

## PROJECTS AND STRATEGY PERFORMANCE REPORT

### 1 INTRODUCTION

- 1.1 This report updates the Committee on the performance of the Partnership's strategy and project workstreams in Quarter 4 of 2025/26. An earlier version of this report was presented to the Project and Strategy Delivery Oversight Subgroup at its last meeting in April.

### 2 PROJECTS AND STRATEGY QUARTER 4 REPORT

- 2.1 Appendix 1 gives a breakdown of progress of each project within quarter 4, including against budget and milestones. A project risk register and issues log is also kept and reported to the Project and Strategy Delivery Oversight Subgroup.
- 2.2 Most projects are on course to utilise the full budget by the end of 2025/26. In addition to previously reported underspend, it is anticipated that final outturns will see a further underspend on around £35,000. The majority of this is in the Transport to Healthcare and Regional Bus Strategy projects, as well as smaller values across several other projects. The reasons for these underspends are consultancy and design costs coming in at less than budgeted for.
- 2.4 Some key project and strategy updates over the quarter include:
- 2.4.1 Officers have worked with consultancy Systra to develop an action plan for the Regional Bus Strategy, to be shared with authorities, operators and Transport Scotland, to confirm prioritisation and first actions to progress. More recently, the first SEStran Regional Bus Board was held to review this and agree which actions should be taken forward in 2026/27.
- 2.4.2 For Transport to Health (TtH), the draft Case for Change report has been completed and reviewed. This has involved gathering and incorporating feedback internally and from Health Boards. The findings from the Case for Change were presented to the Learning Network in March. The Case for Change provides a strong overview on current challenges and opportunities in the region to help us develop an associated Strategy.
- 2.4.3
- The consultants working on SEStran project have largely completed all the technical analysis work associated with Stage One of the Strategic Business Case. This has included an in-depth analysis of the 2021 census data, and a review of future demand associated with economic growth developments. The Strategic Context Final Report was also completed, which will form a significant element of the Case for Investment report that will be completed at the end of Stage One. In addition to the technical work, the following tasks have been completed:
  - The Project Board has been established and the first meeting was held on 29<sup>th</sup> April.

- An application has been submitted to Transport Scotland for funding in 2026/27 towards the completion of the Strategic Business Case.

2.4.4 For work on freight, the SCOT-ZED project team has carried out 21 interviews with stakeholders in the region which will support second work package focusing on understanding the current system. Following on from these interviews, the project team ran three workshops focused on co-designing future pathways. The workshops had a range of local authority contacts, operators, and other stakeholders with an awareness of the industry's requirements. The latter part of the workshop looked to map out solutions to support a more sustainable and diverse workforce for the HDV sector going forward. These findings, alongside the other work packages, will be analysed and disseminated by the researchers to develop recommendations for SEStran and other stakeholders to take forward. The project team presented the project at the All Energy Conference on 13th May in Glasgow alongside other SCOT-ZED projects. The project team also visited Edinburgh in May to finalise results and meet with industry stakeholders. Next steps for this project are currently being assessed, with the potential for further funding in 2026/27.

## 2.5 People and Place

- 2.5.1 The 2025/26 People and Place programme was delivered on time and on budget, with the full grant award drawn down from Transport Scotland and spent delivering impactful projects across the region. As in 2024/25, some limited carryover has been allowed for projects that align with the school term, allowing uninterrupted delivery for them until 30th June 2026. The full year evaluation report will be presented to the Board at its next meeting.
- 2.5.2 Several case studies have been prepared in the past few months, including written examples as well as three videos to showcase a small selection of the projects we have funded – these can be seen here: <https://sestran.gov.uk/casestudies/>. The key project progress under the 5 themes in quarter 4 (plus access to cycles and the community grant fund) has been as follows:
- 2.5.3 As part of our **access to cycles** programme, cycle storage schemes across most LAs are largely completed for workplaces, residential and school sites. Midlothian Council have cycle storage now installed in 4 community locations. The Cycle Access Fund run by Cycling UK continued, working with 11 new organisations to support repair and recycling organisations in Q4 and distributing the full allocation of grant awards across the region. Transition St Andrews community project delivery has enabled 381 bikes to be repaired, 141 bikes loaned at low cost, and clear increases in confidence and likelihood to cycle. Cargo bikes are now in practical use by University Estates teams and students, reducing reliance on vans, while joint work with Police Scotland has improved cycle safety awareness. In Clackmannanshire, 2 new adaptive bikes were purchased for use in community settings and 6 new bikes and accessories were purchased for employability client referrals.
- 2.5.4 With **schools and young people**, FEL and Linlithgow Community Development Trust delivered 6 bike maintenance sessions, a newly-established after-school bike

