

Elgin Traffic Management Programme

Western Distributor Road

Project Execution Plan

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INTRODUCTION

Purpose of the Project Execution Plan

This Project Execution Plan (PEP) is to guide the delivery of the Elgin Western Distributor Road (WDR) Scheme.

The PEP:

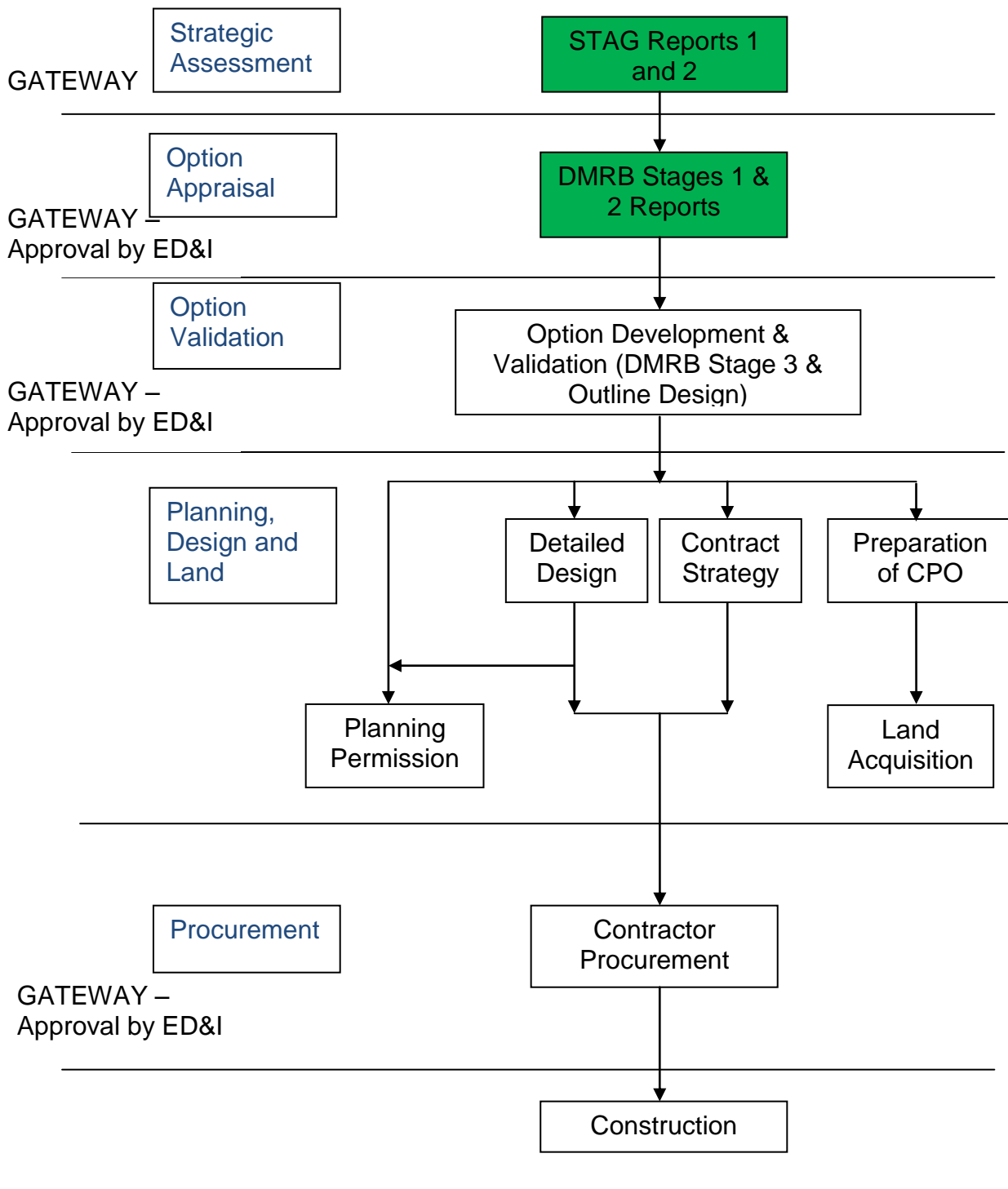
- identifies key tasks, risks and opportunities; ;
- sets out the process, resources and programme until construction start;
- defines roles and responsibilities; and
- indicates the programme to completion of the works.

