 **Distribution of funds**

Alongside the development of the Plan, significant work has been undertaken to identify appropriate governance arrangements around the distribution of the People and Place Plan funds in 2024/25.

3.3.2 Following discussions with SEStran's Secretary, legal advisors, and contacts within City of Edinburgh Council, Grant Standing Orders have been developed and are presented elsewhere on the Board agenda.

3.3.3 £2,517,593 of the People and Place funds are proposed to be granted to SEStran's 8 partner local authorities in line with section 10 of the Grant Standing Orders. For the distribution of grant funds to Local Authorities, the following robust criteria have been developed, shared with Local Authorities, and approved by the Partnership Director to assess each proposal:

- Measurable impact
- Deliverability within 2024/25
- Location (both ensuring a geographic spread and tie ins with existing infrastructure)
- Fit within the programme budgets

As it is anticipated that all grants will be less than £1million, the approval for individual grants will be carried out by the Partnership Director in line with the assessment process above. If any grants are proposed to be in excess of £1million, these will be escalated to the Performance or Audit Committee or Partnership Board for final approval as per the Grant Standing Orders.

3.3.4 £2,318,561 of the People and Place funds are proposed to be distributed to third parties via the People and Place Grant Fund. For the distribution of this fund, an open grant fund is proposed. In line with the Grant Standing Orders, as grants are expected to be in the range of up to £1million, the grant eligibility and assessment criteria 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 Plan
- The types of organisations that can apply
- The assessment process to ensure best value

As it is anticipated that all grants will be less than £1million, the approval for individual grants will be carried out by the Partnership Director in line with the assessment process presented here. If any grants are proposed to be in excess of £1million, these will be escalated to the Performance or Audit Committee or Partnership Board for final approval as per the Grant Standing Orders.

3.3.5 The remaining £490,000 will fund regional measures, some of which will be delivered directly by SEStran, and some will cover elements of programme development that will be procured from consultants. This includes a £100,000 of programme management budget to cover the resource cost to SEStran of delivering the People and Place Plan in 24/25.

3.3.6 Given the late changes required to be made to the overall programme budgets, the figures given above in 3.3.3-3.3.5 are liable to some variation as the impact of this is fed down into individual projects, and a verbal update on these will be provided to the Board. As such and to allow a flexible approach to ensure the best projects are delivered in 24/25, delegated authority is also being sought to vary the total value of the People and Place Grant Fund (£2,318,561) by up to 10%, which would involve corresponding changes to the funding pots noted at 3.3.3 and 3.3.5 so the total cost remained within the allocation from Transport Scotland.

#### 3.4 **Ongoing Monitoring**

Given the scale of the People and Place Plan, to ensure that the Board has suitable oversight of the delivery phase it is proposed that a detailed quarterly report is provided to the Performance and Audit Committee

### 4. **RECOMMENDATIONS**

4.1 The Partnership Board is asked to:

- Note and discuss the content of this report and the People and Place Plan at Appendix 1, with revised programme budgets in Appendix 2

- Approve the eligibility criteria and assessment process for the £2,318,561 People and Place Grant Fund at Appendix 3 in line with the Grant Standing Orders, and delegate authority to the Partnership Director to vary the total value of the People and Place Grant Fund by up to 10% in line with the 24/25 budget and the total People and Place Plan budget.

Michael Melton  
**Programme Manager**  
 12<sup>th</sup> March 2024

**Appendix 1:** SEStran 2024/25 People and Place Plan

**Appendix 2:** SEStran 2024/25 People and Place Plan – Updated programme budgets

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

Policy Implications	The People and Place Plan aligns with the objectives of the RTS and therefore will help deliver on SEStrans' policy objectives
Financial Implications	Project management costs for 2024/25 have been 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 travel, including a focus on the provision of adaptive bikes and a programme focused on physical barrier removal on pavements. An EqIA is to be undertaken on the Plan and any recommendation from this will be incorporated where possible.
Climate Change Implications	In promoting behaviour change from private cars to active travel, the People and Place Plan will support the transition to net zero.

## SEStran People and Place Plan: summary

### Introduction

Transport Scotland have invited Regional Transport Partnerships to apply for People and Place funding. The funding is intended to enable the delivery of behavioural change projects which would increase rates of active travel (walking, wheeling and cycling).

The funding largely replaces that currently provided by Transport Scotland to the Active Travel Delivery Partners (Cycling UK, Cycling Scotland, Living Streets, Paths for All, Scottish Cycling and Sustrans) to achieve similar outcomes, and is expected accompanied by some further direct funding for related projects to be awarded by Transport Scotland directly to Local Authorities.

A total of nearly £5.7M is available to SEStran for the 2024/25 financial year, of which 60% is funding for revenue expenditure and 40% for capital investment.

This note:

- Outlines the approach to the development of the People and Place Plan for South East Scotland
- Describes the Plan for 2024/25
- Summarises the benefits that the Plan will deliver
- Lists the key risks which SEStran has identified and is mitigating

### Approach to plan development

In order to develop a delivery plan for 2024/25 that details individual projects, SEStran has taken a robust strategic approach that meets Transport Scotland's objectives, as well as those of the Regional Transport Strategy and Local Authorities' plans, and carried out extensive background research on current delivery of active travel behaviour change in the region.