club (Bridgend), 7 Healthy Minds sessions, 6 independent travel skills sessions, 15 led rides and walks and 5 route planning sessions. The Bike Buddies programme continues to support young people; 10 bikes are out on loan within the community. FEL supported the delivery of over 300 sessions in Falkirk and Clackmannanshire school hubs, with over 2,500 pupils engaged with. Following the successful completion of delivery in Falkirk, the Bike Buddies programme has now begun in Clackmannanshire. Significant progress has also been made on practical skills and employability development. The Clackmannanshire Bike Repair Shop, hosted at Forth Valley College, is nearing launch, with pupils identified to run the service under FEL supervision. The I Bike project continues, with a total of 232 active travel activities delivered recording 3646 pupil engagements. In Edinburgh, Bike4ever training reached three secondary schools and additional support needs schools, supported by new bikes and helmets and a schools bike maintenance project supported the servicing of 900 bikes. In East Lothian, the Outdoor Education team have delivered the majority of the learn to ride sessions in primary schools, with an extension to continue this delivery to the end of the academic year. In the Scottish Borders, the RIDONKULOUS Behaviour Change Campaign in Hawick has expanded through community and school engagement, new events, and promotion of the Active Travel Network, including successful mass participation and parkrun-linked activity.

2.5.5 Under the **accessibility and inclusion** theme a wide range of projects have been progressed in Q4. In East Lothian, a package of dropped kerb improvements was completed, focused on wheelchair users around two key areas. Quote from a resident: "Thank you so much for these being done, it has made a huge difference to me, and now allows me to get to school, Tesco and the doctors in my wheelchair." City of Edinburgh Council continues to support social prescribing walks and these have been well attended. Midlothian Council delivered 3 x community active travel engagement sessions. In West Lothian, a 'Steps Together' Health Walk for the residents of Boghall took place, over 15 people attended with an age range of 5-70. These are now run monthly and attendance continues to grow. FEL has continued the delivery of a community e-bike library with growth across Q4. FEL have seen an increase in referrals from NHS rheumatology with interest in developing and continuing the project. Transition St Andrews supported community based bike repair and continued low cost community bike loans. They also delivered an active travel event attracting 450 attendees and updated and distributed 5000 smarter travel maps.

2.5.6 Under the **workplaces** theme, Clackmannanshire Council purchased 6 new bikes and accessories for employability client referrals. This cross-department initiative is in its 2nd year and is pivotal in allowing people to access interviews or accept employment. At the Bioquarter, support has continued for monthly Bike Doctor sessions, regular seasonal nature walks, and a car sharing review enabling staff to trial MobilityWays, resulting in new groups and members. Activity also included travel information drop ins, liaison with bus operators, attendance at site meetings on parking, completion of the 2026 Travel Plan, cycle skills and 1-2-1 training, a StoryMap hub, and a cycle hire feasibility study informing 2026/27 delivery. Forth Valley College achieved the Walking Scotland Walk at Work Award, recognising the College's ongoing commitment to promoting walking within the workplace.

Midlothian Council have continued to offer staff walks, have expanded the e-bike offer for staff, with e-bike lockers installed for travel between council sites.

