A947 Multi-Modal Corridor Study

Outline Business Case – Management Case

August 2024

Delivering a better world

Quality information

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1. The Management Case

1.1 Introduction and Objectives

A well-established project management, governance and assurance structure is key to the successful delivery of the A947 Multi-Modal Corridor Study. The Management Case seeks to provide assurance that the project is deliverable and commensurate with the level of information available at this stage, by examining the overarching resilience of project planning, governance structure, risk management, and the communications and stakeholder management approach. This seeks to inform a clear and shared understanding of the requirements and the measures needed, to manage the likely risks. The Management Case also sets out an initial outline plan for the project with regard to the realisation of benefits previously described in the Strategic and Socio-Economic Cases.

1.2 Evidence of Similar Projects

The following section provides an overview of the practical experience of Aberdeen City Council (ACC) in the delivery of infrastructure.

Aberdeen City Council General Fund Capital Programme (GFCP)

ACC's GFCP includes:

- Rolling Programmes: on-going rolling programme of capital investment to sustain the Council's existing asset base. This includes investment in buildings, roads, fleet and Information Communication and Technology (ICT);
- City Region Deal: ACC's funding commitment to the Aberdeen City Region Deal (£10m). It also includes those projects funded by the City Region Deal that the Council has been asked to lead on as they directly relate to investment in Council-owned infrastructure. The current 5-year total of this section of the GFCP is just under £30m. The key significant project within this section is delivery of the new External Transportation Link to the new Aberdeen South Harbour (being progressed by ACC as the local roads authority). This project is currently at the Outline Business Case (OBC) stage; and
- Fully Legally Committed Projects: projects progressed to tender and subsequent engagement of contractor. The current 5-year total of this section of the GFCP approved in March 2022 is just under £100m. Key recent projects include (but are not limited to) Union Terrace Gardens, Countesswells Primary School, Greyhope Primary School and Hub (now open), Tillydrone Primary School, B999 Shielhill Round Junction, South College Street Junction Project Phase 1 (discussed below under the Bus Partnership Fund), and Summerhill and Cloverhill new build housing.

Bus Partnership Fund (BPF)

Recent delivery experience includes the South College Street Junction Project Phase 1, funded by ACC and a grant from the Scottish Government's BPF[1]. In 2022, local company W M Donald were appointed as the main contractor for the project, which includes:

- An additional traffic lane along South College Street between Bank Street and Wellington Place;
- An additional lane on Palmerston Place;
- A new traffic signal controlled junction at the intersection of Palmerston Place/North Esplanade West;
- The alteration of the existing traffic signal-controlled junctions at the South College Street/Wellington Place junction and the South College Street/Millburn Street/Palmerston Place junction adding additional approach lanes and improving operational coordination;

[1] In January 2024 Transport Scotland announced that the BPF has been paused for the period post the 2023/24 financial year.

- New and altered walking and cycling infrastructure along South College Street and Palmerston Place;
- Reconfigured parking and loading areas on South College Street between Millburn Street and Riverside Drive.
- Capacity upgrades highlighted as essential prior to implementation of public realm and bus priority changes.
- The use of Compulsory Purchase was necessary to acquire land required to build the project. The order was confirmed by Scottish Ministers in December 2020. The Council made a General Vesting Declaration in February 2021, taking ownership of the land and rights in land required for the project on 8 April 2021.

The majority of the South College Street Junction Project Phase 1 works were completed by July 2023. The final section of the project providing a second left turn lane from Palmerston Place on to North Esplanade West became operational in Autumn 2023, following the completion of utility works. The project highlights ACC's practical experience dealing with a significant number of utility apparatus diversions, a number of which were on the work programme's critical path.

