

Better Value Rail

Strategy Toolkit

Strategic Context Checklist Template

This tool should be regularly revisited as part of an iterative process to ensure the relevance of the strategic context, which may change over time.

To make your proposal as strong as possible, capture the strategic context. The strategic context is the ‘why?’ behind your idea. To capture and be clear on the strategic context start by asking “Why are we proposing this?” and ask “why” repeatedly.

For example:

Q: Why are we proposing this?

A: To access regional development funding.

Q: Why?

A: To invest in better rail links for the people of X

Q: Why?

A: Because they need better ways to access jobs and learning.

Q: Why?

A: Because unlocking this region’s economic potential needs skilled people working in good jobs.

Once you have filled in the checklist, you should be able to clearly define the case for change. This could look like:

Strategic Context = Achieve regional economic improvement by aligning with government regional development policy.

You can capture the strategic context using a checklist like the one below.

The example below has some typical strategic context examples as a prompt. You could use these or find others – the key is to be relevant and true to your own proposal.

You should use the ‘details’ column to provide further scheme specific details to the strategic context, and consider and capture the implications of ‘doing nothing’

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Strategic Context	Details
Meeting Funder Policies or Strategies	
Is this required to satisfy the requirements of a change in the law?	
Is this required to satisfy the requirements of a change in policy or strategy?	
Is this required to deliver on existing approved policy or plans?	
Is this required in the context of the wider funding portfolio? (e.g. are there any other project or programmes that the objective could be aligned to or delivered by)	
Enabling social, environmental, and economic benefits	
Is this required to allow a beneficial activity to continue?	
Is this required to start a new activity?	
Is this required to achieve a new goal?	
Capturing an opportunity	
Does this meet the conditions of a pre-existing opportunity? (e.g. Competition, innovation challenge or funding source).	
Predicted or future considerations	
Does this align with future transport emission targets? (e.g. 2030 vehicle emission targets)	
Does this consider known technology updates? (e.g. digital railway, self-driving vehicles)	

Give some thought to who should be in the team helping you do this work. Collaboration is key at this stage and getting great strategic objectives agreed needs diverse input.