

Independent Professional Advisors (IPA) Contract NO 17-286 - Offer of service

One Network Framework

Adviser details	
Company's name	JUST ADD LIME
Adviser's name	s 9(2)(a)
Adviser's contact details	s 9(2)(a) @justaddlime.co.nz
IPA category/subcategory	ENVIRONMENTAL AND SOCIAL RESPONSIBILITY

NZ Transport Agency details	
Name	Andrew McKillop
Contact details	Andrew.McKillop@nzta.govt.nz s 9(2)(a)
Cost Code and/or WBS Number	WBS80002276

APPENDICES

Appendices	
Purpose and background information	Refer to Annexure 1.
Scope of services	Refer to Annexure 1.
Programme	Refer to Annexure 1.
Methodology	Refer to Annexure 1.
Resources	Refer to Annexure 1.
Fee Estimate / Quote	Refer to Annexure 1.
Other Consultants, Other Consultants' insurance, personnel, equipment, facilities, and information supplied by the Client	Where applicable, these are listed in Annexure 1.

SIGNED for and on behalf of the NZ Transport Agency by

Signature: _____

Name: _____

Date: _____

SIGNED for and on behalf of the Consultant by

Signature: _____

Name: s 9(2)(a) _____

Signed form to be emailed by the advisor to IPA@nzta.govt.nz
 Contract number AND **WBS** number to be put on each invoice

Released under the Official Information Act 1982

ANNEXURE 1

Purpose and background information

This offer of service is to extend the engagement of the advisors on the One Network Framework project to the end of March 2021

Context

The NZ Transport Agency and LGNZ wish to enhance and develop the existing One Network Road Classification framework into a One Network framework that differentiates customer service levels for different classes of link and place, for land transport modes and significant customer types, for the short medium and long term so that it is a common and useful framework for transport operations, maintenance, renewal and improvement in a land use and place context.

The parties wish to enhance and develop the framework in collaboration with sector stakeholders and using existing bodies or stakeholder groups where possible to maximise relevance, alignment, utility, adoption and use.

Outcome Areas

The new ONF will provide a consistent language and framework whereby investors, elected members, managers, planners, engineers, operators and contractors will be able to improve practices to:

- 1) Consistently Describe Elements of the Transport System: *Provide a consistent way of describing elements of the transport system providing a common language across strategy, planning, operation and management activities.*
- 2) Deliver Customer and Community Centric Outcomes: *Ensure the drivers behind transport investment decisions can more readily be communicated to our customers in outcomes they understand.*
- 3) Ensure the Transport System is Fit-for-Use: *Manage the existing transport system to ensure it delivers the best-possible level of service to its customers.*
- 4) Close Level of Service Gaps by Improving the Transport System: *Choose the right projects to improve the transport system for the future and close the gap between current and expected customer levels of service.*
- 5) Provide Confidence in Program Investments and Trade-offs: *Provide customers, investors and decision makers a basis for consistently considering, prioritising and optimising land transport investment decisions locally and nationwide.*

Scope of services *

This Phase engagement is for the:

- 1) Provision of expertise to develop the Detailed Design for ONF.
- 2) Provision of communications and engagement expertise and support to the project as required
- 3) Oversight of the Movement and Place Classification workstream
- 4) Development of a detailed design for ONF Implementation and develop base use cases.
- 5) Conduct of a pilot programme to trial the Detailed Design concepts with a number of RCAs and development of a series of Case Studies associated with the trial sites
- 6) Development of user training and guidance tools in support of the framework

- 7) Oversight of the Tools and Technology workstream in conjunction with the SOaP workstream lead
- 8) Contribution to the technology requirements for the framework including liaison with technology providers on changes required to systems
- 9) Liaison with representatives of various Waka Kotahi divisions on the integration of ONF with other planning, design, operations, and investment frameworks.
- 10) Produce list of activities for deployment (to support Implementation Plan)
- 11) Communications and engagement support for the implementation of the framework to RCAs
- 12) Graphic Design to support the above.