Figure 1-1: South College Street looking towards Wellington Place (January 2023)

Third Don Crossing (Diamond Bridge)

The project included the construction of 2.5km of roads either side of the River Don to facilitate the single-carriageway span between the Parkway / Whitestripes Road junction and the Tillydrone Avenue / St Machar Drive junctions, including the construction of the new bridge. The project also included the realignment and upgrade of roads to the south. The main feature of the project was the 90m span Third Don Crossing (Diamond Bridge), constructed using twin open box steel girders supporting a reinforced concrete deck. This crossing is designed to relieve congestion on two existing crossings within the city at A956 Bridge of Don and A90 Persley Bridge and facilitate further development north of the A90 Parkway. It was the first bridge built in Aberdeen in more than 30 years. Works on the £22.3m project commenced in August 2014 by contractor Balfour Beatty, with the crossing opening to traffic in June 2016.

Wider Project Management / Delivery Experience

ACC have practical planning, procurement and delivery experience for community-based infrastructure projects across their areas, with selected examples below:

- Brimmond School (ACC), opened 2015 (cost £12m): Built on the site of the former Newhills School in Bucksburn, Aberdeen, Brimmond School, covering 4,501sqm, was designed to accommodate the growing school-age population within the area. In addition to classroom and administration space, the project delivered a range of outdoor provision including a cycle track to

enable road safety lessons to take place within the school complex, courts for basketball and netball in addition to an all-weather sports pitch, an adventure playground, a sensory garden and a woodland wildlife area. The school can cater for 420 pupils and provides 80 nursery places, as well as accommodation for visual support services. The project was delivered using the hub model, in which Hub North Scotland was appointed development partner by ACC, with Ogilvie Construction selected as the main contractor for the build. JM Architects was tasked with creating the design for the school.

- Countesswells Primary School (ACC), opened April 2015, (cost £20.5m): This two-stream primary school, with early years provision, was completed with delivery partner Hub North Scotland. The Countesswells primary school caters for 434 pupils with an additional 60 early learning and child care places. It has an all-weather pitch and two playgrounds. Hub North Scotland appointed Morrison Construction as its design-and-build contractor. The architects were Halliday Fraser Munro. The construction programme commenced on 15 November 2021 and was opened on 25th April 2023.
- Greyhope Community Hub and Primary School (ACC, £28.1m): This community hub and two-stream primary school, with early years provision, was completed with delivery partner Hub North Scotland. It caters for 434 pupils with early learning and childcare facilities for another 100 pupils. There is a community café, a library, multi-purpose rooms, meeting spaces, recording facilities, performance and rehearsal facilities, a housing office and a 3G 7-a-side pitch along with outdoor play area and learning spaces. Hub North Scotland appointed Morrison Construction as its design-and-build contractor. The construction programme commenced on 25 April 2022 and the facility was opened in November 2023.

1.3 Governance, Organisational Structure and Roles

The following sections outline the governance, organisational structure, and key roles for the A947 Multi-Modal Corridor Study. Funding for the scheme has not yet been confirmed; however, the OBC will provide the basis for the scheme to be considered for future funding opportunities. Potential funding sources for implementation include Scottish Government's Active Travel Transformation Fund, the Nestrans capital budget and Aberdeen City Council internal funding. There may also be opportunities via Network Rail or ScotRail for the options that connect to Dyce railway station. There are however significant risks in realising these opportunities and it is likely that a combination of these funding sources would be required to fund a package of measures for the corridor.

1.3.1 Key Roles

The following table identifies the roles of key organisations in the delivery of the A947 Multi-Modal Corridor Study.

Table 1-1: Key Roles

Organisation	Role
ACC	Promoter for the business case / lead contracting entity for delivery of the package of measures.
Nestrans	Nestrans' focus is on the overall strategy for transport improvements in North East Scotland and managing delivery between the two local authority areas.

1.3.2 Governance

The scheme would be subject to a number of Boards / Committees for decision making, depending on the funding route taken. These are discussed in high-level form below. Depending on the funding source to be agreed, the governance arrangements would be tailored to the specific requirements of the funder.

Investment Decision Groups (IDGs)

The ACC Finance and Resources Committee acts as the primary decision maker for major investment decisions. It approves and monitors financial strategies, budgets and financial performance in light of available funding, including the development and delivery of the Council's capital programme – this will include the A947 Multi-Modal Corridor Study. Officers are required to seek approval on recommendations via this committee before progression to the next phase of work, unless otherwise agreed.

