LEEDS RAILWAY STATION SOUTHERN ENTRANCE

Monitoring and Evaluation Plan
Metro West Yorkshire PTE

24/05/2013

Revised: 24/09/2013
## Quality Management

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LEEDS RAILWAY STATION SOUTHERN ENTRANCE
Monitoring and Evaluation Plan

24/09/2013

Client
Metro
Wellington House
40 – 50 Wellington Street
Leeds
LS1 2DE

Consultant
WSP UK
Tel: +44 (0)113 395 6200
Fax: +44(0)113 395 6201
www.wspgroup.co.uk

Registered Address
WSP UK Limited
01383511
WSP House, 70 Chancery Lane, London, WC2A 1AF

WSP Contacts
Robert Rodger
Mike Holmes
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1 Introduction

1.1 Introduction

1.1.1 Metro is the lead promoter for this proposed major scheme to provide a new southern pedestrian entrance to Leeds Railway Station. WSP has been commissioned by Metro to produce a Scheme Evaluation Plan for the major scheme business case. This is the first stage in developing an Evaluation Plan for the scheme and the plan will be subject to further refinement in response to comments from the Department for Transport (DfT).

1.2 Evaluation Context

1.2.1 In accordance with guidance set out in ‘Monitoring and Evaluation Framework for Local Authority Major Schemes’ (Department for Transport, September 2012), there is a requirement that transport business cases are accompanied by an Evaluation Plan to set out clear arrangements for monitoring and evaluation.

1.2.2 Guidance is provided on the level of evaluation that is expected for different categories of Major Scheme to ensure that evaluation effort and expense is proportionate to the size of the scheme. The guidance specifies that the Leeds Station Southern Entrance (LSSE) scheme requires a ‘Standard’ level of monitoring and evaluation, rather than ‘Enhanced’ or ‘Fuller’ evaluations. This document provides a draft of the Evaluation Plan for discussion with the DfT prior to drafting and submission of the final document.

1.3 Report Structure

1.3.1 To ensure that the Evaluation Plan satisfactorily identifies the benefits to be realised as part of this scheme, we have incorporated best practice and current guidance from the following documents in to our methodology:

- Monitoring and Evaluation Framework for Local Authority Major Schemes, (DfT, September 2012);
- Guidance for Transport Impact Evaluations: Choosing an evaluation approach to achieve better attribution (Tavistock Institute, March 2010);
- HM Treasury Magenta Book: Guidance for Evaluation (HM Treasury, April 2011); and
- Logic mapping: hints and tips for better transport evaluations (Tavistock Institute, March 2010).

1.3.2 The remainder of this report is structured as follows:

- Overview of Scheme Objectives: Describes the main characteristics of the scheme and it’s high level objectives;
- Evaluation of Objectives and Principles: Sets out the general approach to developing the evaluation plan and capturing benefits;
- Data Collection: Sets out details of the evaluation approach for this scheme to capture performance against both scheme specific and WebTAG based objectives;
- Management and Reporting: Details the reporting and monitoring procedures to be adopted to ensure cost efficient and timely benefits realisation processes; and
- Summary and Recommendations: Provides a summary and the recommendations of the report.
2 Overview of Scheme Objectives

2.1 Scheme Context

2.1.1 Leeds City Station is one of Network Rail’s seventeen managed stations, serving Leeds city centre with local, regional and inter-city rail services. Network Rail counts indicate that at present, it hosts over 36 million passengers per annum (or 100,000 per day).

2.1.2 The main Station entrance primarily serves City Square and destinations to the north of the station beyond. Passengers wanting to access or exit the Station from the south have no alternative but to pass through the tunnel of Neville Street beneath the Station and access the Station entrance via the ‘Rotunda’ steps. The ‘step-free’ access is even longer, with passengers having to continue from Neville Street, onto Bishopgate Street and accessing the main entrance via New Station Street.

2.1.3 The LSSE scheme will provide an accessible, direct pedestrian link to and from the southern section of Leeds City Centre from Leeds Railway Station.