SEStran's guiding principle is that we want to work collaboratively with our Local Authority partners and others to develop and implement a plan that benefits the region and each Local Authority, and the communities that we serve, rather than acting purely as a grant funder. We do not simply wish to run the same projects in the region as have been run previously and defining the most effective and best value new projects, along with the right delivery agent for them, is a significant task. Much work on this has been completed during the development of this plan, including many helpful discussions with all eight of our Local Authorities, the six Active Travel Delivery Partners, as well as a small number of larger community based organisations, and it will continue as we move into the delivery phase.

By so doing, we will realise a collaborative approach between SEStran and our regional People and Place plan, the local behaviour change projects led by Local Authorities and other partners, and other transport projects that promoting active travel through behaviour change could complement.

### Summary of proposed investment

SEStran's People and Place plan will deliver measures that encourage and enable more people to walk, wheel and cycle more often. It will enable a significant contribution to be made to the region's transport priorities, including the Regional Transport Strategy's actions to deliver safe active travel which include (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"
- "Expand the provision of bike-sharing initiatives across the region"

and policies to reduce car kilometres which 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”
- “The RTS will support the national, regional and local behaviour change and demand management Route Map interventions to encourage a long-term, sustainable change to daily public transport/active travel habits”

The plan will work in all of the region’s eight Local Authority areas to provide a balanced package, based on the regional priorities, targeted at each of the four themes which Transport Scotland has suggested should form part of People and Place plan:

- Schools and young people
- Workplaces
- Developing accessible and inclusive communities
- Capacity and capability building within the public sector and community-based organisations

The plan includes both capital and revenue elements. It has been developed mindful of the need to deliver investment of the full grant award within the 2024/25 year and achieve best value.

Our plan has been formed based on a comprehensive review of all types of investments that might offer good value, and collaboration with our partners, and is based on a prioritisation process of potential measures which combines:

- Guidance provided by national, regional and local policies and strategies
- A review of extant and planned behaviour change activities in the region, seeking to ensure that the regional plan complements them
- A review of evidence of what works to support a change in behaviour towards active travel, in order that better value measures can be identified

The plan seeks to combine best practice and experience (to drive value for money) with innovation, recognising that the 2024/25 year is one of transition before what we hope will be a long-term plan in future years.

SEStran and our Local Authority partners are receptive of the changes to the investment mechanisms for delivering active travel behaviour change interventions and are looking to progress new pathways in order to increase the efficiency of delivery of relevant outcomes.

### **Affordability and value for money**

SEStran understands the imperative of driving increased value from investment in active travel behaviour change. Additional value for money will be achieved through growing and utilising community capacity to deliver change, and also by SEStran facilitating exchange of knowledge between our Local Authority partners and with other Regional Transport Partnerships. We will also explore the opportunity to achieve greater value by working across RTPs following finalisation of each region’s plan.

We are seeking, within the 2024/25 transition year, to get the right balance of projects which bring proven high value with the aspiration to give the opportunity for some new approaches to be trialled where they are likely to support regional objectives.

We have learned the lessons from delivery of active travel behaviour change projects to date, which suggests that better value is achieved if:

- Local stakeholders are actively supportive of projects
- Interventions are targeted towards specific audiences (and not spreading investment too thinly)
- Project messages and the tools used are closely aligned to objectives and specifically relevant to target audiences

- Projects provide cohesive packages of measures that both encourage and enable changes in behaviour
- Interventions are focussed on life events that can influence travel choices (such as starting or changing school or job) or that complement existing active travel infrastructure
- The target audience(s) perceive the projects to be delivered to high quality
- The projects are of sufficient scale to achieve value
- Sufficient time is available to for a project to become embedded within its target community, 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

We will seek to ensure that all these factors are incorporated into the planning and delivery of every aspect of our People and Place plan.

We will ensure that financial spend is fully completed within the financial year, with the required split of capital and revenue investment.

### **SEStran People and Place Plan 2024/25**

SEStran's funding proposals are outlined in the table below. They are the outcome of the detailed strategic work undertaken as described above, which has guided the distribution of investment between the different proposals in the following ways:

- We seek to invest in robust project management and monitoring & evaluation in the plan's transition year of 2024/25. This will ensure that the programmes are properly embedded, working well alongside complementary projects and programmes, that lessons are learned and that there is a good basis for future years' work
- Investment in activities for school pupils and young people emerged from our research and engagement as a high priority, as they have been demonstrated to be able to offer good value and are supported by all Local Authority partners. This therefore forms the largest focus of our plan, noting that Transport Scotland's guidance suggests that capital measures outwith schools but which could encourage active travel to them should be included in the accessibility and inclusion theme; and similar with providing access to bikes for young people.
- The workplace theme forms a relatively modest component of our 2024/25 plan. This is because recent (post-covid) experience suggests to us and our partners that workplaces are less keen to engage in active travel promotion than they had been previously, so we are unable to ensure best value is delivered in those settings in the coming year. However, we are keen to retain the opportunity for some investment as we identify signs that employers may be becoming more enthusiastic, which will enable us to pilot focused measures with a small number of high trip volume workplaces (such as universities and NHS sites) that can be used to support a further development of work in future years