- 2.5.7 Work around **capacity and capability** building has included the delivery of a Local Authority shared learning event in January. The events brought together local authorities to discuss potential areas of collaboration and forward planning for the 2026/27 programme. The behaviour change strategy officer has progressed work with West Lothian Council with a final report due by end of June. Additional meetings were carried out with Local Authorities to support them with the development of their 2026/27 project proposals, which were also reviewed internally. Recruitment process to increase internal capacity was started and will be finalised in April 2026. The team also attended and contributed to Local Authority active travel forums. Urban Foresight successfully carried out 1-1 meetings with a number of funded organisations to collect stories of change capturing lived experience of impact. This will be fully analysed and integrated into the Programme Evaluation report.
- 2.5.8 On **sustainable transport** projects, as part of Travel Know How NHS Fife and NHS Borders have set up a CalCommmuter platform to support the collection of travel planning data and 166 personalised commute plans have been issued at Fife College. ComoUK installed the pop-up hub in Haddington from January through to March. The hub provided the opportunity for engagement, surveys and community outreach alongside active travel activities with local partners such as CyclingUK, Ageing Well East Lothian and Haddington Bikes. Also in East Lothian, Journey Hub placemaking improvements have been agreed and delivered covering multiple sites. CEC continued their promotional work with Enterprise Car Club with membership expected to grow. In Fife, promotion has continued of DRT bus services, including two bus wraps in west Fife. Penicuik Precinct and Glencorse Centre modal hubs were installed throughout March. Also in Midlothian, new home packs with bus day passes, maps and active travel information have been prepared for distribution.
- 2.5.9 The 15 funded **community projects** are delivering a range of activities across the region, with a good mix of support for walking and cycling initiatives. LCDT continued community engagement through school partnerships and off site cycling activities. Cycle Kitchen sessions were delivered, alongside targeted maintenance training for young people. At Bikes for Refugees 69 bikes were refurbished and distributed and 34 bike fixing sessions were delivered. North Edinburgh Arts increased their delivery of led rides and have delivered a range of training courses for walking and cycling activities to increase capacity and widen their offer. CLEAR Buckhaven has delivered 'Work-It' placements, providing training opportunities for Levenmouth Academy pupils who are struggling in a mainstream educational environment. The bike workshop proved a good learning environment for them to develop skills and confidence. Shrub delivered bike diy workshops, sessions for underrepresented groups and supported wheelchair repairs. At Porty Community Energy, the bike library had a strong year of delivery, with 440 hires and 1100 user days. Equal Footing continued access audits and drop kerb mapping, and new adapted cycles were commissioned. Parents for Future Scotland had educational packs completed by seven schools and supported the trial of several walking and

cycling buses. Bridgend Farmhouse have strengthened their skills development programme by introducing a four level structured placement model for young people in the Bike Barn, improving learning outcomes and progression.

- 2.5.10 Planning to 2026/27 People and Place has been complicated by a late reduction in the revenue funding element of the programme by 60%, or about £1.3million. As this is still be worked through at the time of writing this paper, a verbal update on progress will be provided later on this agenda.

### **3 COMMUNICATIONS AND MARKETING UPDATE**

3.1 Communications and marketing achievements include:

- A four-week digital ad campaign promoting Thistle Assistance cards – leading to almost 600 new app downloads.
- Completing the print and distribution procurement process for Thistle Assistance for the next three years.
- Following procurement, working with a film company to produce three more video case studies of projects we have funded through our People and Place programme.
- Entering and being shortlisted in two categories for the Scottish Transport Awards – Best Practice in Transport Planning and Transport Planning Authority of the Year.
- Three monthly newsletters published
- Various blog posts and factsheets produced
- People and Place newsletter published
- Regular posts on LinkedIn, leading to increased engagement and followers.

### **4 RECOMMENDATIONS**

4.1 The Committee is asked to note the contents of this report

Michael Melton

**Programme Manager**

5<sup>th</sup> June 2026

**Appendix 1: 2025/26 Q4 Projects and Strategy 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.

Budget	Income	Expenditure	SEStran Spend
Original Budget	£70,500.00	£534,500.00	£464,000.00
Current Budget	£33,500.00	£307,483.43	£273,983.43
Current Actual	£0.00	£232,068.59	
Current Remaining	£33,500.00	£77,894.84	
Predicted Future Spend	£33,500.00	£40,379.47	
Predicted total spend	£33,500.00	£272,448.06	£238,948.06
Predicted Variance	£0.00	£35,035.37	£35,035.37

	Count	Current Exp Budget	% Exp Budget
Major Delay	0	£0	0.0%
Minor Delay	1	£56,921	18.5%
On Target	9	£215,063	69.9%
Underspend >£5k	2	£107,443	34.9%
Underspend <£5k	4	£125,040	40.7%
On Budget	8	£75,000	24.4%
Overspend <£5k	0	£0	0.0%
Overspend >£5k	0	£0	0.0%
<b>Total</b>	<b>14</b>	<b>£307,483</b>	