Key Project Stages

The delivery of complex projects such as this involves a number of stages. The Transport Appraisal (STAG) was completed in 2007 and the Scheme has subsequently been through Stages 1 and 2 of the Design Manual for Roads and Bridges (DMRB) Scheme Appraisal process. Stage 3 includes developing the detailed design and, in parallel, the required consents and approvals.

Figure 1 below shows, in graphical form, the stages of the project.

Figure 1
Project Stages



PROJECT DEFINITION AND BRIEF

Introduction

The WDR forms a key part of the Elgin Traffic Management (ETM) Programme and has been identified in the Moray Local Plan since 2000.

The WDR, together with a number of other transport infrastructure improvements, facilitates economic development in the south of Elgin sustainably.

The route of the WDR was approved in principle by the Council's Economic Development & Infrastructure Services Committee in September 2011. This is summarised as:

“Providing a new link road between Edgar Road via Wittet Drive to the A96 and including a new roundabout on the A96 close to its junction with Sheriffmill Road. The route will include a new bridge over the railway line.”

As part of a legal agreement the Council is obliged to provide an access road and foul sewer to a proposed affordable housing site at Bilbohall. This access requirement will be met by the construction of the WDR.

Key Delivery Issues

Land Acquisition

Land acquisition is necessary for this Scheme, including demolition of two residential properties. The team has contacted affected land owners and the Council is working to acquire land by agreement. However, owing to the number of affected parties, any one of which could delay the Scheme, a Compulsory Purchase Order (CPO) is being prepared as agreed by Committee. The District Valuer acts as the Council's agent in negotiating land acquisition and compensation.

Designing Streets

The Designing Streets policy document issued by the Scottish Government gives advice on good practice when designing street layouts. The policy relates to all roads in urban areas. There is a community group promoting a “Designing Streets” approach and the detailed design will be carried out having regard to this policy. The design will be developed to balance the transportation aims while retaining a sense of “place”, particularly, but not only, along the existing section of Wittet Drive.

Ground Conditions and Drainage

The low-lying ground south of the railway line is wet and of very poor engineering quality. Ground investigation has been undertaken to inform the design process for roads and structures. Ground conditions represent a risk to be managed.

Access to Development Land

The Scheme will provide the necessary access to a number of individual housing sites and other developments identified in the Local Plan.

- R1 Bilbohall North: Robertson Homes wish to build further houses but require the new road to be constructed to provide access for these properties.

- R5 Bilbohall South: The legal agreement with Grampian Housing Association requires the Council to provide an access road and foul sewer to this site.
- R8 Hattonhill: The new road and junction with the A96 requires land from within this potential development site while the scheme can provide it with an access.
- R6 SW of Elgin High School: Potential housing development.
- ENV5: Potential new access to Elgin High School.

Rail and Trunk Road Interface

The Scheme requires the construction of a new bridge over the Inverness to Aberdeen railway line. This will necessitate liaison during the design and construction phases with Network Rail. There is a proposed new roundabout on the A96 Aberdeen to Inverness Trunk Road and its detailed design will require approval from Transport Scotland.

Planning and Economic Development

The economic issues surrounding the Scheme were identified in previous Committee reports. The need for this and other transport infrastructure improvements in Elgin (TSPs) has been highlighted and reinforced by their inclusion in the Moray Local Plan.

Liaison with planning officers will be necessary so that the design and resulting planning application meet requirements. Clarification is required on the preferred location and layout of the proposed affordable housing site at Bilbohall South. The Scheme requires planning permission which in turn requires a number of issues such as flood risk, environmental statement, traffic impact and the like. As a major development pre-application consultation is necessary.

Key Risks

There are a number of key issues that represent risks to the successful delivery of the Scheme. These include:

- Property acquisition and the CPO: Objections to the Order and any subsequent inquiry could delay the start of construction or prevent the scheme proceeding.
- Finance: the Council has recently approved a 10-year Financial Plan for Capital schemes. Funding for the WDR Scheme has been identified subject to annual review.
- Planning Permission: The Scheme requires planning permission and there is a risk of objections from parties most affected by the proposals.
- Transport Scotland and Network Rail represent risks because their approval is required for designs and they can influence construction programme and cost.
- There is a range of typical construction cost risks that will be included in the risk register that forms part of this PEP.
- Phasing the works: Careful phasing of the works will be needed to minimise the impact of construction on the existing road network in Elgin.