Programme*

Our proposed programme is as follows:

- January 2021 – Completion of trials of classification framework and development of associated case studies.
- January 2021 – Completion of all associated documentation, including detailed design, user guidance, user toolset, communications collateral, website
- February/March 2021 – Implementation of Framework with the transport sector

Estimated Start and End Date *

Start	1 October 2020	End	31 March 2021
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Methodology*

Activities include:

1. Design ONF Network Classification System
 - Broaden current road classification to cover 'movement' of people and goods (across all transport modes).
 - Incorporate 'place' making function to broaden adoption across the planning-design-operate spectrum.
 - Consider relationship between 'network elements' and customer level of service statements.
 - Link the new classification framework with levels of service and performance measures.
 - Create a clear framework for communicating the importance of network elements to customers and adjacent community.
 - Design an easy way to navigate network elements and see the customer level of service, technical measures, targets and tactics assigned on each element. To inform the specification for a support tool (software) to be built to aid ONF use.
2. Design ONF Level of Service and Performance Monitoring Framework
 - Develop customer outcome measures for all strategic modal links and places.
 - Identify subset of strong KPM's that reflect investment efficiency (TIO/RAMM/CAS).
 - Create a greater customer focus and linking of service levels to operational tactics (cascading strategy).
 - Improve the existing customer level of service statements and associated technical measures used to track achievement.
 - Provide comparative reporting for all customer outcomes.
 - Embed into NZTA appraisal methodology.

- Integrate into the Investment Assessment Framework (IAF) and Business Case approach.
 - Operate at the element and network level.
 - Embedment in NLTP investment tools and other assessment frameworks..
3. Support project manager, to provide regular updates as required. Including:
 - Task management and progress reporting
 - Cost (actual and forecast)
 - Communication and engagement with stakeholders, planning, working with experts and delivery as agreed
 - Resourcing and resource management
 4. Engagement with ONF stakeholders
 - **Leadership:** Work with the project sponsor and REG programme manager to ensure that REG Governance Group is satisfied with progress and outcomes of the project.
 - **Design Team:** Conduct workshops, engage via phone/skype/email to co-design the ONF components
 - **Subject Matter Experts:** Engage and seek feedback from SME's on high-level design to get endorsement ahead of detailed design.
 5. Work to develop a common view of the ONF definition so that parties are aligned as soon as possible, and ensure that this view is reviewed and shared as the project progresses
 6. Work with the stakeholder groups to support their activity and ensure its contribution to project outcomes noting that many groups are comprised of volunteers who may only have sufficient capacity to guide or review project deliverables and artefacts and that third-party resource may be required to deliver on their guidance
 7. Work with established REG processes and resources used for engagement with the Governance Group, sector engagement and communications and propose change to these where required Reporting
 8. Provide routine reports to the REG programme director, project manager and governance group including weekly updates, and an in-depth report for each Governance Group meeting.

Assumptions

In undertaking this commission, it is assumed that the scope will be guided by the information provided by Waka Kotahi - The NZ Transport Agency

Deliverables

- 1) D1: One Network Framework Detailed Design (Artefacts and communication deck)
- 2) D2: Approach for Deployment (1-5 year) to feed the 2021 deployment of ONF.
- 3) Weekly email reports on progress, and an in-depth report for each Governance Group meeting.

The parties acknowledge that the project will be reviewed periodically to ensure that its goals remain relevant and achievable and that consequently there may be changes to the role and requirements of the project manager and the relevant commercial arrangements.

Deliverable/Milestone	Performance Standards	Due date
Detailed Design/Communications and Engagement	<ul style="list-style-type: none"> Produced Detailed Design requirements Develop final artefacts for Classification and LOS components Produce concept note (design brief) for any support tools Liaise with PM and Comms to build out guidance and communications material Develop Use Case template with 6-7 exemplars and manage build-out by SME's Communicate detailed design and deployment tasks to REG governance and seek endorsement 	31 January 2021

Resources*	
For this commission, additional resources beyond the Independent Professional Advisor are:	
s 9(2)(a)	Infrastructure Advisory
s 9(2)(a)	Social Sustainability
s 9(2)(a)	Communications and Design
s 9(2)(a)	Infrastructure Advisory
s 9(2)(a)	Infrastructure Advisory

Fee Estimate (excluding GST and disbursements)*							
Fees	s 9(2)(b)(ii)						
(Optional) The above Fees are apportioned as follows:							
	<table border="1"> <thead> <tr> <th>IPA Advisor</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>s 9(2)(b)(ii)</td> <td>\$</td> </tr> <tr> <td>\$</td> <td>s 9(2)(b)(ii)</td> </tr> </tbody> </table>	IPA Advisor	Other	s 9(2)(b)(ii)	\$	\$	s 9(2)(b)(ii)
IPA Advisor	Other						
s 9(2)(b)(ii)	\$						
\$	s 9(2)(b)(ii)						
1. Communications and Engagement and HLD Endorsement							
2. Detailed Design							
Expenses	Charged on an actual basis at cost. Estimated at s 9(2)(b)						
Total Charges	\$ s 9(2)(b) excluding GST						
Identify whether the Total Charges is an Estimate / Quote and the method that the Charges have been calculated	Estimate not to be exceeded without Client approval.						
Additional Information / assumptions: Disbursements are additional and will be passed on at cost.							