## SEStran People and Place Plan: summary

<b>Investment Proposal</b> (Project Name)	<b>Local Authority (and/or Delivery partner if applicable)</b>	<b>Total Investment (RDEL/CDEL)</b>	<b>Theme</b>
<p><b>Active Ways to School</b> This proposal will provide a programme of intensive support, delivered using embedded officers, for eight secondary schools and all of their associated feeder primary schools (a total of around 50 schools across the region). It will deliver tailored support packages depending on schools' needs and circumstances, and will include provision of bikes and associated equipment to pupils, improved cycle/scooter storage and signage/information, as well as walking/wheeling/cycling training (depending on needs and across a wide range of age groups), campaigns, challenges and events, and support with travel planning to encourage and enable pupils and other members of the schools' communities to travel actively more often.</p>	Third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£820000 RDEL £290000 CDEL	Schools and Young People
<p><b>Encouraging Active Travel: Young People</b> This proposal will support more young people to travel actively in settings apart from the school environments referenced above by delivering tailored support packages to nurseries, youth groups and schools which are outwith the eight clusters of the Active Journeys to School project. It will deliver tailored support packages for facilities which are likely to include provision of bikes and associated equipment for young people, improved cycle/scooter parking, as well as walking/wheeling/cycling training, campaigns, challenges and events.</p>	Local Authority	£424270 RDEL £121960 CDEL	Schools and Young People
<p><b>Access to Bikes: Young People</b> This proposal will enable continued delivery of the Access to Bikes for Young People Programme, to increase affordable access to bikes (including adaptive bikes) for young people who need a bike and wish to access one. Funding could support Local Authorities, schools, community groups and third sector organisations who work with young people. There will be a focus in this work package on provision of adapted bikes.</p>	Combination of local authority and third-party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£300000 CDEL	Accessibility and Inclusion

## SEStran People and Place Plan: summary

<b>Investment Proposal</b> (Project Name)	<b>Local Authority (and/or Delivery partner if applicable)</b>	<b>Total Investment (RDEL/CDEL)</b>	<b>Theme</b>
<p><b>Active Ways to Work: Large Employers</b> This proposal will deliver a pilot project to support the promotion of active travel to work now that employers in the region are starting to understand the post-Covid "new normal" travel patterns of their staff. It will support two large employers that currently have high rates of unsustainable travel to increase rates of walking and cycling. It will deliver tailored support packages which are likely to include provision of bikes and associated equipment to staff, improved cycle storage, changing areas/lockers and signage/information, as well as training, campaigns and events, and support with travel planning. Private sector employers may be asked to match fund the investment.</p>	Third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarded accordingly	£60000 RDEL £110000 CDEL	Workplaces
<p><b>Active Ways to Work: Other Employers</b> This proposal will improve facilities for active travel at workplaces including cycle parking and changing areas, as well as funding for active travel campaigns, challenges, training and travel plan development to encourage and enable active travel. Private sector employers may be asked to match fund the investment. This proposal will also enable the continuation of schemes which accredit workplaces as supporting active travel use.</p>	Local Authority	£80610 RDEL £184840 CDEL	Workplaces
<p><b>Workplace Regional Active Travel Promotional Campaign/Challenge</b> This proposal will enable SEStran's existing comms and marketing resource to be used to more extensively promote the benefits to employers of supporting active travel to work through marketing activity and engagement with regional employers' networks. The proposal will include promotion of the opportunities of the Active Ways to Work proposal.</p>	Tbc (either direct delivery by SEStran or contract to be awarded to third party)	£30000 RDEL	Workplaces

## SEStran People and Place Plan: summary

<b>Investment Proposal</b> (Project Name)	<b>Local Authority (and/or Delivery partner if applicable)</b>	<b>Total Investment (RDEL/CDEL)</b>	<b>Theme</b>
<p><b>Street Audits and Enabling Facilities</b> This proposal will enable audits of areas with high pedestrian, wheeling and cycling potential, likely including town centres, shopping streets, and routes to schools, public transport hubs, leisure facilities and parks, including engagement with residents, pupils, cyclists, pedestrians to understand their concerns and priorities. It will also enable removal of barriers to active travel and installation of signage and small enabling interventions e.g. dropped kerbs, handrails and cycle parking, where these are identified by the audits. There will be a focus in this work package on aligning these measures to those being delivered elsewhere in the regional plan, to add further value and generate additional modal shift.</p>	Local Authority	£500000 CDEL	Accessibility and Inclusion
<p><b>Local Active Travel Community Delivery gaps study</b> This proposal will identify key locations for provision of local active travel delivery support with specific focus on access to existing infrastructure, travel behaviours and barriers to active travel. Analysis will be carried out of the most effective local delivery mechanisms to provide this.</p>	Direct delivery by SEStran	£30000 RDEL	Accessibility and Inclusion
<p><b>Active Travel Hubs</b> This proposal will provide two new active travel hubs, located in communities in which significant potential for increased active travel is identified and where there is an existing lack of provision of support. Each will deliver a tailored range of services for local people to encourage and enable walking, cycling and wheeling as modes of transportation including access to bikes and associated equipment, cycle training, events and challenges.</p>	Third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£100000 RDEL £210000 CDEL	Accessibility and Inclusion
<p><b>Existing Active Travel Communities support</b> This proposal will provide support to existing larger organisations with a track record of delivering effective active travel interventions in their local communities. This will specifically support these organisations to expand their support further. This could include setting up satellite locations to increase reach, 'consultancy style' support to other organisations to deliver their own interventions or add capacity, and shared learning/training opportunities.</p>	Third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£110000 RDEL £115000 CDEL	Accessibility and Inclusion