Opportunities

- Developer Contributions: The Council currently holds a significant amount of developer contribution which will be used to help finance the Scheme.
- A significant amount of fill is required for the embankment leading up to the bridge over the railway. Depending on the timetable for the construction, it may be possible for material to be obtained from the Elgin Flood Alleviation Scheme.
- The Scheme will open up for development the R5 Bilbohall South area which is zoned in the Local Plan for affordable housing. In addition Robertson Homes would also have the opportunity to build further houses at the R1 Bilbohall site.

APPROACHES AND INFLUENCES

Scheme Drivers and Objectives

The drivers and objectives of the Scheme are in line with the local and national priorities that the Council are working towards. These include the Elgin STAG Study, the Single Outcome Agreement (SOA) as well as the Council's own objectives including the Local Transport Strategy.

In addition, the key planning objective for the overall Elgin Traffic Management programme is

- *To provide a quicker, safer and more reliable transport system in and around Elgin while accommodating future development.[Elgin STAG Report 2007]*

ROLES AND RESPONSIBILITIES

The Team

The delivery of the WDR Scheme will primarily be undertaken jointly by staff from Moray Council together with those from Jacobs. In addition the District Valuer will provide the necessary support to enable land acquisition negotiations.

EC Harris, currently employed on Moray Flood Alleviation Schemes via the UK Government "Buying Solutions" framework contract will act as independent client adviser, principally on contract strategy and cost management. As cost consultants on the Flood Alleviation Schemes they could also be used in a similar role for this project as it develops.

The Moray Council

Roles:

- Client
- Designer for the section south of Wittet Drive.

Responsibilities:

- Funding;
- Project Management;
- Setting the objectives, success criteria and benefits of the Scheme;
- Leadership and direction, providing strategic decisions based on options and risks identified and presented;
- Promoting the Scheme and seeking commitment from stakeholders to delivery of the Scheme;
- Monitoring and reporting progress;
- Procurement;

- Managing consultants and contractors appointed to assist with delivery of the Scheme including authorisation of works and payments;
- Advising on operation and maintenance issues to ensure that the Scheme design reflects requirements;
- Asset management;
- Post Project Monitoring;
- Risk management;
- Stakeholder engagement;
- Reporting to The Moray Council and its Committees; and
- Managing public utilities.
- Estates services
- Legal support
- Budget management

Jacobs

Roles:

- Consulting Engineers advising and supporting the Council;
- Designer for works north of the railway line and the railway bridge; and
- Overseeing and co-ordinating the overall design.

Responsibilities:

- Providing professional services for scheme delivery;
- Managing changes to the design of the Scheme;
- Undertaking the role of Designer and CDM Coordinator as set out in the Construction (Design and Management) Regulations;
- Contributing to the risk management process;
- Planning and managing their services within the agreed overall framework;
- Reporting on scheme progress, risks and opportunities;
- Ensuring that quality controls are planned, performed and recorded correctly;
- Co-ordinate the delivery of enabling works until the construction stage;
- Preparing submissions for statutory consents;
- Design of roads, structures and ancillaries;
- Assisting in liaising with key affected parties and community engagement;
- Contract documentation.

District Valuer

- Advising the Council in matters relating to land acquisition and valuation; and
- Negotiating with affected parties in relation to the above.

EC Harris

- Advising on procurement and contract strategies
- Reviewing and advising on cost and risk.

Delivery Team Structure

An organisation structure showing how WDR fits into the Elgin Traffic Management Structure showing key activities and reporting lines is shown in Appendix A. It shows the Board, which acts as a strategic level steering group across the whole Elgin Traffic Management Programme.

In respect of WDR, the lead role has transferred from the Transportation Manager to Consultancy Manager because the project has passed the transportation planning stage and is now in detailed design moving towards delivery on the ground.

A number of Council functions will contribute to delivery and as regulators. This plan excludes the regulatory functions but for completeness regulators are marked * below.

- Consultancy (Bridges)*
- Consultancy (management and detailed design of south section)
- Transportation (planning application* and contribution to design)
- Roads Maintenance
- Public Transport
- Planning*
- Estates
- Finance
- Legal
- Community Engagement
- Public Relations
- Environmental Health*
- Consultancy (Flood Risk Management)*
- Economic Development

Others may be consultees or more closely involved depending on how the scheme develops.

