

USING TRANSPORT INVESTMENT ONLINE

SEPTEMBER 2014

What you need to know and do, by when – for developing plans as part of the 2015-18 NLTP

BACKGROUND

Transport investment online (TIO) is the NZ Transport Agency's key source of project information and a record of investment decisions made in the National Land Transport Programme (NLTP). All activities funded through the NLTP are recorded in TIO, including the expected benefits and long term outcomes from each decision.

HOW TIO IS USED

TIO is used by our investment partners to submit regionally delivered activities for inclusion in regional land transport plans (RLTPs) and by regional transport committees (RTCs) to develop and prioritise their RLTPs.

The Transport Agency relies on the quality of information provided by approved organisations in TIO to make key decisions and carry out a number of activities. These include:

- understanding historic investments, planning current investments and forecasting future demand for investment
- prioritising investment proposals and allocating funding within each NLTP period
- approving funding, monitoring delivery and ensuring timely payment of claims
- end of year reporting for annual financial and performance monitoring
- mapping our current and proposed investments against the existing network and identified risks or issues
- demonstrating how the Transport Agency gives effect to the Government Policy Statement on Land Transport (GPS) and compliance with the Land Transport Management Act
- ensuring appropriate justification and transparency of the use of public funds
- reporting on expenditure, benefits and distribution of investments for policy analysis, ministerial and parliamentary questioning, Official Information Act requests, and to analyse the effectiveness of our policy and investment decisions.

NEW ACTIVITY FORMS

We have published updated and new forms for creating and submitting activities in TIO. These reflect changes to the Transport Agency's operating processes such as the business case approach, improvements in the *Economic evaluation manual* (EEM), and a greater focus on impacts, benefits and location based information.

The changes also improve the alignment between our policy and activity applications, making them easier to use.

- Terminology and processes for applying for funds are consistent with the business case approach.
- Key results targeted by the investments will be specified to assist the Transport Agency to establish how investments best meet short to medium term GPS results and long term outcomes, and how these are spatially distributed.
- More consistent forms for improvement activities will reduce re-work if costs exceed initial forecast estimates.
- The benefit and cost appraisal (previously economic efficiency) can be automatically uploaded using the EEM simplified procedures, or summary upload available on our website, and will make the underlying project assumptions and evidence more transparent (eg traffic growth and volumes).
- Making sure that the fields used to collect and use geospatial information are compatible with the reporting tools.
- Providing RTCs with more accurate data sooner, through better alignment between the state highway project management system and TIO.

All existing activities in TIO have been transferred to the new forms where necessary. However, you will need to review all activities to be submitted to the RTC and the Transport Agency, as part of the 2015-18 NLTP development process, to make sure the data is still accurate and up-to-date. This must include a review of the assessment profile for each activity.

OVERVIEW OF ACTIVITY FORMS

You can use the following forms to submit activities as part of developing your 2015-18 local and regional transport programmes (Activities tab > Create new activity):

- Maintenance and operations programme 2015-18.
- Public transport programme 2015-18.
- Road safety promotion 2015-18.
- Minor improvements (activities up to \$300,000).
- Improvements (activities over \$300,000).
- Programme business case and sub-programmes including WCO02, 003, 004 and business case support (replaces the previous strategies and packages templates).
- Resilience improvements (previously preventive maintenance).
- Emergency works.
- Regional land transport management (WC001).
- Ten-year forecast.

PROCESS REQUIREMENTS AND ACTION

TIO supports each stage of the NLTP development and delivery process including:

- creating a 'new activity' or advancing existing activities further (draft status)
- creating an approved organisation 'transport programme' (submitted to RTC status)
- creating a regional transport plan 'RLTP development' (included in RLTP status)
- developing the NLTP (included in NLTP status)
- prioritising the NLTP
- approving, reviewing and claiming activities (funding approved status).

It's a good opportunity to use the programme development period to clean up TIO and remove duplicates, old projects and phases that are no longer required.

To meet the requirements of the new six-year RLTPs, the Transport Agency requests that:

- all proposed activities are submitted for years 1-3
- significant individual activities are included for years 4-6
- total proposed investment by activity class is included in the 10-year forecast for years 4-10.

All remaining regional funding (R funds) under the current scheme must be assigned to individual activities by 1 July 2015. Transport activities which are to be funded from Crown appropriations, or the future investment fund, should also be included in TIO as part of the RLTP development. The Transport Agency will assign the activities to the Crown appropriation activity class (31).

All activities submitted to RTCs and the Transport Agency must use TIO as the repository of activity information. These activities will be assessed using the strategic fit, effectiveness and benefit and cost appraisal criteria as defined in the investment assessment framework.

RESOURCES AND TOOLS

- Visit the TIO website (<https://ltpo.nzta.govt.nz/pls/ltpoprod/main.login>) for:
 - > new and updated forms
 - > TIO user guides – located at the bottom of each page
 - > NLTP extract – allows extraction to Excel of activities entered into TIO for information and review. If you need help to access TIO, create activities or submit your transport programme, please contact your Transport Agency regional contact or send an email to pauline.gaskin@nzta.govt.nz.
- Visit the planning and investment knowledge base (<https://www.pikb.co.nz/>).
- Visit the Transport Agency's main website for detailed information about:
 - > the EEM (under resources section)
 - > EEM simplified procedures, or EEM summary upload for automatic population of TIO evaluation fields
 - > 2015-18 NLTP planning and investment signals.
- Take a look at the *Toward the NLTP timeline* (A3 overview) – outlines key timeframes, actions and guidance for working together to develop RLTPs and the NLTP.

TIMING

Programmes should be progressively optimised and tested between now and early 2015 as outlined on the NLTP timeline (A3 overview), and against the timeframes provided by your RTC.

All draft programmes should be loaded into TIO by November 2014.

Any activities seeking immediate funding approval must complete all fields with robust and accurate data.

Activities only seeking inclusion in the NLTP that may be funded at a later date, can complete a subset of information which includes project objectives, cash flow and assessment.

For more detailed information, including our planning and investment principles, updated investment assessment framework guidance and the business case approach, visit the Knowledge Base website (<https://www.pikb.co.nz/>).

You'll need to register to get notifications of updates.