The Net Zero, Environment and Transport Committee monitors the delivery of all services and functions relating to net zero, the environment and transport and scrutinises performance and approves options within set budgets.

The Nestrans Board consists of eight elected Council members from Aberdeen City and Aberdeenshire Council as well as four non-Councillor board members and two professional advisors. The A947 Multi-Modal Corridor Study requires regular reporting to the Nestrans Board for information, prior to the project progressing to its next stage. The Nestrans Board meetings take place every two months.

Programme Management

The ACC Transportation Programmes Board (TPB) consists of key Council officers who have vested interests in Aberdeen's Transport Programme. This includes representatives from transport teams, finance, procurement, legal and Heads of Service. The TPB acts as the primary decision maker on change control processes for the A947 Multi-Modal Corridor Study. Changes to the scope, overall budget, milestones or significant spend profile changes are required to be approved by TPB before the change can be implemented, unless they are within tolerance. Significant spend profile changes are defined as those that affect the approved spend profile of a project across financial years. The TPB meetings take place monthly. Subject to scheme requirements a separate project board may be set up to manage the project, reporting to the TPB, however this has yet to be confirmed.

Project Management

The A947 Multi-Modal Corridor Study is managed by Tony Maric, who has the responsibility for the day-to-day management of the project development and reporting requirements in line with the relevant Boards set out above.

Consultancy Support

To date, ACC has commissioned consultancy support (AECOM) to design and develop a Scottish Transport Appraisal Guidance (STAG)-based appraisal of the options to satisfy this OBC, procured via Lot 2 – Scotland Excel Engineering and Technical Consultancy Services Framework. The Consultant reports to the ACC Project Management Team.

Responsibility Levels for Decision Making

Table 1-2 shows indicative decision making levels to guide the project, however the final arrangements will be dependent on the funding source. The magnitude of any change will be assessed, and the consequences referred to the appropriate level for decision where required. In all cases where there is doubt, reference will be made up the decision ladder.

Table 1-2: Levels of Responsibilities

Indicative level of responsibilities	Level at which decisions should be taken
Strategic decisions which represent a major risk to programme or budget (e.g. risk of major delay to the project for technical, financial or political reasons).	IDMs
Authority required to commit significant expenditure such as awarding of a construction contract.	IDMs
Award of preparation contracts/commissions, e.g. consultancy commissions, ground investigations.	Transportation Programme Board and equivalent if under procurement threshold (ACC). Demand Management Control Board & Director of Procurement (ACC) if above procurement threshold
Strategic management of programme and change within budgets agreed by IDMs.	Transportation Programme Board
Overall programme management within agreed budgets and timescales agreed by the Programme Management Board.	Programme Sponsor / Programme Manager
Day to day management of the A947 Multi-Modal Corridor Study. First line contact for partners. Guidance to and control of partners.	Senior Project Manager
Support to Senior Project Manager and day to day liaison with project partners.	Project Manager
Day to day administration of project including supervision of statutory procedures.	Project Manager

Table 1-3 presents an overview of the indicative project governance.

Table 1-3: Governance Overview Summary (As Applicable)

Board / Committee	Membership	Frequency	Liaison / Report to	Responsibilities
IDMs (Organisation Committees / Boards)				
ACC Finance and Resources Committee	▪ 9 Elected Council Members	▪ Five times per year		▪ Project strategic direction ▪ Scheme development progression decision point ▪ Procurement decision point – main contract award
Net Zero, Environment and Transport Committee	▪ 9 Elected Council Members	▪ Five times per year		
Nestrans Board	▪ Eight Elected Members from Aberdeen City and Aberdeenshire Councils; four non-Councillor board members; and two professional advisors.	▪ Every two months		
Programme Management				
ACC Transportation Programmes Board (TPB)	▪ Representatives from transport teams, finance, procurement, legal and Heads of Service.	▪ Monthly	▪ Relevant Committees ▪ Senior Management Teams	▪ Project development progression ▪ Programme and budget definition, planning, management and control ▪ Communications Strategy ▪ Policy Interface ▪ Risk Management
Project Management				
ACC - A947 Multi-Modal Corridor Study Project Management Team	▪ Senior Project Manager and Project Manager(s)	As required	▪ Senior Project Officer ▪ Statutory procedures ▪ Environmental procedures ▪ Traffic and assessment procedures ▪ Communications ▪ Legal ▪ Procurement	▪ Project Development between Approval Stages ▪ Project Delivery: planning and management ▪ Quality assurance ▪ Programme & Budget definition and compliance

