

## **Transcript of Strategy video**

Better value rail is a joint Department for Transport, Office of Rail and Road and Network Rail initiative to help those with an early idea for a rail infrastructure project.

The better value rail toolkit helps people make better decisions earlier, identify the right transport solution, which may not necessarily be rail, saving time and money later on.

This video is aimed to help you work your way through the toolkit. Explain the purpose of the tools and how to use them.

The toolkit is separated into four different sections.

Firstly, strategy that looks at the overall objectives, explore that looks at the options for how to achieve those goals.

Examine that looks more closely at the issues involved in potential solutions and overall a section on culture and capability around the underlying approach to project development.

In this video we will be looking at strategy.

Strategy section is about developing strategic objectives to set the scope of the project and understand the problem you are addressing. Having a set of clear objectives is important to allow a project to measure its delivery against these objectives.

It also keeps a project focused on the problem that is to be solved.

The objectives built here should be regularly visited at key decision points to keep the project on track for delivering benefits rather than focus on building infrastructure.

The first tool in this section is designed to help you think about why you were doing the project without focusing on transport at this stage.

The strategic context checklist allows you to think about the nature of the problem that you are trying to solve. The outcomes of this tool lead to defining the strategic context and means you're starting to develop strategic objectives.

The tool asks you the question, why is this project required?

There are several prompt questions here that may fit your project, but if they don't you should start framing the problem you're trying to solve.

Make sure you have a diverse range of input at this stage from stakeholders as collaboration means the strategic objectives are more universally agreed, allowing your project to gain more support from the very start.

The questions here may appear simple, but their intention is to actually to provoke discussion and thought in the project team and in widest stakeholders that will bring out the necessary consensus.

You should use this tool on the outset of your project to define the strategic objectives.

You should also revisit this tool at key decision points to focus a project back on the objectives and keep the project on track to deliver benefits.

The next tool, the strategic narrative tool, expands on the strategic context developed by the checklist in the previous tool.

This will help you develop the objectives in more detail.

This tool considers a list of potential objectives that you can use or develop your own.

The aim is to articulate the problem to someone who might not understand the situation, but you should stay focused on the strategic objectives and still not mentioned railway or other transport solutions.

The tool gives you a list of potential objectives, for example, generating socio economic growth or linking population centres to education and employment.

You should work on the objectives that are relevant to your project, linking the potential outcomes of the project to the objective.

You should use smart objectives to do this. That means that means they should be specific, measurable, attainable, realistic, and timely.

This makes the objective more real and identifiable.

As with the previous tool, the prompts here are relatively simple, but intended to provoke discussion and debate in the project team.

It's best to use this tool after you understand the problem the project is meant to address.

The tool is meant to expand on the overall problem to allow the strategic objectives of the project to be realized.

The next tool looks at the vision for the project.

The outcome of this tool is to create a vision statement to summarize the purpose of the project in a way that is understandable to everyone in the project and beyond.

You're meant to use this tool to tell a story about what you're trying to achieve and create the main focus of the project.

The vision statement should remind everyone why you are doing this project. To minimize the risk of you getting side-tracked as the project develops.

A challenge is for you to not use the word railway at any point in your vision statement, as that shouldn't be the main purpose of your project. It should always link back to the problem you're trying to solve-your strategic objectives.

Some key principles to writing your vision are set out within the tool. Alongside some examples of good vision statements.

The vision statement should be short and reflect the outcome of the project in plain English.

It should be something that anyone involved in the project can relate to, regardless of their role.

You should use this tool early in the process to nail down the purpose of your project.

After you've realized the problem you're trying to solve.

The vision statement should be created before starting to go into detail in deciding the project and the people that will be involved, as it will keep everyone focused on the vision through all the decision points ahead.

Next, we have the pause or proceed plan tool.

The pause or proceed plan is about planning a potential exit strategy and whether you have the correct strategic objectives for your project.

The tool gives the opportunity to review your project and realign it to the strategic objectives.

You should be thinking about why you are solving this problem and start agreeing with stakeholders in this early stage when you would pause or stop the project.

Agreeing these rules up front helps to prevent scope creep further along. That makes the project on affordable or creating a project that no longer delivers on the strategic objectives.

The tool also helps set ground rules with stakeholders agreeing under what circumstances the project is taken forward or not.

The tool presents different steps asking why and when you might stop or pause the project. What everybody's role in that may be.

You should work through all these questions with your stakeholders and come to an agreement together on all the questions in the tool.

It's also useful to think about what would happen if you did nothing. It helps considers the consequences of inaction.

The tool should be used fairly early on to set the ground rules, but after that can be used regularly through the project, especially when changes in the development may mean reviewing the strategic objectives.

Asking these questions at the outset should drive teams to define and deliver better projects and help to manage the scope.

Once the strategic objectives are in place and there is a coherent vision, then you can go on to looking at how transport might help deliver the solution.

The transport hierarchy tool shows a hierarchy of transport solutions.

Active travel mode should be considered first as the best solutions for public health and the environment and often have the shortest planning a delivery timescales.

Only once they've been ruled out should the other modes be considered.

The tool helps justify and document your choices and start to articulate the transport problem.

The transport hierarchy shows which modes should be considered first. You should work down the hierarchy and decide which mode is the most appropriate for the problem you're trying to solve.

Make sure you document your decision-making process.

You should use this tool after you've agreed your strategic problem and that transport is part of the solution.

This tool will then help you decide what transport solution is best.

The hierarchy is not a fixed rule, of course, and some solutions may involve a combination of modes.

Again, this is a relatively simple tool, but the benefits come from the discussion and analysis that are part of making the justifications about why particular motor transport are or are not appropriate.

The multi-modal assessment tool helps you to identify which public transport option is the most appropriate for your project.

If in the transport hierarchy tool you decided public transport is part of the solution, this tool will help you to start thinking about what mode or modes of public transport are the most appropriate.

It also gives you an overview about each modes capabilities, but the tool does not cover every parameter that needs to be considered.

The link from here is to transport mode comparison tool.

This tool allows you to use sliders and drop down boxes to suggest what might be appropriate methods of public transport for the criteria.

The questions asked are: whether it must be compatible with freight; the number of passengers per hour per direction; the optimum passenger vehicle speed; station spacing; vehicle capacity; a need for level boarding and whether the system needed to connect into the heavy rail network.

The methods of public transport at the covered in this tool are: Buses, light rail, trams, tram train, intercity mainline trains and suburban trains.

The tool is not intended to be a definitive guide but will help to keep options to the forefront.

It should be borne in mind that this tool, in combination with the transport hierarchy, is a relatively simple view, and you might also need to consider mixed mode solutions such as park and ride.

It's best to use this tool after you determine public transport is the solution to the problem to help you stop to think about what method of transport may be most appropriate.

The important outcomes of this early stage are that you can document your strategic objectives and vision statement clearly and in a way that makes them easy to continue to revisit throughout your project.

This will make it easier for the project to stay on track and to continue to focus on the benefits that it is trying to realize.

Tools like the transport mode finder are only a start and you should begin to work with transport experts to start to determine what is the most appropriate transport solution for your project.

This section only covers the basic parameters and determinations for the different public transport methods and other stakeholders should be involved to start the more detailed exploration of the appropriateness of the transport solution for the problem you're trying to solve.

If a rail-based infrastructure or service changes most appropriate, then you should go onto the Explore section of the website.

Any feedback you wish to send the team would be welcome.

We're always looking to improve the site and the tools that are on it. If you use the tools in development of your project we would also love to hear about that and potentially use it as a case study on the website. So please contact us.