2.1.4 Recent work undertaken as part of the ‘Transport for Leeds’ programme of studies has estimated that jobs in the City Centre as a whole will increase from around 102,000 in 2009 to 108,00 (+8%) in 2018 and 118,00 (+16%) in 2030. A large proportion of these new jobs are likely to be located in the expanding southern quarter of the city centre. The scheme will support the redevelopment and regeneration in the southern quarter of the city centre by providing improved accessibility to rail services.

2.1.5 It is estimated that 20% of passengers (approximately 20,000 passengers per day) using Leeds Railway Station would use the proposed southern entrance. On average it is estimated that each of these passengers would save an estimated time saving of over 2 minutes for each trip to or from the station.

2.1.6 The scheme provides an enclosed structure that incorporates lifts, escalators and stairs to provide passengers with access to / from the current western footbridge within the station to / from ground level either side of the River Aire. The proposals also include CCTV, lighting, ticket machines, passenger information screens, ticket barriers, cycle parking and measures to improve pedestrian access in the immediate surrounding area.

2.2 Scheme Objectives

2.2.1 The three primary objectives of the LSSE scheme, as highlighted in the Best and Final Funding Bid produced as part of the Local Authority Major Scheme submission, can be summarised as follows:

- To support regeneration and redevelopment in the southern quarter of the city centre;
- To reduce journey times accessing Leeds Railway Station to/from the south; and
- To ensure the passenger flows through Leeds Railway Station and to the south of the station are improved.

2.2.2 Consideration is given to the evaluation of the scheme objectives in the following section.
3  Evaluation Objectives & Principles

3.1  Introduction

3.1.1  The purpose of scheme evaluation and monitoring is to understand if, how and why the intended outcomes and impacts of a scheme have been achieved or exceeded.

3.1.2  DfT guidance documents on evaluation explain that scheme evaluations are carried out in order to:
- Provide accountability for the investment;
- Provide evidence for future spending decisions;
- Learn about which schemes deliver cost-effective transport solutions;
- Enhance the operational effectiveness of existing schemes or future scheme extensions; and
- Improve future initiatives based on learning.

3.1.3  Based on DfT guidance it is assumed that the scheme will require a ‘Standard’ level of monitoring and evaluation.

3.1.4  The latest DfT guidance promotes the use of standard metrics in order to provide a consistent understanding of the impacts of schemes and lessons learnt exercises.

3.1.5  The various measures of a scheme can be categorised in the following way:
- Inputs (investment of resources and activities);
- Outputs (schemes to be delivered);
- Outcomes (short and medium term results, such as traffic volume changes and land use development); and
- Impacts (longer term results such as wider economic development or a better quality of life).

3.1.6  The evaluation will therefore need to cover a range of outcomes and impacts and provide an analysis of why these have occurred.

3.2  Evaluation Objectives

3.2.1  Guidance for Transport Impact Evaluations indicates that “The purpose of evaluating schemes is to justify the investment into a particular endeavour (e.g. a major scheme) and therefore to assess whether the anticipated benefits have been achieved. It is also valuable to test the underlying appraisal assumptions and to learn more about how impacts were achieved”.

3.2.2  The key features of the scheme business case are to reduce journey times accessing Leeds Railway Station to/from the south and to improve passenger flows through Leeds Railway Station and to the south of the station, which will in turn support regeneration and redevelopment to the south of the station.

3.2.3  The evaluation will therefore need to examine if the scheme has improved access to the station and reduced journey times from the south of the station and the impacts on re-development to the south of the station.
3.3 Logic Map

3.3.1 A draft intervention logic map has been produced based on the LSSE scheme proposals and objectives and guidance in ‘Guidance for Transport Impact Evaluations’ (Figure 3.1). This systematically links key components of the intervention so as to produce a causal pathway across the:
- Inputs (i.e. what is being invested in terms of resources and activities);
- Outputs (e.g. target groups, infrastructure provided, new services);
- Outcomes (i.e. short and medium-term results, such as changes in traffic flow levels and modal shift); and
- Impacts (i.e. long-term results such as better quality of life, improved health, environmental benefits etc.).