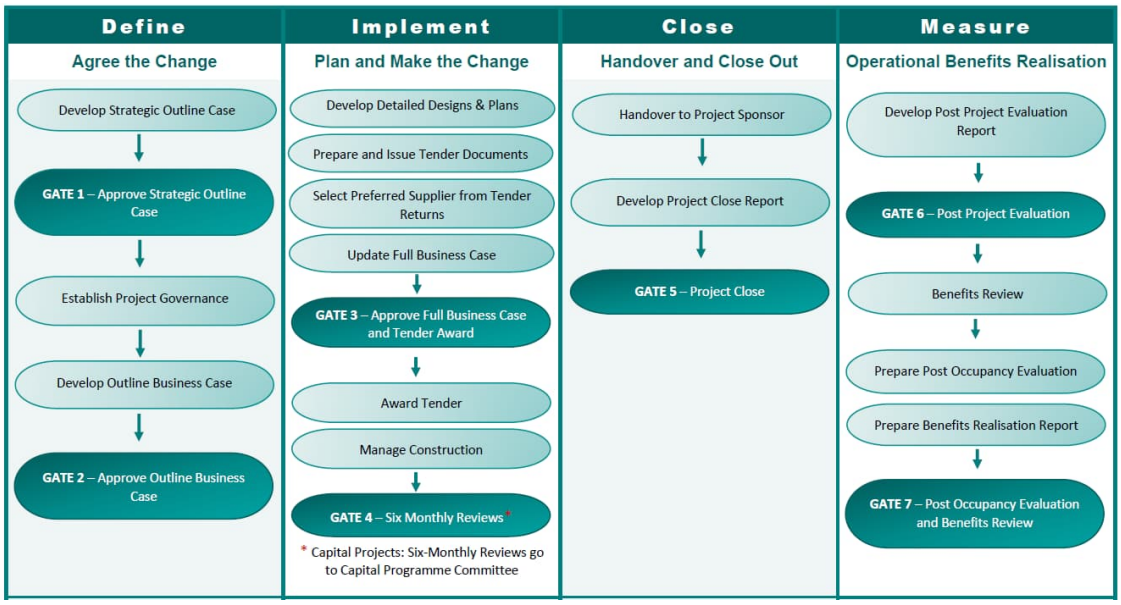
Board / Committee	Membership	Frequency	Liaison / Report to	Responsibilities
Consultancy Support				
STAG Detailed Options Appraisal / Development of the OBC	▪ AECOM (OBC)	▪ As required	▪ ACC Project Management Team	▪ Project delivery / development of the STAG and OBC technical outputs

1.4 Assurance

Local Assurance

Figure 1-2 provides an overview of ACC's project lifecycle approach. It highlights the key decision points / gateways where local assurance of the project will also be undertaken. The next check point is Gate 2 which will provide assurance of this OBC. The local assurance process notes whenever authorisation is sought to proceed to the next project phase, the local authority committee (as discussed in Section 1.3) will be presented with a full report with a summary of the outcomes of the completed work and recommendations for the next phase, with any supporting documentation such as technical notes, executive summaries, appraisals and completed gateway review recommendations appended to the report.

Figure 1-2: ACC Project Lifecycle Approach



An approvals plan is recommended to be produced and aligned with the project plan milestones at the next stage.

