



**INTERVENTION DETAILS**

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INTERVENTION NAME: .....

SHORT DESCRIPTION OF INTERVENTION:

<p><b>MODE(S):</b></p> <p><b>DESCRIPTION:</b></p>    <p><b>PROBLEMS ADDRESSED:</b></p>
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LEAD PROMOTER: .....

SUPPORT PROMOTER(S): .....

CONTACT OFFICER: .....

CONTACT DETAILS:

Tel: ..... E-mail: ..... Fax: .....

Address:.....



**INTERVENTION STATUS**

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**AT WHAT LEVEL OF DEVELOPMENT IS THE INTERVENTION?**

**Guidance:** Identifying the status of an intervention is an important input into the prioritisation framework. Annex I sets out the various stages in the development of a scheme/intervention prior to implementation. These vary according to the organisation developing the proposal. Please study Annex I carefully and decide which of the five stages most accurately describes where the intervention you are dealing with fits.

**OVERALL INTERVENTION STATUS: (select one)**

Classification of intervention Status - Range of Options		Tick
1	Proposed for investigation	
2	Under investigation	
3	Further appraisal work needed	
4	Scheme within the Programme	
5	Committed, Fully Funded	

(ANTICIPATED) START DATE: .....

(ANTICIPATED) COMPLETION DATE: .....

**INTERVENTION COST**

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FIGURE	PRELIM COSTS ONLY				TOTAL
	2006-2011	2011-2016	2016-2021	2021-2026	
GROSS (incl. third party contributions)					
NET (excl. third party contributions)					

SOURCE OF COST INFORMATION: .....

DO THE COSTS INCLUDE THE TREASURY'S OPTIMISM BIAS? YES / NO  
 [Note: as defined in the HM Treasury Green Book 2003]

DELIVERY MECHANISM (select one): LTP / TPI / DEVELOPER / OTHER (.....)

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**BENEFIT COST RATIO (BCR)**

PLEASE FILL OUT THE FOLLOWING TABLE. SPECIFY THE BCR FIGURE AND COMPLETE THE APPROPRIATE BOXES.

<b>BCR FIGURE:</b>					.....
<b>EVALUATION PERIOD:</b>					30 YEARS    60 YEARS    Other: .....
<b>METHODOLOGY USED:</b>					TUBA    COBA    Other: .....
<b>DISCOUNT RATE:</b>					3.0% / 3.5%    3.5%    6.0%    Other: .....
<b>SOURCE OF BCR INFORMATION:</b>					.....

**PRICE BASE USED (SPECIFY YEAR):** \_\_\_\_\_

**APPRAISAL SUMMARY TABLE**

Tick the box below if an **AST** is available.

<b>AST</b>

PLEASE **ATTACH** THE LATEST VERSION OF THE APPRAISAL SUMMARY TABLE WHERE THIS EXISTS.

**DOES THIS INTERVENTION HAVE SOUTH EAST PLAN REGIONAL / SUB-REGIONAL IMPLEMENTATION PLAN SUPPORT?**

**YES**  **NO**

\_\_\_\_\_



## **POLICY COMPATIBILITY QUESTIONNAIRE**

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The purpose of the policy compatibility questionnaire is to identify how each intervention contributes towards delivering the objectives of the key regional strategies.

The majority of the questions have been developed in a way that requires a YES/NO response. For other questions, a response to one of a series of options is required. For many questions, guidance is provided that enables a scheme promoter to assess whether or not the intervention is contributing to delivery of the key regional strategies. It is important to note that while questions 18 and 19 are not scored. Maps T1 and T2 are attached in Annex 2.

Where possible each response should be based on the outputs of quantitative assessment that is undertaken as part of the scheme justification. In the absence of quantitative information a qualitative assessment can be acceptable; however the Assembly may seek further clarification and/or additional information at a later stage in the process where this is necessary.

**In order to justify a “YES” response there must be a demonstrable linkage between the intervention and the question. In all other situations a “NO” response should be given to the question.**

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### **SECTION 1: QUESTIONS WHOSE ANSWERS ARE SCORED WITHIN THE PRIORITISATION METHODOLOGY**

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**Q1:** Does the intervention enable planned housing development?

**PLEASE TICK THE RELEVANT BOX:**

- = Less than 500 dwellings
- = 500 to 1000 dwellings
- = 1000 to 2500 dwellings
- = 2500 or more dwellings

**If yes,** briefly provide further information:



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**Q2:** Does the intervention support the creation of and/or access to significant employment opportunities?