## SEStran People and Place Plan: summary

<b>Investment Proposal</b> (Project Name)	<b>Local Authority (and/or Delivery partner if applicable)</b>	<b>Total Investment (RDEL/CDEL)</b>	<b>Theme</b>
<p><b>Encouraging Active Travel: Communities</b> This proposal will deliver initiatives which address existing barriers that disproportionately affect people that are often excluded from walking, wheeling and/or cycling, making active travel options more accessible and enjoyable for everyone. Initiatives could include training and events for community groups, social prescribing, buddy schemes and access to bikes.</p>	Combination of local authority and third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£656,660 RDEL £200,000 CDEL	Accessibility and Inclusion
<p><b>Access to Bikes</b> This proposal will improve access to bikes, particularly for those people for whom cost is a barrier and that are not able to access provision through schools, workplaces or other community projects. It will include low cost access to bikes (including adaptive bikes for children/families and disabled people), cycle training and low-cost maintenance of bikes. There will be a focus in this work package on provision of adapted bikes.</p>	Combination of local authority and third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£300,000 CDEL	Accessibility and Inclusion
<p><b>Regional AT Comms Campaign</b> This proposal will enable SEStran's existing comms and marketing resource to expand the provision of campaign work to promote the benefits of active travel and the opportunities to walk, wheel and cycle at a regional level. Partnerships are likely to be sought with national organisation to ensure consistency of messaging with assets also made available for LAs.</p>	Direct delivery by SEStran	£100,000 RDEL	Accessibility and Inclusion
<p><b>Regional Bike Share</b> This proposal will enable a SEStran-led feasibility study into the opportunities, costs and risks of a public bike hire schemes across the region, and which models may work best in different locations, with a focus on delivery options in 25/26</p>	Direct delivery by SEStran (or consultant acting on behalf of SEStran)	£40,000 RDEL	Accessibility and Inclusion
<p><b>Behaviour Change Project Officers</b> This proposal will provide two FTE project officers to support behaviour change strategy development in two local authorities. Their work will support delivery of behaviour change from 25/26 onwards, but direct delivery will not be a focus of their roles.</p>	Third party orgs to be invited to apply to a grant funding pot and all applications assessed against set criteria and funding awarding accordingly	£120,000 RDEL	Capacity and Capability Building

## SEStran People and Place Plan: summary

<b>Investment Proposal</b> (Project Name)	<b>Local Authority (and/or Delivery partner if applicable)</b>	<b>Total Investment (RDEL/CDEL)</b>	<b>Theme</b>
<p><b>Plan Management for 2024/25</b> This proposal will provide the resource to enable strong and effective management of SEStran's People and Place plan for 2024/25, and will provide resource from existing SEStran officers and specialist external advisors as appropriate. This line includes 20% contingency.</p>	SEStran PM Costs	£120,000 RDEL	Capacity and Capability Building
<p><b>Plan Preparation for 2025/26 onwards</b> This proposal will provide the resource for the planning of SEStran's People and Place plan in future years and will provide resource from existing SEStran officers and specialist external advisors as appropriate. A key remit will be coordination with Local Authorities' projects and joint planning with delivery partners. Its aim will be to develop a 5-year plan for delivery going forward, so this budget line will be significantly less/non-existent in future years. This line includes 20% contingency.</p>	Direct delivery by SEStran	£120,000 RDEL	Capacity and Capability Building
<p><b>Capability and capacity building development</b> This proposal will provide support for the development of knowledge sharing and capacity building across the region and will be used to cover the costs incurred to enable community capacity to be developed.</p>	Direct delivery by SEStran	£58,660 RDEL	Capacity and Capability Building
<p><b>Plan Level Monitoring &amp; Evaluation</b> This proposal will support the overall monitoring and evaluation of SEStran's People and Place plan. The budget will be allocated to compiling project-by-project data, using this to inform future plans, plus the plan and regional wide monitoring that is required. The capital element of this will be used to add to the regional network of counters to support the evaluation of the regional plan.</p>	Combination of SEStran, local authority and consultant acting on behalf of SEStran	£112,000 RDEL £63,000 CDEL	Capacity and Capability Building
<p><b>Project Level Monitoring &amp; Evaluation</b> This proposal will enable robust monitoring and evaluation of SEStran's People and Place plan, recognising the importance of this element, especially for the 2024/25 transition year. The budget will be allocated to ensure robust monitoring and evaluation of the effectiveness of the projects which make up the plan.</p>	Tied to individual projects	£325,000 RDEL	Capacity and Capability Building