3.3.2 The logic map reflects the outcomes and longer term impacts of the scheme based on the Primary Objectives.

Figure 3.1 Intervention Logic Map
4 Data Collection

4.1 Introduction

4.1.1 As set out in ‘Monitoring and Evaluation Framework for Local Authority Major Schemes’ all schemes are required to be monitored against a set of standard measures, which can be summarised as follows:
- Scheme build;
- Delivered scheme;
- Costs;
- Scheme Objectives;
- Travel Demand;
- Travel times and reliability of travel times;
- Impacts on the economy; and
- Carbon impacts.

4.1.2 ‘Monitoring and Evaluation Framework for Local Authority Major Schemes’ also sets out that for non-maintenance scheme types the standard measures should be reported in both a ‘One Year After’ and ‘Final’ evaluation report.

4.1.3 The following sections set out the information required to evaluate the LSSE scheme against the standard measures.

4.2 Scheme Build

4.2.1 DfT requires scheme evaluations to assess the management of each project before and during construction. This information will be presented in the One Year After report.

4.2.2 The work programme and project plan for the scheme will be included and this will be measured against actual delivery at key milestones. Variations in the programme will be recorded in the change log along with the reason for the change in timescales. The stakeholder management and risk management processes will be monitored by the Project Manager and effectiveness will also be evaluated in the report. These topics will be raised and discussed at Project Board, and monitored through direct contact with stakeholders (stakeholder management) to seek their views on effectiveness, and by a post evaluation of the risk management process to ascertain whether risks were correctly identified, and that mitigation was appropriate and sufficient.

4.2.3 Changes in any of the mitigation methods (actual mitigation carried out, compared to what was proposed in the original project risk register) will be recorded. The output from this exercise will be a lessons learned log and change log.

4.2.4 The Transport and Works Act Order (TWAO) application to the Secretary of State included a Constructability Review report produced for the LSSE by Carillion (dated April 2012). This report includes a Master Programme for the project. Whilst some of the pre-construction timescales in the Master Programme have been developed since its production, it provides a useful starting point for monitoring of progress against programme during construction.
4.3 Delivered Scheme

4.3.1 The first stage of the evaluation plan is to present a full description of the scheme outputs in the ‘One Year After’ Report. This will include a description and drawings that present all elements of the scheme and any changes to the scheme that were made between funding approval and implementation. Any assumptions that have been made need to be presented and then compared with the actual inputs/outcomes. The project team member or consultants undertaking the evaluation will assess the actual inputs as quantified, and the measured outcomes to identify any variances. This will be recorded in the change log.

4.3.2 Baseline drawings for the scheme will be taken from the Deposited Plans and Sections, Traffic Regulations and Rights of Way Plan and Planning Direction Drawings provided as part of the Transport and Works Act Order application.

4.4 Costs

4.4.1 The forecast cost will be compared against the outturn investment cost of the scheme in order to produce an actual Present Value of Costs (PVC). This PVC can then be used to produce an observed Benefit Cost Ratio when it is compared against the evaluated monetary benefits of the scheme. Forecast costs for the scheme will be based on the Estimate of Costs provided as part of the Transport and Works Act Order application, and cost estimates submitted with the Financial Appraisal.

4.4.2 The Target Cost value from the Full Approval submission for funding will also be used as a comparison against the outturn investment cost. It is anticipated that this figure will be available at the end of July.

4.4.3 Scheme costs will be broken down into individual elements in order to identify where cost savings and overruns occurred.

4.4.4 The assumptions that were made about project risk will be compared with the manifestation of these risks and the main reasons for any cost savings or cost overruns will be presented.

4.5 Traffic Impact

Traffic Volume

4.5.1 As the proposed scheme is for a pedestrian entrance to the station the impact on vehicular traffic movements in the vicinity of the station is expected to be limited. However, there are likely to be significant impacts on the pedestrian movements in the vicinity of the station both at the proposed south entrance itself and corresponding impacts at the existing main station entrance.

4.5.2 In order to monitor these changes in pedestrian movements at the station accesses, it is proposed to undertake a post opening evaluation of pedestrian flows at the one year and five year after opening evaluations using a methodology that is consistent with the baseline.