**PLEASE TICK THE RELEVANT BOX:**

- = Less than 10000m<sup>2</sup>  
 = 10000m<sup>2</sup>+  
 = 15000m<sup>2</sup>+  
 = 20000m<sup>2</sup>+

**If yes,** briefly provide further information:

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**Q3:** Does the intervention improve accessibility for individuals to health and education services?

**PLEASE TICK THE RELEVANT BOX:**

- = No  
 = Yes - either education or health services  
 = Yes - both education and health services

**Guidance on assessing improvements to access to Health services:**

Improvement in accessibility to be measured as a) % increase in the number of households without access to a car within 30 and 60 minutes of a hospital by public transport, and b) % increase in the number of households without access to a car within 15 and 30 minutes of a GP by public transport (DfT Guidance on Accessibility Planning). For HA and NETWORK RAIL promoted schemes qualitative assessments are acceptable but where a scheme is jointly promoted with an LTA the LTA should provide the data referred to above.

**Guidance on assessing improvements to access to Education services:**

Improvement in accessibility to be measured as a) % increase in 16-19 year olds within 30 and 60 minutes of a Further Education Establishment by public transport (DfT Guidance on Accessibility Planning). For HA and NETWORK RAIL promoted schemes qualitative assessments are acceptable but where a scheme is jointly promoted with an LTA the LTA should provide the data referred to above.

**If yes,** briefly provide further information:



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**Q4:** Does the intervention improve accessibility for companies to the market?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

This question to be answered yes if freight-related movements are made easier if the scheme is implemented. Quantitative analysis must be included where available.

**If yes, briefly provide further information:**

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**Q5:** Does the intervention support ways of increasing access to goods and/or services that do not increase car-dependency?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Provide a qualitative description of how the intervention achieves this – examples include interventions that manage the use of an existing transport network, interventions that deliver improved travel information services, interventions that use communications technology to improve overall levels of access.

**If yes, briefly provide further information:**

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**Q6:** Does the intervention contribute to reducing the overall need to travel?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Where possible, provide a quantitative assessment of the reduction in the amount of travel and/or a reduction in the average trip length, or a qualitative assessment for interventions in the early stages of development.

**If yes, briefly provide justification and/or further information:**



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**Q7:** Does the intervention support an improvement in air quality within a declared Air Quality Management Area?

**ANSWER YES or NOT APPLICABLE:** \_\_\_\_\_

**Guidance:**

Must be an Air Quality Management Area identified in accordance with DEFRA guidance.

**If yes,** briefly provide further information:

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**Q8:** Does the intervention contribute to improving journey time reliability?

**PLEASE TICK THE RELEVANT BOX:**

- = No
- = The intervention improves journey time reliability on:
- The **Highways Agency motorway and trunk road network**; and / or
  - The **LTA principal road network**; and / or
  - Improves **reliability on a rail corridor**.

**Guidance:**

Quantitative assessment of improved reliability should be provided where possible:

- For **LTA interventions** reference should be made to Core Indicator LTP7 (percentage change in average vehicle delay in AM peak 0700-1000) where possible;
- For **Highways Agency** interventions reference should be made to the target that “the average vehicle delay on the slowest 10% of journeys is less in 2007/08 (or year of implementation) than the baseline period, where possible;
- For Network Rail interventions, that the intervention Improves **reliability on a rail corridor** (as measured by the Public Performance Measure) to above 88.9% (ORR TARGET SET FOR NETWORK RAIL 2008/09).

Otherwise a qualitative assessment acceptable, particularly for schemes in an earlier stage of development.

**If yes,** briefly provide further information:



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**Q9:** Does the intervention promote improved operation, and therefore best use of, the existing transport network?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Where a scheme will assist in making better use of the existing network (e.g. UTMC) and promotes more efficient use of network capacity, answer yes.

**If yes, briefly provide justification and/or further information:**

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**Q10:** Does the intervention address a strategic bottleneck within a regional hub (Map T1) or on a regional spoke (Map T1)?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance on definition of a Strategic Bottleneck**

A strategic bottleneck is a point of capacity constraint on the network which impedes the ability of road or rail traffic to pass that point without being subject to delay.

**If yes, briefly provide further information:**

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**Q11:** Does the intervention serve a hub identified in the South East Plan (Map T1)?