1.5 Project Reporting

Project reporting is essential to keep all key stakeholders fully informed of the project's progression, as well as highlighting any key issues, tasks and decision points. Project reporting requirements will depend on the project funding route, however regular reporting as part of the project assurance and governance framework will likely include:

- **Local project reporting:** In accordance with the governance requirements set out in Section 1.4, progress reporting is taken to the various Boards identified (as applicable). The ACC TPB will manage key progress reporting at Officer level within ACC. The ACC CGRC is responsible for reviewing the programme progress at each sitting of the Committee through Service Updates. The Chief Officer of Strategic Place Planning will present the report. The A947 Multi-Modal Corridor Study Project Manager(s) is responsible for submitting a Project Status Report (PSR) to the Senior Project Officer of ACC on a monthly basis.
- **Scheme funding contractual reporting:** Requirements will be met for reporting to funders.
- **Risk review and reporting:** assessment of risks and deliverability issues will continue to be reviewed and updated in collaboration with key stakeholders as the deliverables transition from OBC to Full Business Case (FBC). Risks will be reported via the various governance arrangements set out in this chapter to ensure that they are well understood by decision makers at all levels.

- **Monitoring and evaluation / benefit realisation reporting:** Requirements linked to these activities are set out in section 0 of this Management Case. At a high level, however, it is anticipated that reporting would take place at pre-determined intervals forecast for pre-infrastructure/new service introduction (to set the baseline), at 12 to 24 months after introduction, and 3-5 years after introduction. Timing of the assessment may vary by deliverable within the A947 Multi-Modal Corridor Study programme – dependent on the delivery strategy for the project.
- **Lessons learnt reporting:** Workshop reporting and a lessons management report are expected to be undertaken. This is set out in section 1.9 of this Management Case.

1.6 Project Plan

To inform the current OBC submission, a draft high-level programme has been developed to provide an indication of the likely further durations for development and the eventual construction / delivery phase for the project (Table 1-4). There is a requirement to develop this into a detailed project plan for each option as part of further design work following the submission of this OBC.

Table 1-4: Draft Programme Indicative

Milestone	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35
OBC											
FBC											
Design and Procurement											
Construction											
Post Project Evaluation											

1.7 Stakeholder Engagement and Communications

1.7.1 Key Stakeholders

Key stakeholders are set out in Section 2.14 of the Strategic Case, alongside their reason for involvement.

Pre-OBC Engagement

To support the identification of problems, issues, constraints and opportunities on the study corridor, initial consultations were undertaken in Autumn 2021 with stakeholders including Aberdeenshire Council, Nestrans, Aberdeen Cycle Forum, Aberdeen International Airport, First Aberdeen, Newmachar Community Council and Scottish Enterprise.

In Summer 2022, a second stage of consultation was held to provide opportunity for members of the public and stakeholders to provide feedback on the options developed following the first round of consultation. The consultation period lasted four weeks between 22nd July 2022 and 19th August 2022 and was conducted via a Virtual Consultation Room linked through the ACC website, a public drop-in event and online drop-in sessions.

OBC Engagement

A public consultation was held for four weeks between 17th May and 14th June 2024 to gain views and feedback on the options further developed for the A947 corridor at the Detailed Appraisal stage of the study. This included:

- An online consultation held through the Citizen Space page hosted on the ACC website. The page had information on the background to the study, work completed to date and an overview of

the key features of the option packages being consulted upon. GIS maps were used to present the location of each option within a package and allowed for representation of how the different options interact with one another. CAD drawings were also available for certain options;

- A public drop-in event was held at the Craighaar Hotel on Thursday 6th June 2024, which was attended by 14 people. This gave attendees opportunity to discuss options with the project team;
- Surveys (online and printed). An online survey was hosted on the ACC website, with printed versions also available for those attending the in-person drop-in event. Two versions of the survey were available depending if the respondent was a member of the public (this received a total of 54 responses) or responding on behalf of an organisation (this received a total of seven responses);
- Schools engagement (interactive session with pupils at Stoneywood Primary School on 8th May 2024);
- Consultation promotion (Social media posts, emails to stakeholders and community councils); and
- Briefings for Local Elected Members (ACC Councillors), MSPs and MPs to notify them about the consultation.

Feedback received through the consultation showed that there were mixed opinions on the overall transport strategy for the A947 corridor, with a contrast between members of the public and organisations. Opinions amongst members of the public were split, with 48% agreeing with the strategy and 44.3% disagreeing in total. In contrast, organisations overwhelmingly opposed the strategy with 71.4% stating that they strongly disagree. No organisations agreed with the strategy. It should be noted that the low sample size may have impacted these results and so this result should be treated with caution.