PROCESS

Background

A number of tasks are seen as being critical to successful delivery of the Scheme.

The strategic assessment followed the Scottish Transport Appraisal Guidance (STAG) procedure and was completed in 2007. The recommendations from the STAG assessment were considered as part of the Design Manual for Roads and Bridges (DMRB) Scheme Assessment Process (TD37). The DMRB Stage 1 appraisal was completed in 2010 and the Stage 2 in 2011. This stage concluded with the acceptance of the preferred option in September 2011 and the approval to proceed with detailed design, planning application and land acquisition.

Option Validation

Following the approval in September 2011 the DMRB Stage 3 report is to be prepared. Preparation of this will run in parallel with the detailed design.

Design

Design of the scheme is being overseen by Jacobs but the Council is undertaking the design of the road south of the railway line. This will require careful management and good communication between the design teams. Stuart Burns of Jacobs will manage the overall design. Frank Knight will manage the Council's design team. The design parameters have yet to be established and this will be an early task. It links closely to engaging stakeholders. For example, recent helpful discussions with Elgin Designing Streets Action Group will be followed by an inclusive approach across a range of stakeholders towards setting objectives that will inform design parameters.

There are a number of design risks such as geotechnics, environment and transport authority requirements.

Land Acquisition

Land is required for the Scheme. The District Valuer negotiates land acquisition and compensation for the Council. A CPO will be submitted for approval of the Council. This will require input from Legal, Estates and Economic Development sections of the Council. This task is to be managed by Alex Burrell.

Planning Permission

Jacobs will prepare and submit the planning application to the Moray Council as agent for the applicant (also The Moray Council). This application will include plans, sections and outline construction details of all the scheme elements. In particular the appearance of the railway bridge will be of significance. The planning application will also include the Environmental Statement (ES) setting out scheme impacts and mitigation measures.

A pre-application consultation is required. This provides an opportunity for stakeholders to comment to the applicant on the proposed application and in turn the applicant has an opportunity to modify the proposals to take account of concerns expressed. This will also need to consider the relationship with any separate application for developing the affordable housing at Bilbohall South.

Community Engagement and Ownership

The Scheme is locally very sensitive, particularly along Wittet Drive and consequently proper engagement with the community is essential. A separate Stakeholder Engagement Strategy will be prepared outlining the proposals for this and the wider consultation. It is proposed that this Strategy be developed in consultation with stakeholders so that it is more effective. It will be guided by the National Standards for Community Engagement and the principles contained in "Moray Council: Community Engagement Scheme 2012-2016". These are:-

- Be open and responsive to the views of our communities.
- Involve local communities in identifying local need and creating solutions.
- Ensure sustained community involvement in the decision making process.
- Make clear our commitment to involving communities throughout Moray.
- Adhere to the National Standards for Community Engagement (Appendix1).
- Ensure fairness, equality, inclusion and continuous improvement.
- Ensure actions are outcome focused and deliverable.

The strategy will be submitted to the appropriate Committee.

PROGRAMME MANAGEMENT

General

The programme has been developed for the detailed design phase up to the submission of the planning application. It has been updated to reflect the recent community engagement to the end of January 2012. The programme beyond detailed design stage is less predictable and therefore presented only in outline, based on an optimistic view.

Progress will be monitored against the programme which will be reviewed regularly and updated as appropriate. The Project Manager will ensure that Members are kept advised of progress appropriately.

Milestone Dates and Targets

Currently the programme indicates a target of autumn/winter 2012 for the submission of a planning application. Thereafter milestones are indicated for contractor procurement and the construction period. These will be contingent upon statutory processes including any Public Local Inquiry. As the project progresses, the programme will be developed to include details of the contractor procurement and eventually also the construction phase of the scheme.

Indicative dates are:	
Submission of Planning Application	5 November 2012
Planning Approval (earliest)	22 February 2013
Construction Start (earliest)	Spring 2014
Access road to affordable housing site available (earliest)	Autumn 2014
WDR Completion (earliest)	Autumn 2015

Appendix B contains a graphical representation of the draft programme.

COST PLAN

General

The estimated project is that prepared for the DMRB Stage 2 Report and it includes both risk and optimism bias allowances. EC Harris will review the estimate and report on projected cost as the design develops and lead on risk management. At detailed design stage optimism bias is normally diminishing to zero.