**ANSWER YES or NO:** \_\_\_\_\_

**If yes, briefly provide justification and/or further information:**



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**Q12:** Does the intervention serve a spoke identified in the South East Plan (Map T1)?

**ANSWER YES or NO:** \_\_\_\_\_

**If yes, briefly provide justification and/or further information:**

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**Q13:** Does the intervention improve access to one or more international gateways identified in the South East Plan (Map T1)?

**ANSWER YES or NO:** \_\_\_\_\_

**If yes, briefly provide justification and/or further information:**

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**Q14:** Does the intervention improve access along an international or inter-regional corridor identified in the South East Plan (Map T2)?

**ANSWER YES or NO:** \_\_\_\_\_

**If yes, briefly provide justification and/or further information:**



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**Q15:** Does the intervention reduce, or prevent significant deterioration in, the condition of the existing transport system?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Provide quantitative information on remaining residual life with and without the intervention, provide this to indicate extension to residual life.

Reference should be made to Best Value Indicator BV223 (Principal Roads) for LTAs, the "Maintain Individual Asset Index" for the Highways Agency and the Asset Stewardship Index for Network Rail.

**If yes,** briefly provide justification and/or further information:

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**Q16:** Does the intervention contribute to reducing the level of natural resource consumption?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Set out in qualitative (and where possible, quantitative) terms how this project helps to reduce consumption of natural resources.

**If yes,** briefly provide justification and/or further information:



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**Q17:** Does the intervention improve overall levels of safety on the transport network?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

Show predicted change in casualty rates for the whole population and for child casualties (broken down into Killed/Seriously Injured and Other)

**If yes,** briefly provide justification and/or further information:



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## SECTION 2: NON-SCORED QUESTIONS

**QUESTIONS 18 AND 19 ARE NOT SCORED WITHIN THE PRIORITISATION METHODOLOGY TOOL. HOWEVER, THE ACCOMPANYING INFORMATION BOXES MUST BE COMPLETED.**

**RELEVANT INFORMATION PROVIDED WILL BE DRAWN TO THE ATTENTION OF DECISION MAKERS THROUGH REFERENCE WITHIN THE COVERING REPORT TO THE SCHEME RANKING SHEET.**

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**Q18:** Is this scheme / intervention needed because it is part of a series of related schemes / interventions needed to deal with a corridor or area-wide problem in its totality?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

A proposal is considered “directly linked” to other transport schemes where non-implementation of this scheme would mean that another scheme, if implemented in isolation, could not in totality address an identified corridor or area-wide problem. Details to be provided in the box below.

**Why is the scheme linked? (Detail and justify all linkages)**



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**Q19:** Does the intervention address specifically a “single issue”?

**ANSWER YES or NO:** \_\_\_\_\_

**Guidance:**

If the proposal addresses a single issue please provide an explanation of the problem being addressed (e.g. for a safety related proposal please provide quantitative evidence of the problem).

**What is the specific single issue being addressed? For safety schemes please include accident analysis justification.**

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**ANNEX I**

<b>REGIONAL ASSEMBLY</b>		<b>Department for Transport</b>	<b>Local Transport Authorities</b>	<b>Highways Agency</b>	<b>Strategic Rail Authority</b>	<b>Network Rail</b>
<b>PRIORITISATION METHODOLOGY</b>		<b>Draft Guide to Developing Regional Transport Strategies (March 2005)</b>	<b>Draft Local Transport Major Scheme Guidance (April 2005)</b>	<b>Project Appraisal Report V3.3 (June 2004)</b>	<b>Appraisal Criteria Document (April 2003)</b>	<b>Guide to Railway Investment Projects (GRIP)</b>
<b>Proposed for investigation</b>	<b>Refers to</b>	Proposed for Investigation	Problems to be Addressed	Conception	Justification	Output Definition
<b>Under investigation</b>		Under Investigation	Assessment of Alternatives (Modes etc)	Feasibility: Pre Public Consultation	Options Considered	Pre Feasibility
<b>Further Appraisal Work</b>			Major Scheme Business Case (former Annex E)	Feasibility: Preferred Solution Decision	Preferred Solution and Business Case	Option Selection and Single Option Development
<b>Scheme within the Programme</b>		Scheme within the Programme	Programme Entry	Entry to TPI Programme	Detailed Design	Detailed Design
<b>Committed, Fully Funded</b>		Committed	Full Approval	Implementation: Commitment To Works Expenditure	Implementation	Construction, Testing and Commission / Scheme Handback

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ANNEX 2