Feedback received contributed to determining the final package of measures put forward in this OBC. Further outcomes and feedback from engagement activities undertaken to support the OBC is reported in Section 2.14 of the Strategic Case.

Future Engagement

Future engagement will be critical to address responses to engagement undertaken to date, provide an update and opportunity for comment on evolving designs and address specific risks for the project such as acceptability to stakeholders (particularly businesses), statutory undertakings and consents.

Inclusivity and Equality

In accordance with s149(1) of the Equality Act 2010, in undertaking any future stakeholder engagement and communications, ACC will have regard for the need to:

- Eliminate unlawful discrimination, harassment and victimisation;
- Advance equality of opportunity between persons who share a relevant protected characteristic, and persons who do not share it; and
- Foster good relations between those who have a relevant protected characteristic and those who do not.

1.8 Risk and Issues Management

Management of risk is an integral part of ACC's programme and project management processes. Risk management is a methodical approach to identifying, quantifying and managing risks that occur during the lifecycle of a project. Risk management is about managing threats and opportunities to create an environment of 'No Surprises'. Key to effectively mitigating risks is to develop a series of well-defined steps to support better decision making through an in-depth comprehension of the potential risks inherent in a scheme and their likely impact.

The approach to risk management for the project is illustrated in Figure 1-3.

Figure 1-3: Risk Management Approach

ACC's risk management framework and guidance documents contain the processes and activities for identifying and assessing risks, planning and implementing controls and monitoring progress. This includes a Risk Appetite Statement which sets out the principles for how the Council will balance risk and opportunity in achieving its objectives. The Statement will be used to guide ACC's Scheme of Governance, providing guidance when decisions are made by Full Council, committees and sub-committees within their Terms of Reference, and officers under the Powers Delegated to Officers. This includes procurement and contractual decisions during delivery.

The draft objectives for the project with respect to the management of risk are summarised below:

- Promote a risk aware culture throughout the project team, which has at its heart the goal of delivering improved outcomes for the community. This includes embedding risk management as a fundamental principle within decision making; and ensuring that uncertainty and robust risk-based decision making is central to the lifecycle process to ensure the investment is financially viable.
- Provide a comprehensive understanding of key deliverability risks. This includes seeking to identify, assess and respond to all risks with the potential to undermine the achievement of the project objectives.
- Identify opportunities with the potential to maximise benefit and ensure that risk management techniques are applied to reduce / mitigate threat so that opportunities may be managed successfully.
- Identify risks to the project's benefits realisation, cost, schedule and output targets.

Key risks have been prepared for the project in response to the risk management approach and objectives and are summarised in

Table 1-5. At this stage, no quantitative cost risk register (QCRA) has been prepared, however it is recommended that this is developed at the FBC stage.

Risk identification will continue to be undertaken through the holding of risk workshops, meetings, risk interviews and questionnaires (as appropriate). All mitigation measures, once identified, are to be assigned a risk owner who will have responsibility for ensuring that the risk is managed and monitored over time and that the mitigation measures are undertaken to agreed timescales.