Projects Programme and Financial Summary

Project	Finance Status	Change Since Last Quarter	Programme Status	Change Since Last Quarter	Current Inc Budget	Current Inc Prediction	Current Inc Variance	Current Exp Budget	Current Exp Prediction	Current Exp Remaining	Current Exp Variance
Multi Modal Interchanges	On Budget	↔	On Hold	↔	£0	£0	£0	£0	£0	£0	£0
Freight Strategy Delivery	On Budget	↔	On Target	↔	£0	£0	£0	£0	£0	£0	£0
Regional Cycle Network	On Budget	↔	On Target	↔	£0	£0	£0	£0	£0	£0	£0
RTPI & Ticketing	On Budget	↔	On Target	↔	£9,500	£9,500	£0	£19,500	£19,604	£-104	£-104
Regional Bus Strategy	Underspend >£5k	↓	Minor Delay	↔	£0	£0	£0	£56,921	£53,575	£25,252	£3,345
RTS Delivery Plan	On Budget	↔	On Hold	↔	£0	£0	£0	£22,000	£18,775	£6,225	£3,225
SEStran at Twenty	Underspend <£5k	↔	On Target	↔	£0	£0	£0	£40,000	£35,746	£4,254	£4,254
Rail Strategy	On Budget	↔	On Hold	↔	£0	£0	£0	£13,500	£13,500	£13,500	£0
Data Strategy	On Budget	↔	On Hold	↔	£0	£0	£0	£0	£0	£0	£0
Thistle Assistance	Underspend <£5k	↓	On Target	↔	£24,000	£24,000	£0	£62,531	£59,105	£3,588	£3,426
Transport to Health Strategy	Underspend >£5k	↓	On Target	↔	£0	£0	£0	£50,523	£36,240	£16,762	£14,282
Regional Bike Share	Underspend <£5k	↔	On Target	↔	£0	£0	£0	£12,509	£10,032	£4,288	£2,477
Sustainable Travel Awareness	Underspend <£5k	↔	On Target	↔	£0	£0	£0	£10,000	£6,599	£3,401	£3,401
Project Consultancy Support	On Budget	↔	On Target	↔	£0	£0	£0	£20,000	£19,272	£728	£728
<b>Total</b>					<b>£33,500</b>	<b>£33,500</b>	<b>£0</b>	<b>£307,483</b>	<b>£272,448</b>	<b>£77,895</b>	<b>£35,035</b>



















Project Name	<b>Thistle Assistance</b>
Current Exp Budget	£62,531
Project Code	92077
SEStran Lead	Sandra Lavergne
SEStran Manager	Michael Melton
Project Partners	All RTPs
Lead Partner	SEStran
Last Updated	31/03/2026

Finance Status
<b>Underspend &lt;£5k</b>
Programme Status
<b>On Target</b>

Budget	Income	Expenditure	SEStran Spend
Original Budget	£24,000.00	£32,000.00	£8,000.00
Current Budget	£24,000.00	£62,531.00	£38,531.00
Current Actual	£0.00	£58,943.49	
Current Remaining	£24,000.00	£3,587.51	
Predicted Future Spend	£24,000.00	£161.60	
Predicted total spend	£24,000.00	£59,105.09	£35,105.09
Predicted Variance	£0.00	£3,425.91	£3,425.91

37050	Milestone Status	Count	Percentage
42050	On Track	0	0%
£43,590.00	Delayed	2	10%
	Overdue	0	0%
42815	Complete	18	90%
61756	Source of Any Income: Other RTPs		
-£775.00			

**Project Summary**  
Thistle Assistance (card and app) is a national scheme that provides support to users that may face additional barriers to access public transport. It eases the communication between users and transport staff to make the experience more accessible and enjoyable.

RTS Actions	Project Objectives	Project Outcomes
Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network,	Increase distribution of the Thistle Assistance programme Raise awareness of the scheme nationally and locally Increase engagement with transport providers	Improve the journey experience in public transport for people with disabilities and mobility challenges. Improve feeling of safety for people with disability and mobility challenges when taking public transport. Contribute to making public transport seen as more accessible by people with disability and mobility challenges, Thistle Assistance embedded into transport providers' staff induction and training programme.

Q1 Project Progress and RAG status update	Q1 Objectives & RTS Actions Progress
The digital campaign delivered with Republic of Media ran for 6 weeks and was completed at the end of April 2025. The learning will help shape the next campaign, which is aimed to be delivered from September/October for 2 to 3 months, budget dependent. This campaign has been shortlisted as part of the National Transport Awards in the Campaign of the year category. Winners will be announced in October 2025. 5,000 cards / leaflets were ordered from current supplier to meet high demand during promotional campaign. All RTPs have been contacted to share highlights of 24/25. Meeting held with TS on 28/05/2025 to discuss progress to date. Printing and card distribution supplier appointed.	The digital campaign has been extremely successful and has contributed to increasing awareness of the scheme as well as increasing its uptake; it saw a total of 3,376 cards requested (up 2,477%) requested and 1,784 apps downloaded (up 5,147%). The project plan has been revised based on the lessons learned from the campaign and previous initiatives.