SEStran People and Place Plan: summary

Investment Proposal (Project Name)	Local Authority (and/or Delivery partner if applicable)	Total Investment (RDEL/CDEL)	Theme
<b>National Monitoring</b> This proposal will provide a contribution to the continuation of a national monitoring for active travel within the SEStran region.	Tbc pending further discussion (but likely Cycling Scotland)	£105,000 RDEL	Capacity and Capability Building
<b>Total</b>		<b>£3,412,200 RDEL</b> <b>£2,274,800 CDEL</b>	

## Expected benefits

SEStran's People and Place plan will:

- Deliver increases in walking, wheeling and cycling, by both enabling and encouraging people that don't make these choices to start to do so, and those that do so already to do more
- Raise awareness of the benefits of active travel to many other people, making them more likely to change in future
- Work in many of the region's communities, schools, and residential settings, plus build capacity and capability for further change

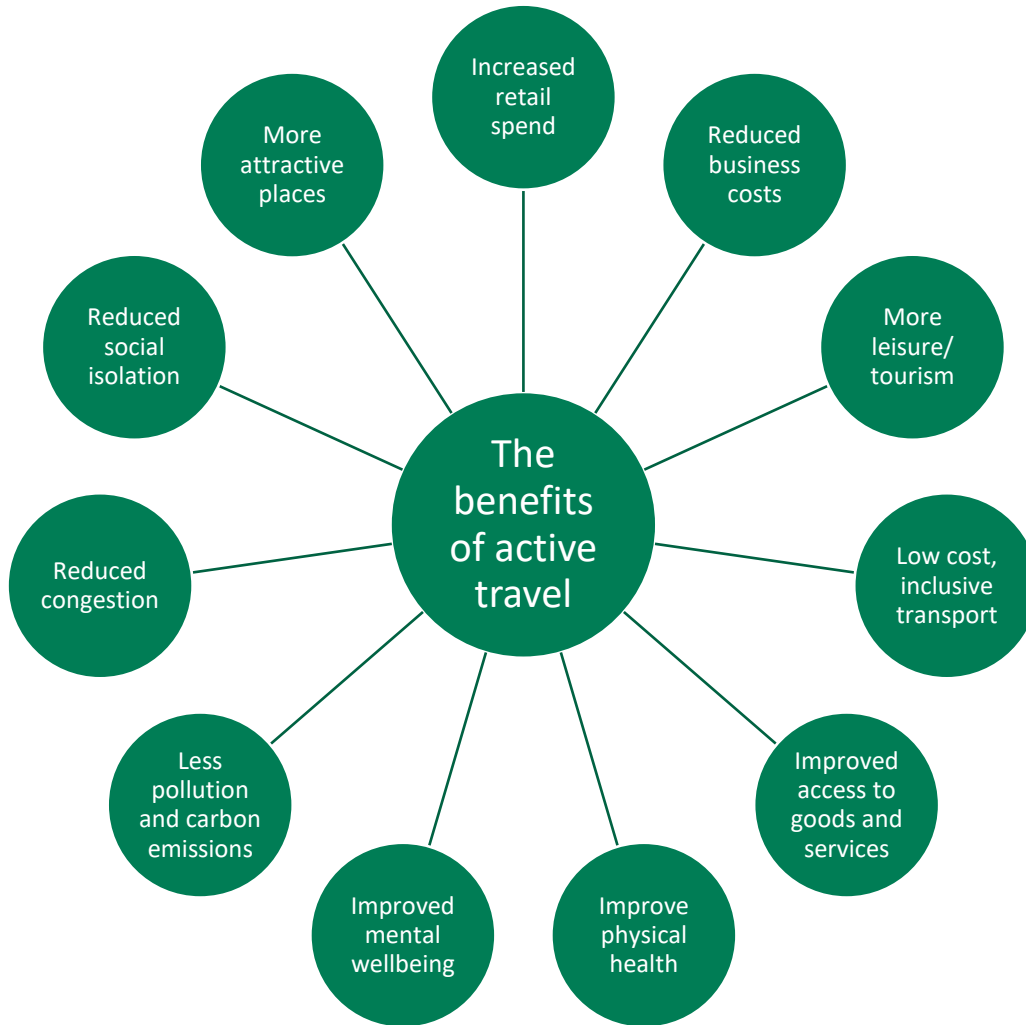
Its focus will be on active travel for utility journeys, though increased active travel for leisure may also be supported where this can be demonstrated to contribute to regional health and/or economic development objectives. It will promote use of both existing and newly completed infrastructure, and will seek increased use of active travel to connect to other sustainable transport modes as well as for end-to-end journeys.