Table 1-5: Key Risks

Risk	Description	Mitigation
Stakeholder acceptability (intervention specific)	Public and stakeholder buy-in is needed to ensure support for all specific options identified to be implemented following the detailed appraisal and OBC. For instance, the removal of on-street parking bays and implementing one-way restrictions etc.	Stakeholder Engagement Plan will clearly set out the scope and aims of engagement activities to ensure engagement is meaningful thus avoiding fatigue. Multi-pronged engagement techniques to ensure the approach is as inclusive as possible.
Political Buy-In	Political buy-in is needed to ensure support for any options implemented following the detailed appraisal and OBC.	Member engagement in relation to further development and refinement of options as the scheme develops.
Funding Availability	The delivery of the OBC package is dependent on the availability of funding. Funding for the scheme has not yet been confirmed, which presents a risk to delivery. Specific risks relating to the potential funding opportunities include: • ATTF – as a nationally competitive fund, there is a risk that a funding bid would not be successful. • ACC / Nestrans – competing priorities / pressures on local budgets. • Network Rail / ScotRail – requirement for engagement and prioritisation of schemes within future pipelines.	Continued review of funding opportunities. Development of business case in line with technical requirements.
Scheme Costs	Increased scheme costs due to delays in scheme development, inflation assumptions and exchange rates (e.g. raw materials procured overseas).	Ongoing review of Cost Plans in advance of the FBC. Independent assurance of capital works costs. Appropriate contingency and risk for inflations in costings in the Financial Case. The preparation of a QCRA and quantitative schedule risk register (QSRA) (as appropriate) is recommended at the next development stage.
Market Conditions	Availability and capacity of contractors including lack of market interest / competition impacting timescales and/or costs.	Early market engagement and soft market testing.
Design	Design considerations inherent with all projects include uncertainty risks relating to, for example, topography, underground conditions, drainage issues, utilities and diversions. Further investigation of these aspects will be required for any options taken forward.	Early engagement with authorities. Design development.
Land	Due to minimal verge space adjacent to the carriageway along the eastern part of the link, Option AT58 would require third party land acquisition. A value for third party land has not yet been estimated or included in the scheme costs, which would influence the final outturn	Design development to mitigate requirement for land acquisition as far as reasonably possible. Production of a Land and Property Strategy to cover the necessary consents,

Risk	Description	Mitigation
	costs. There is also risk of legal and planning issues which could affect delivery.	approvals and acquisition of land to facilitate the works, either by negotiation or compulsory acquisition. Early engagement with landowners, in accordance with Land and Property Strategy. Land costs are accounted for within the risk and contingency allocation provision within the Financial Case.

1.9 Lessons Management

ACC have previous project delivery experience as set out in Section 1.2. This provides a good basis to leverage lessons learnt to enhance the delivery of the A947 Multi-Modal Corridor Study outcomes, as well as document and provide an evidence base for future schemes within their capital investment pipeline.

To date, ACC have sought to maximise lessons learnt through procurement of an experienced contractor via Lot 2 of the Scotland Excel Engineering and Technical Consultancy Services Framework to support the development of the OBC. The framework provides the Council with access to a range of contractors with proven skills, leadership and capacity aligned to key technical areas of focus for this business case, including but not limited to public transport, active travel (walking, wheeling and cycling etc.), freight and logistics, parking reviews, strategies, street engineering, STAG appraisals, traffic orders, road safety, traffic signals and management.

Next steps will include an initial review of previously recorded lessons learnt workshop reports (to be sourced by Project Managers from ACC's Lesson Learned Library), to make best use of existing project delivery experience. The ACC library records lessons according to:

- Type of project.
- Topic / Category of lesson.
- Project Stage.
- Success, Challenge, Recommendation.
- Impact on Project.
- Actions.

In addition, lessons learned will be reviewed with respect to wider ACC-led schemes (the A96 Inverurie to Aberdeen corridor study, the A944/A9119 Westhill to Aberdeen corridor study, the A90/A92 Aberdeen to Laurencekirk corridor study, the A92 Bridge of Don to Bridge of Dee corridor study, the Ellon Park & Ride to Garthdee corridor study and the A93 Peterculter to Aberdeen City Centre corridor study – and the continuing development of the business case for Aberdeen Rapid Transit (ART).

To ensure lessons are able to be meaningfully applied to future projects, lessons will be recorded in accordance with ACC's Lesson Learned Library standard practices. Particular focus will be given to capturing:

- Successes: covering areas of project management, engineering, commercial aspects and stakeholder management etc.
- Challenges / Recommendations: as per those areas covered under successes.
- Action: next steps to address lessons in the future stage of programme delivery.

At project closeout, a final review of lessons learned will be completed, enabling any operational risks to be transferred out of the project. A final lessons management report (as appropriate) is to be prepared and shared by ACC with partners. The value in such a report is anticipated to be a risk

section, detailing generic risks (both opportunities and threats) that might affect other similar programmes/projects in the future, together with responses that have been found to be effective.