The Project Manager is responsible for monitoring expenditure in liaison with Lorraine Paisey, Principal Accountant. A monthly meeting has been arranged and EC Harris will provide advice. Cost and budget management systems will therefore be similar to Moray Flood Alleviation Schemes and benefit from lessons learned.

Jacobs are instructed under the Elgin Traffic Management Framework Contract. Work Orders are issued by the Project Manager, clarified and priced by Jacobs and agreed by both parties. Progress on these Work Orders is monitored regularly both in terms of programme and cost. Work Orders to EC Harris would be managed likewise.

Risk Management

A risk register is to be prepared which will seek to identify all the significant risks to the successful delivery of the Scheme. The risk allowance will replace optimism bias in the cost estimate. This forms part of the aforementioned review of cost by EC Harris.

Funding

The Council has approved a 10-year Capital Plan which identifies a total of £14.6M for the Scheme across several budget heads. The Capital allocation to the Scheme will however require annual review. It is proposed to roll up the allocation for the extension of Edgar Road into the Elgin WDR heading. This makes financial management more flexible and reflects how the project will be managed. If there is smooth progress through the design,

land acquisition, planning and procurement stages of the project the funding allocation for the project could be reprofiled as follows:-

£,000	2012/13	2013/14	2014/15	2015/16	Total
WDR	800	2,000	6,000	4,500	13,300
Land Acquisition	1000			300	1,300
Total	1,800	2,000	6,000	4,800	14,600

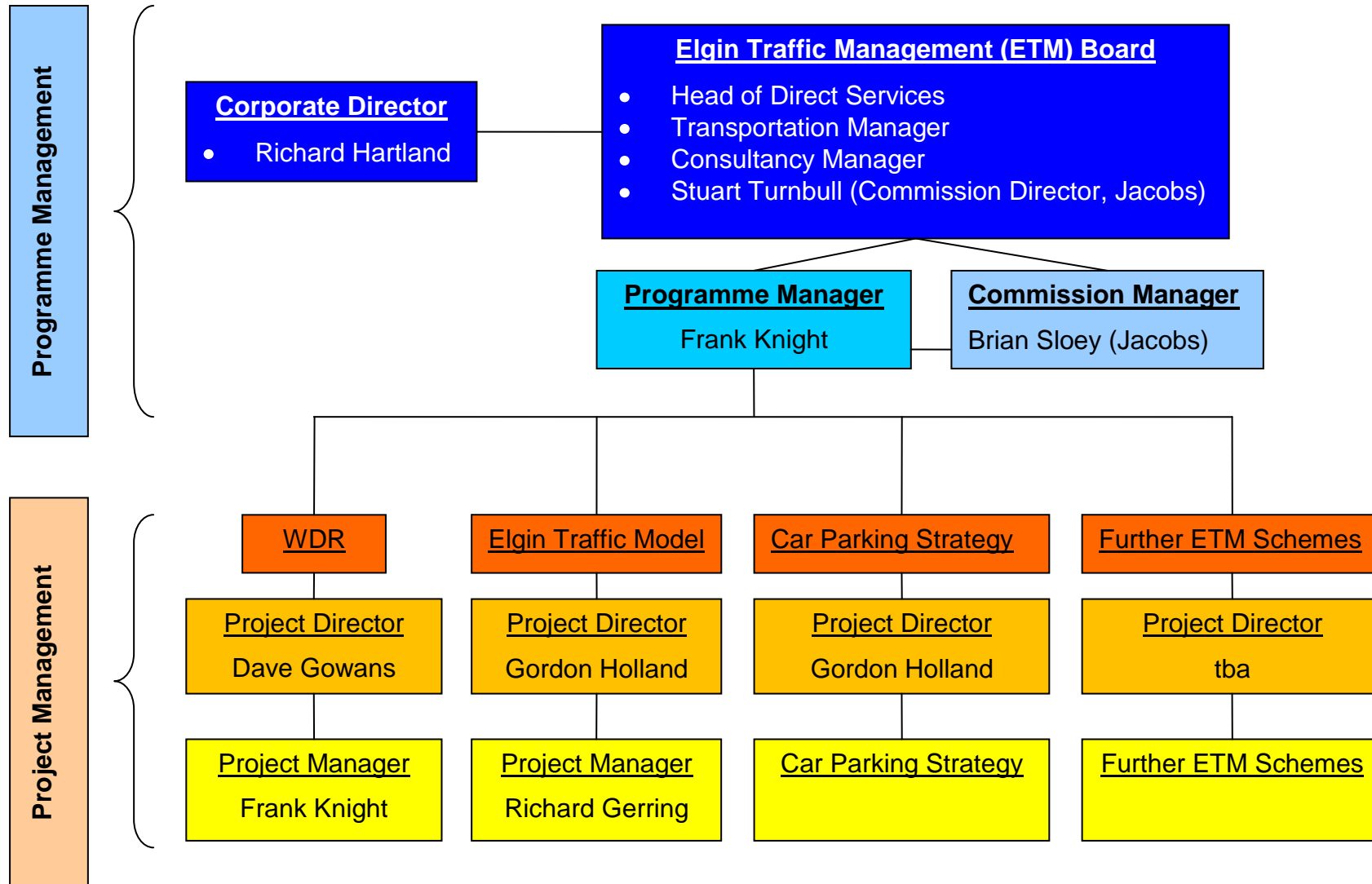
This will be reviewed as the project progresses and as part of the Council's annual budget setting process. Delays will affect the expenditure profile. The Capital Plan can accommodate this.