SEStran and our Local Authority partners recognise that active travel provides huge benefits to the region's economy, public health, the environment and social inclusion. It is understood that high quality, attractive and accessible infrastructure is a prerequisite for people to walk, wheel and/or cycle, but that it is not sufficient to maximise the benefits for everyone .

The People and Place plan is therefore welcomed as an opportunity to enable and encourage more people to walk, wheel and cycle more often, which can contribute to many of the objectives of the Regional Transport Strategy:

- Strategy Objective 1: Transitioning to a sustainable, post-carbon transport system
  - Climate Change and Net Zero
  - Air Quality Transformed
  - Equitable Access to Transport
- Strategy Objective 2: Facilitating healthier travel options
  - Improved Physical & Mental Health and Activity
  - Increased Wellbeing
  - Transformed, Liveable Neighbourhoods
- Strategy Objective 3: Transforming public transport connectivity and access across the region
  - Greater Equality of Opportunity
  - Travel Barriers Removed
  - Reduced Social Isolation
- Strategy Objective 4: Supporting safe, sustainable and efficient movement of people and freight across the region
  - Reduced Road Casualties
  - A Just Transition in Inclusive Economic Growth
  - Improved Regional Competitiveness
  - Climate Change Adaptation

By enabling more people to walk, wheel and cycle more often, the People and Place plan will help realise many of the broad-ranging benefits of active travel to the region, as shown in the diagram.



The benefits will be delivered throughout the region, in our cities, towns large and small, villages and rural areas.

Robust monitoring and evaluation of interventions will be provided in order to assess the value of what has been provided and feedback into improved project design/delivery.

*Prepared by Jacobs on behalf of SEStran 20 February 2024.*



APPENDIX 2

Programme Name	Old Revenue	Old Capital	Old Cost	New Revenue	New Capital	New Cost	Revenue Variance	Capital Variance	Total Variance
Active Ways to School	£820,000	£290,000	£1,110,000	£495,670	£250,000	£745,670	-£324,330	-£40,000	-£364,330
Encouraging Active Travel: Young People	£424,270	£121,960	£546,230	£264,017	£300,000	£564,017	-£160,253	£178,040	£17,787
Access to Bikes: Young People		£300,000	£300,000	£0	£635,074	£635,074	£0	£335,074	£335,074
Active Ways to Work: Large Employers	£60,000	£110,000	£170,000	£30,000	£80,000	£110,000	-£30,000	-£30,000	-£60,000
Active Ways to Work: Other Employers	£80,610	£64,840	£145,450	£53,199	£93,281	£146,480	-£27,411	£28,441	£1,030
Workplace Regional Active Travel Promotional Campaign/Challenge	£30,000		£30,000	£0	£0	£0	-£30,000	£0	-£30,000
Street Audits and Enabling Facilities		£500,000	£500,000	£0	£700,000	£700,000	£0	£200,000	£200,000
Local Active Travel Delivery gaps study	£30,000		£30,000	£0	£0	£0	-£30,000	£0	-£30,000
Active Travel Hubs	£100,000	£210,000	£310,000	£0	£150,000	£150,000	-£100,000	-£60,000	-£160,000
Existing Active Travel Hubs Communities support	£110,000	£115,000	£225,000	£117,700	£184,762	£302,462	£7,700	£69,762	£77,462
Encouraging Active Travel: Communities	£656,660	£200,000	£856,660	£443,368	£387,728	£831,095	-£213,292	£187,728	-£25,565
Access to Bikes		£300,000	£300,000	£0	£531,355	£531,355	£0	£231,355	£231,355
Regional AT Comms Campaign	£100,000		£100,000	£50,000	£0	£50,000	-£50,000	£0	-£50,000
Regional Bike Share	£40,000		£40,000	£0	£0	£0	-£40,000	£0	-£40,000
Behaviour Change Project Officers	£120,000		£120,000	£120,000	£0	£120,000	£0	£0	£0
Programme Management for 2024/25	£120,000		£120,000	£100,000		£100,000	-£20,000	£0	-£20,000
Programme Preparation for 2025/26 onwards	£120,000		£120,000	£80,000	£0	£80,000	-£40,000	£0	-£40,000
Capability and capacity building development	£58,660		£58,660	£15,000	£0	£15,000	-£43,660	£0	-£43,660
Programme level Monitoring & evaluation	£112,000	£63,000	£175,000	£40,000	£100,000	£140,000	-£72,000	£37,000	-£35,000
Project level Monitoring & evaluation	£325,000		£325,000	£0	£0	£0	-£325,000	£0	-£325,000
National Monitoring	£105,000		£105,000	£105,000	£0	£105,000	£0	£0	£0
	<b>£3,412,200</b>	<b>£2,274,800</b>	<b>£5,687,000</b>	<b>£1,913,954</b>	<b>£3,412,200</b>	<b>£5,326,154</b>	<b>-£1,498,246</b>	<b>£1,137,400</b>	<b>-£360,846</b>