1.10 Benefits Management and Evaluation

Monitoring and evaluation / benefit realisation activities will be central to ensuring the A947 Multi-Modal Corridor Study delivers as expected and has the intended impacts aligned to the objectives and investment logic map prepared. It will be vital to understand the effect that scheme has had, as this enables determination of whether desired impacts are met. The assessment will also consider how well it was implemented.

A proportionate and targeted approach to the assessment of benefits is proposed to demonstrate that the scheme has achieved is objectives and that the funding has been wisely invested.

Baseline Reporting

Given that the scheme is at a relatively early stage in terms of development, it is considered premature to be prescriptive in terms of the establishment of the collection and organisation of the data that will provide the baseline. It is anticipated that this will be developed and agreed with ACC, during the period immediately prior to completion / operation of the package.

It is likely that the baseline data may include, but will not necessarily be limited to:

- Data for walking and wheeling trips in the study area for 2024; and
- Data for cycling trips in the study area for 2024.

Building on the above general sources, based on the TPOs presented in the Strategic Case, a range of specific key performance targets, indicators and methods and frequency of reporting has also been identified. This will assist in supporting the evaluation of transport, local environment and safety impacts delivered as a result of the project. These are set out in the Measures for Success section of the Strategic Case and are focused on outcomes relating to sustainable modal shift to walking, wheeling and cycling. The indicators will assist in reporting against the short-, medium- and long-term outcomes identified in the investment logic map for the project.

It will be important to establish through discussions with other organisations what information is available as part of their regular data gathering functions at that time, to avoid incurring additional cost and to limit the collection of new information to that which is strictly necessary to establish performance against study objectives. This will help ensure that the level of monitoring and evaluation is proportionate to the study.

Post-Implementation Reporting

Table 1-6 summarises indicative performance indicators which could be employed as the basis for the process evaluation.

Table 1-6: Indicative Evaluation Performance Indicators

Criteria	Performance indicator/measure	Performance target	Source of indicator	Monitoring method and frequency
Costs	Proportion of actual costs over budget, including realisation of risk	X% of budget exceedance	Project costs	Budget and cost comparison – after implementation
	Proportion of budget allocated to ACC which was actually spent within timescale	X% budget spent by completion	Project costs by time	Project costs by time – after implementation

Criteria	Performance indicator/measure	Performance target	Source of indicator	Monitoring method and frequency
Views	The extent to which (stakeholder, public) consultation influenced outcomes	Significant number of views taken into account	Consultation process	Qualitative examination of consultation, by group
	Stakeholder's views on how well the project was designed and implemented	Overall positive views	Stakeholder interviews	Qualitative survey results by group – after implementation
Transport	The extent to which expected results reflect reality	Change in walking, wheeling and cycle trips.	Walking, wheeling, cycle counts	Comparison between modelled and actual – after implementation and again one year later

It is proposed to utilise ACC's Post Project Evaluation template, located on the Corporate Project Management Toolkit online to report the findings of the assessment at 12 to 24 months after introduction, and 3-5 years after introduction.

- 12 to 24 months after evaluation: this report will provide an early indication (as far as is practicable) that the project is operating as planned and is on-track to achieve its objectives. It will also provide a Process Evaluation including an assessment of actual vs. forecast project cost, and programme, together with reasons for variance.
- 3-5 years after evaluation: This second evaluation will consider the project's impacts, whether it has achieved its objectives and reviews the actual impacts against forecasts and determines the causes of any variances.

1.11 Project Closure

The exact arrangements for project close out have yet to be confirmed at the OBC stage. Further consideration to this area will be reported at the FBC stage.

It is however envisaged that project close out activities will be undertaken once the new infrastructure works are transitioned fully to operations. The composition of stakeholders involved in such project close out activities will depend on the eventual specification of the project – however, it is envisaged it will include as a minimum, ACC, Nestrans, and the appointed contractor.

Final reporting is proposed to be undertaken 3-5 years after scheme opening as part of benefit realisation / monitoring and evaluation activities. Evidence compiled as part of this process will be disseminated to inform lessons management processes.