Summary and Conclusion

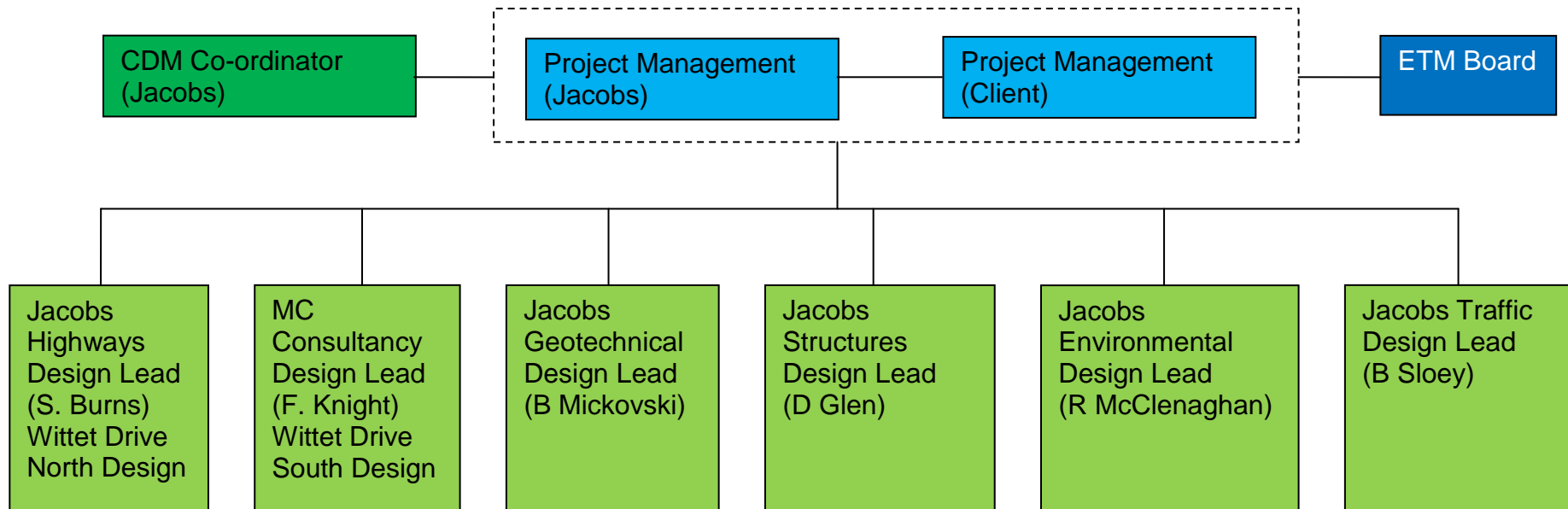
This PEP sets out a programme to completion of the WDR. It includes resourcing in terms of people, organisations roles, responsibilities and financial provision. It outlines proposals for managing cost and risk, statutory consents, reporting progress, engaging stakeholders, technical issues related to design and a programme towards completion.

It is a fundamental part of managing the project.

Appendix A Elgin Traffic Management - Structure



Western Distributor Road – Structure



Appendix B: Draft Programme