# SEStran People and Place Plan Grant Fund – Eligibility Criteria and Assessment Process

## Purpose of the Fund

In line with the [Regional Transport Strategy 2035](#), the SEStran People and Places Grant Fund is a key part of the regional delivery of active travel behaviour change in South East Scotland under SEStran's People and Place Plan. The overall plan is designed to deliver behaviour change interventions to support people in the region to choose active travel over private vehicles for utility journeys. The plan will:

- Deliver increases in walking, wheeling and cycling, by both enabling and encouraging people that don't make these choices to start to do so, and for those that do so already to do more
- Raise awareness of the benefits of active travel to many other people, making them more likely to change in future
- Work in many of the region's communities, schools, and residential settings, plus build capacity and capability for further change

## Project Eligibility

As part of SEStran's People and Place Plan, a list of programmes has been developed for which grant funding is available for projects that support delivery of these. To ensure that SEStran's retains a strategic role regionally, there will a minimum grant per organisation of £50,000 to ensure projects are of a sufficient scale to deliver regional impact.

## What is eligible for funding

Eligible projects must fit within one or more of the programmes identified as being open for third party delivery as identified in the wider Plan as follows:

Programme Name	Programme Description
Active Ways to School (walking, wheeling & cycling)	Projects under this programme will provide a programme of intensive support, delivered using embedded officers (assumed at 1 FTE per project), for a limited number of secondary schools and all of their associated feeder primary schools. It will deliver tailored support packages depending on schools' needs and circumstances, and will include provision of bikes and associated equipment to pupils, improved cycle/scooter storage and signage/information, as well as walking/wheeling/cycling training (depending on needs and across a wide range of age groups), campaigns, challenges and events, and support with travel planning to encourage and enable pupils and other members of the schools' communities to travel actively more often. They may also include measures to complement this cluster based model.
Active Ways to School (walking and wheeling)	The project under this programme will provide a programme of intensive support, delivered using embedded officers (assumed at 1 FTE per project), for a limited number of secondary school and all of their associated feeder primary schools. It will deliver tailored support packages depending on schools' needs and circumstances, with a specific focus on encouraging walking and wheeling to compliment Bikeability training, and could include campaigns, challenges and events, and support with travel planning to encourage and enable pupils and other members of the schools' communities to travel actively more often. They may also include measures to complement this cluster based model.
Access to Bikes: Young People	Projects under this programme will enable continued delivery of the Access to Bikes for Young People Programme, to increase affordable access to bikes for young people who need a bike and wish to access one. Funding could support community groups and third sector organisations who work with young people. There will be a focus in this work package on provision of adapted bikes.
Active Ways to Work: Large Employers	Projects under this programme will deliver a pilot projects to support the promotion of active travel to work now that employers in the region are starting to understand the post-Covid "new normal" travel patterns of their staff. They will support a limited number of large employers that currently have high rates of unsustainable travel to increase rates of walking, wheeling and cycling. It will deliver tailored support packages which are likely to include provision of bikes and associated equipment to staff, improved cycle storage, changing areas/lockers and signage/information, as well as training, campaigns and events, and support with travel planning.
Active Travel Hubs	Projects under this programme will provide a limited number of new active travel hubs, located in communities in which significant potential for increased active travel is identified and where there is an existing lack of provision of support. As a capital only programme, these hubs may be fixed locations that are unstaffed, but provide information and some services.

Existing Active Travel Communities support	Projects under this programme will provide support to existing larger organisations with existing active travel hubs and a track record of delivering effective active travel interventions in their local communities. This will specifically support these organisations to expand their support further. This could include setting up satellite locations to increase reach, 'consultancy style' support to other organisations to deliver their own interventions or add capacity, and shared learning/training opportunities.
Access to Bikes	Projects under this programme will enable continued delivery of the Access to Bikes Programme, to increase affordable access to bikes for people who need a bike and wish to access one. Funding could support community groups and third sector organisations who work with young people. There will be a focus in this work package on provision of adapted bikes.
Behaviour Change Project Officers	This proposal will provide 1 FTE project officers to support behaviour change strategy development in a limited number local authorities. Their work will support delivery of behaviour change from 25/26 onwards, but direct delivery will not be a focus of their roles.

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## 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 travel infrastructure
- Any project that does not focus on increasing rates of walking, wheeling and/or cycling

## 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. This conditionality applies to:

- all directly employed staff of the grant recipient
- any workers who are not directly employed but are directly engaged in delivering the grant-funded activity, whether they be sub-contractors or agency staff

### *Real Living Wage*

- In general, a grant recipient must demonstrate it is paying the Real Living Wage before it can access a grant
- All directly employed staff of the grant recipient must be paid at least the rLW and any workers who are not [directly employed but are directly engaged in delivering the grant-funded activity](#), whether they be sub-contractors or agency staff, must also be paid at least the rLW (including Apprentices)

Evidence required will depend on the size of the grant as per [Scottish Government guidance](#).

### *Effective workers' voice*

- All organisations with a workforce must be able to demonstrate before they can access a grant that all workers employed within that organisation have an effective voice
- voice exists at both collective and individual levels and organisations will be expected to show how genuine and effective voice is evidenced

The collective element of voice does not have to be evidenced by organisations with fewer than 21 workers. Examples of the types of evidence you can provide are found in the [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 a minimum of 2 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 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 4 members of staff from SEStran (not including those who have marked the applications) and be chaired by the Partnership Director. The quorum for this Panel shall be 3 members.