4.5.3 Existing baseline information is available on pedestrian movements at the station from the studies that have been carried out in preparing the information submitted for the Transport and Works Act Order application and Funding Bid package.¹

¹ The Leeds Railway Station (Southern Entrance) Order 296480/RPT10 Revision C - Transport Statement (Section 4.2)
4.5.4 The updated pedestrian modelling is based on a footfall count undertaken by Jacobs in 2008 of exit flows at the station. The footfall survey was carried out over three hours in each of the peaks with the survey undertaken on a Wednesday in October 2008. As the footfall counts were ‘exit only’ an entry/exit split was derived by Hyder from previous counts.

4.5.5 The 2008 counts were the most comprehensive of the sets of monitoring data collected, and therefore they are being used as the baseline, but have been checked against previous and subsequent counts and entry/exit splits, in order to inform the pedestrian modelling exercises which were actually completed in early 2012.

4.5.6 To growth the 2008 flows Hyder were requested to utilise the Leeds ‘High’ growth forecast of 62% from 2008 to 2029, based on the Northern Route Utilisation Strategy (RUS). It has been agreed that no additional background growth is to be included as RUS includes strategic land development aspirations.

4.5.7 It is not appropriate to measure overall travel demand by rail, as many train passengers passing through Leeds Station will interchange between trains and in some cases between Train Operating Companies, rather than using the existing or new entrance, therefore making them ‘out of scope’.

4.5.8 It is therefore proposed that the pedestrian flow assumptions adopted in the Pedestrian Modelling report produced by Hyder (submitted in support of the TWAo as set out above) are adopted as the baseline for monitoring purposes. The baseline flows are summarised in Table 4.1. These are taken from Table 1.2 of the Hyder ‘Normal’ Operation Modelling Assumptions report and represent actual counts taken to validate the baseline in the model. The future forecast flows will be used to compare against actual future pedestrian counts and any variations will be recorded.

Table 4.1 Pedestrian Baseline Flows

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4.5.9 The existing pedestrian flow information would need to be supplemented with surveys at both station entrances in order to identify changes in flows following the implementation of the scheme.

4.5.10 A programme of proposed pedestrian traffic surveys will be drawn up and this data will be collected at the post-scheme evaluation stages. The methodology for the future counts will be consistent with that of the baseline, to maintain comparability, and will therefore consist of a footfall survey carried out over three hours in each of the peaks (07:00 – 10:00 and 16:00 – 19:00) with the survey being undertaken on a Wednesday in October (or a comparable month). It is proposed the survey is carried out on three occasions with the average of the three counts being taken as the actual.

4.5.11 The impact of the scheme is unlikely to be significant beyond the immediate vicinity of the station access and therefore additional monitoring of pedestrian movements beyond the station entrances is not proposed. Future counts will clearly need to include both north and south entrances.

Journey Times

4.5.12 One of the primary objectives of the scheme is to reduce pedestrian journey times for access to the station. This is based on a reduction in the physical distance travelled by rail users accessing the site from areas south of the station.
4.5.13 The passenger flow monitoring information identified above will also allow the overall time savings for passengers using the southern entrance to be derived based on the numbers of passengers observed using the new southern entrance (multiplied by the assumed individual time saving per person).

4.5.14 Additional journey time information is not considered necessary as the impact of the proposed scheme would be primarily related to pedestrian walk times and therefore vehicle journey times are unlikely to be affected.

4.6 Economy

4.6.1 It is unlikely that a One Year After report would provide sufficient time following the implementation of the scheme for any significant impacts on regeneration/re-development of the area to the south of the station to have taken place. More detailed assessment of the economic impacts of the scheme would therefore be provided in the Final evaluation report.

4.6.2 Information required to monitor the economic impacts of the proposed scheme will include the following:

- The level and type of development that has materialised (new start-ups, relocations, expansions); and
- Rental values.

4.6.3 Details of development that takes place within the city centre to the south of the station should be available from Leeds City Council as the planning authority. A plan showing the extent of the area to be monitored is included at Appendix A. The extent of the monitoring area is based on the pedestrian catchment assumed in the pedestrian modelling of the new access and included in Figure 4.1 of the Mott Macdonald Transport Statement produced for the LSSE.

4.6.4 Details of existing rental values are available for a range of property types in the Leeds CIL Economic Viability Assessment Report produced by GVA on behalf of LCC. This provides a baseline for measurement of any changes in rental values within the monitoring area following the implementation of the LSSE, which will again be provided by GVA from their property market monitoring exercises.