Q2 Project Progress and RAG status update	Q2 Objectives & RTS Actions Progress
Minor amendments have been made on the card request form based on Lessons learnt. Further development work is currently being undertaken to collect personal information from card requests and app. This will be finalised by the end of October, after which the next campaign will be taking place (from November). Privacy notice being updated. Procurement exercise started to appoint a media agency for future promotional campaigns. Progress on stakeholder engagement: met with TS and all the RTPs for progress update. Transport operators survey distributed.	Update of the privacy policy and amendment on the types of personal data collected in line with data policies will enable: - distribution of future surveys directed at existing users - collection of additional user data Collection and analysis of this information from both card and app usage, will lead to a better understanding of the current audience of the scheme, and potential gaps, as well as use and impact of the scheme in the overall passenger experience. Transport operators survey will provide a more robust baseline on current awareness and engagement with the scheme by the operators.

Q3 Project Progress and RAG status update	Q3 Objectives & RTS Actions Progress
The Thistle Assistance digital campaign was Highly Commended as part of the National Transport Awards 2025. New dashboard and development works on the request a card / app to capture personal data of users were finalised early November. Procurement exercise has been carried out for a media agency (work will include TA campaigns). New digital campaign has been carried out for 4 weeks replicating previous successful campaign. A total of 1,171 cards have been requested. Uptake on transport operator survey remains low; identified opportunities to work with CPT to increase uptake, which will take place in Jan. Initial chat on card printing and distribution procurement done.	With the new 'Request a card' / App format allowing for collection of personal information, we will aim to distribute a follow-up survey in Q4, targeting existing users, to better understand usage of the scheme and potential impact on journey experience. This milestone has been pushed to Q4 to allow enough time for people to reflect on usage of the card/app. Results from the transport operator survey will help shape future engagement initiatives to ensure that the scheme is widely known and understood by operators. This is delayed due to a low uptake.

Q4 Project Progress and RAG status update	Q4 Objectives & RTS Actions Progress
Presentation delivered at a CPT Bus Executive meeting in January which has resulted in positive engagement with both Lothian Buses and First Bus. A significant issue related to the app not being available on Google store has now been resolved. Additional budget available to deliver another digital campaign, focusing on the app instead of card uptake. The campaign ran for 4 weeks (between mid Feb to mid March 2026). Procurement exercise finalised for the distribution and printing of cards for 3 years - contract to start in April 2026. Held RTP meeting providing updates and budget information.	A high level plan for 26/27 has been developed and includes a key element on the evaluation of the scheme for Q1 and Q2 - exact scope still to be discussed. It was decided to remove the delivery of the user survey for 25/26 and the transport operator survey, to include this in the Evaluation work for 26/27. This will help us identify if and how the scheme meets our objectives, as well as identify any areas for improvement.

Milestones					
Name	Due Date	Revised Date	Completed Date	Status	Last Updated
App quarterly maintenance Q1	30/06/25		05/05/25	Complete	05/05/25
Printing brief circulated to 3 potential suppliers	01/06/25		08/05/25	Complete	08/05/25
Printing supplier appointed	30/06/25		09/06/25	Complete	09/06/25
Provide key updates to the Board	20/06/25		20/06/25	Complete	20/06/25
POD laying out plans for 25/26 approved and signed off	30/09/25		01/08/25	Complete	01/08/25
First RTP Thistle Assistance meeting	30/09/25		01/09/25	Complete	01/09/25
Update privacy policy prior to any new marketing initiative	30/09/25		30/09/25	Complete	30/09/25
App quarterly maintenance Q2	30/09/25		03/07/25	Complete	30/07/25
Update card request form prior to any new marketing initiative	30/09/25	10/11/25	10/11/25	Complete	10/11/25
Plan next digital marketing campaign	30/09/25	31/10/25	30/10/25	Complete	30/10/25
Transport operator survey created and distributed	30/09/25		25/09/25	Complete	25/09/25
App quarterly maintenance Q3	19/12/25		01/10/25	Complete	30/10/25
Results from transport operator survey collected and analysed	19/12/25	31/03/26	31/03/26	Complete	31/03/26
Digital marketing campaign done	19/12/25		12/12/25	Complete	19/12/25
User survey created and distributed	19/12/25	30/09/26		Delayed	31/03/26
Procurement exercise started to appoint a printer/distributor on a multi-year contract	19/12/25		19/12/25	Complete	19/12/25
App quarterly maintenance Q4	31/03/26		05/01/26	Complete	05/01/26
User survey analysed	31/03/26	30/10/26		Delayed	31/03/26
High level project plan for 26/27 based on all data collected and recommendations	31/03/26		28/02/26	Complete	28/02/26
Procurement exercise finalised with a supplier appointed	31/03/26		25/03/26	Complete	25/03/26