### Organisation Financial Assessment

Alongside the assessment, a financial sustainability assessment will be undertaken on organisations in line with City of Edinburgh Council's processes.

## Scoring Criteria

The scoring criteria that has been developed has been designed to assess projects on their overall quality, fit within the regional plan, experience of the organising delivering them, and value for money. A total score will be give out to 100 in line with the following criteria.

### *Organisation Experience*

This section will score the evidence that has been provided on an organisations previous success at delivering active travel behaviour change projects. The following scores will be assigned:

0	No experience provided, or experience is not relevant to active travel behaviour change
3	Relevant experience of active travel delivery shown, but lack of evidence of outcomes provided
6	Relevant experience of active travel delivery shown, with limited evidence of outcomes provided which partially aligns with the objectives of the People and Place Plan
10	Relevant experience of active travel delivery shown, with evidence provided that shows success of this delivery in line with the objectives of the People and Place Plan

### *Project fit to eligibility criteria*

This section will be scored based on the project summary and objectives provided, to ensure that they align with the specific programme. Note that a score of 0 in this section will result in an ineligible application, and no further scoring will be undertaken. The following scores will be assigned:

0	Project does not align with the programme's eligibility criteria
3	Project shows some alignment with the programme's eligibility criteria, but will require changes to make it fully eligible
10	Project fully aligns with the programme's eligibility criteria

### Value for Money

This section will be assessed based on the project budget provided, along with the project objective and outcomes. Consideration will also be taken of the overall plan budget, the affordability for specific programmes within that, and the comparative costs of other proposals (including costs of projects delivered in 2023/24). The following scores will be assigned:

0	Project cost is disproportionately high or low respective to the objectives and outcomes and the overall programme budget
10	Project cost is disproportionately high or low respective to the objectives and outcomes, but fits within the overall programme budget. Programme budget and/or objectives and/or budget will need adjusted to demonstrate value for money.
20	Project cost is proportionate to the objectives and outcomes, but not the overall programme budget. Programme budget will need adjusted to fit within the programme.
30	Project cost is proportionate to the objectives and outcomes and the overall programme budget

### Project History

This section will be assessed based on the evidence provided for the previous success of an existing project and how this aligns with the national [Active Travel Framework](#). If the project has not been run in previous financial years, the score for the 'organisational experience' section will be used here again. The following scores will be assigned:

0	Project has run previously and no, or inadequate, evidence of previous success provided
3	Project has run previously and limited evidence of previous success provided
6	Project has run previously and some evidence of previous success provided
10	Project has run previously and good evidence of previous success provided

### Project location

This section will be assessed based on the project location that provided, and how this ties in with the existing active travel network in that location for the modes being targeted (for example, for a project focused on walking and wheeling, we will consider the local walking and wheeling network). This section will be scored as follows:

0	Project location proposed does not connect with an existing active travel network relevant to the mode(s) targeted
5	Project location proposed either: <ul style="list-style-type: none"><li>Partially ties into an existing active travel network relevant to the mode(s) targeted</li><li>Fully ties into an existing active travel network relevant to only some of the mode(s) targeted</li></ul>
10	Project location proposed fully ties into an existing active travel network for the mode(s) targeted; or the location is to be specified by SEStran/a local authority rather than the applicant

### Project objectives

This section will be assessed based on the objectives provided, and how these will support the overall plan. This section will be scored as follows:



0	Project objectives are basic, lack relevance to the project, and do not align with delivery of the relevant programme objectives
2	Project objectives do not align with delivery of the relevant programme objectives, irrespective of their quality
4	Project objectives show minimal alignment with delivery of the relevant programme objectives, irrespective of their quality
6	Project objectives show partial alignment with delivery of the relevant programme objectives, irrespective of their quality
8	Project objectives are clear and have some relevance to the project, and show clear alignment with delivery of the relevant programme objectives.
10	Project objectives are clear and are specific to the project, and show clear alignment with delivery of the relevant programme objectives.

### *Project outcomes*

This section will be assessed based on the outcomes provided, how these will support the overall plan, and how these will align with the national [Active Travel Framework](#). This section will be scored as follows:

0	Project outcomes are basic, lack relevance to the project, and do not align with delivery of the relevant programme outcomes and Active Travel Framework
4	Project outcomes do not align with delivery of the relevant programme objectives and Active Travel Framework, irrespective of their quality
8	Project outcomes show minimal alignment with delivery of the relevant programme objectives and Active Travel Framework, irrespective of their quality
12	Project outcomes show partial alignment with delivery of the relevant programme objectives and Active Travel Framework, irrespective of their quality
16	Project outcomes are clear and have some relevance to the project, and show clear alignment with delivery of the relevant programme objectives.
20	Project outcomes are clear and specific to the project, and show clear alignment with delivery of the relevant programme outcomes and Active Travel Framework