4.6.5 The monitoring will include:

- Baseline and Post Construction - a baseline and future state for rental values and levels of occupancy (including vacant plots/development sites); and
- Post Construction - Anecdotal views from developers/occupiers/agents who are within the area of monitoring to assess whether they consider LSSE has had an impact (encouraged occupation, benefits to staff, etc.).

4.7 Carbon

4.7.1 As the scheme is unlikely to result in a significant impact on vehicle movements the carbon impact of the development would be limited to the construction phase. No further monitoring other than that proposed for pedestrian movements/journey times is therefore proposed.

4.7.2 Whilst the carbon impact of the LSSE scheme on traffic is expected to be minimal due to its limited impact on vehicular movements the carbon impact of the construction of the scheme has been considered in the Climate Change Management Assessment.
4.7.3 The Climate Change Management Assessment identifies the carbon emissions of the scheme both during construction and once operational. The emissions associated with the construction phase equate to 4,820 tCO2 with emissions as a result of the operation of the scheme of 8,950 tCO2, assuming a 60 year lifecycle. These figures are based on information in the Constructability Review and the Energy Demand Assessment.

4.7.4 The Climate Change Management Assessment also identifies potential measures to mitigate the impact of the scheme to be considered further during the detailed design (GRIP Stage 5) and construction of the scheme. These include measures such as:
- Consider potential for using re-cycled materials;
- Consideration of GHG emissions within the Construction Environmental Management Plan; and
- Minimising waste and maximising reuse of materials.

4.7.5 The scheme includes the use of natural ventilation in order to minimise the energy requirements of the scheme once operational.

4.7.6 The monitoring proposed for the Scheme Build and Delivered Scheme phases of development will identify any changes to the design of the scheme or construction processes that would impact on the carbon emissions of the scheme. The monitoring will include identifying changes to those measures identified in the Climate Change Management Assessment as potential mitigation for the carbon emissions of the scheme.

4.8 Data Table
4.8.1 Table 4.2 below summarises the data to be used to monitor the impacts of the LSSE scheme. The table sets out the standard measures and the information to be used to establish the baseline and post implementation position. It also indicates who would be responsible for obtaining the monitoring data and any dependency on information/ input from other stakeholders in the implementation of the scheme.
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5 Management and Reporting

5.1 Evaluation Milestones and Outputs

5.1.1 It is proposed that the evaluation process consists of 2 phases. This programme assumes project milestones of Full DfT approval in July/August 2013 and main construction commencement in Spring 2014:

- Phase 1: One Year After Evaluation Study (2015); and
- Phase 2: Five Year After Evaluation Study (2020).

5.1.2 Based on the proposed data collection required for evaluation of the scheme it is considered that appropriate baseline information is available for the majority of evaluation criteria, particularly Traffic Impact. One Year After and Five Year After (Final) reports are therefore considered satisfactory to evaluate the impacts of the scheme.

5.1.3 The current project timeline, based on the project programme, is therefore as follows:

Figure 5.1 – Project and Monitoring Timeline

5.2 Phase 1 – One Year After Opening Evaluation Report (2016)

5.2.1 This report will focus primarily on the immediate impacts on access to the station and changes in pedestrian movements as a result of the scheme and the early signs of wider economic benefit. The report will include:

- A detailed description of the outturn scheme that was implemented, with final scheme costs and any changes that were made to the scheme after funding approval was granted;
- Transport network performance, including pedestrian traffic volumes, journey time savings, and changes in mode split; and
- Initial economic perceptions and outcomes, including land use changes or new development proposals related to the scheme.

5.3 Phase 2 – Five Year After Opening Evaluation Report (2020)

5.3.1 This report will look at the longer term impacts of the scheme on network performance and economic development. It will focus on the long term changes in pedestrian movements at the station as a result of the scheme and will provide an indication of any growth in pedestrian movements following the implementation of the scheme.

5.3.2 Evidence from the local planning authority will be used to build up a picture of the level and type of development that has taken place to the south of the station following the implementation of the scheme, and whether it met, exceeded or fell short of expectations.
5.3.3 The study will re-examine any significant issues that were raised at the One Year After stage. The Five Year After report will be able to draw more detailed conclusions about the impact of the scheme on pedestrian movements at the station. Any other residual issues with the project implementation will also be cleared up in this report.

5.4 Data Collection Responsibilities

5.4.1 It is anticipated that LCC/Metro/Network Rail will provide the basic data from which to carry out the majority of the evaluation, using their existing data collection processes. This data will need to be supplemented by data from other sources, or new data collected by them.

5.4.2 It is recommended that the promoting authorities appoint an officer to take overall responsibility for all aspects of the evaluation, to manage the evaluation programme and to procure consultancy support and survey contractors. This officer will be the Metro Project Manager. The Metro Project Manager reports to the Project Board. The Project Board members are as follows:

Table 5.1 – Project Board Members

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<th>Role</th>
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<tr>
<td>David Hoggarth</td>
<td>Metro</td>
<td>Director, Development (Project Executive)</td>
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<tr>
<td>Chris Mason</td>
<td>Metro</td>
<td>Rail Projects Manager (Project Director)</td>
</tr>
<tr>
<td>Nick Winney</td>
<td>Metro</td>
<td>Assistant Director, Legal</td>
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<td>Tom Gifford</td>
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<td>Project Manager</td>
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<td>Luan Anderson</td>
<td>Network Rail</td>
<td>Project Manager</td>
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<tr>
<td>Vanessa Conway</td>
<td>Network Rail</td>
<td>Senior Sponsor (Senior User)</td>
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<td>Mike Lyons</td>
<td>Network Rail</td>
<td>Route Delivery Director</td>
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<tr>
<td>Stephen Hind</td>
<td>Network Rail</td>
<td>Route Enhancement Manager (Senior Supplier)</td>
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<tr>
<td>Andrew Hall</td>
<td>Leeds City Council</td>
<td>Head of Transport Policy</td>
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<tr>
<td>Mark Duggleby</td>
<td>DIT Regional</td>
<td>DFT Northern Hub Team</td>
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<tr>
<td>Angela Hern</td>
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<td>Head of Stations</td>
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5.5 Evaluation Cost Summary

5.5.1 A cost estimate for the Scheme Evaluation Plan will be developed once the evaluation regime has been agreed with the DfT and the promoting authorities.

5.6 Dissemination Strategy to Stakeholders

5.6.1 The project has a full Communications Management Strategy, prepared by Metro and endorsed by the Project Board. Amongst other things, this document sets out a number of protocols including to determine when key communication activities must occur; to determine what information needs to be communicated and level of detail required; and to identify the person(s) responsible for communicating the information and the persons or groups who need to receive that information.
5.6.2 The Communications Management Strategy identifies the responsibility for compiling key reports rests with the Project Manager, and these are reported through the Project Board to the wider Stakeholder Group.

5.6.3 The Monitoring & Evaluation Report will therefore be prepared in accordance with these protocols and disseminated to the wider stakeholder group and DfT.
6 Summary and Recommendations

6.1.1 This Outline Scheme Evaluation Plan has set out the objectives, principles and methodology that will be applied to analyse and evaluate the changes that will occur as a result of the LSSE scheme.

6.1.2 The approach adopted for the evaluations is as follows:

- Phase 1: One Year After Evaluation Study (2015), that will be a comprehensive study that analyses scheme delivery and short term impacts on the transport network and economy; and
- Phase 2: Five Year After Evaluation Study (2020), that will be a comprehensive study that reassesses the scheme impacts but with greater emphasis on the longer term impacts.

6.1.3 The evaluation reports will monitor the extent to which the forecast outcomes and impacts are being delivered by the scheme and produce outturn results that can be compared with the appraisal forecasts. They will provide:

- A quantitative and qualitative analysis of scheme impacts consistent with the scheme specific objectives;
- Identification and description of discrepancies between forecast and outturn impacts; and
- Identification of key issues relating to appraisal and mitigation methods that will assist in the on-going improvement of partnering authority appraisal techniques and processes associated with the implementation of major transport schemes.
Appendices

Appendix One – Development Monitoring Area
TITLE: LSSE Monitoring and Evaluation Report

FIGURE No: Economic Monitoring Area

Key

- Economic Monitoring Area