

TRANSPORT CROSS SERVICE REVIEW IMPLEMENTATION PROJECT PROGRESS REPORT

Report By: Director of Environment

Wards Affected

County-wide

Purpose

To inform Members of the further progress that has been made on implementing the recommendations of the Transport Cross Service Review.

Financial Implications

None as a result of this report. A budget of £150,000 has already been identified to cover the procurement and installation of Scheduling Software to improve the efficiency of Education and Social Care transport services and support the introduction of demand responsive public transport services. Funding for this budget comes from three Government grants through Education Post 16 Pathfinder project, Rural Bus Challenge Grant and Urban Bus Challenge Grant. The cost of procuring this software is expected to be within this budget and negotiations are underway with the preferred supplier to get the best deal for Herefordshire.

Considerations

1. A Cross Service Best Value Review of the transport services was undertaken by the Council to examine the scope for improving the services provided and considered the potential for closer co-ordination and integration. This Committee considered a Third Stage report for the review on 17th May 2002 outlining the key findings and recommendations from the review. This report identified a number of issues requiring further work and implementation as part of an improvement plan for the service that were endorsed by the Committee.
2. The recommendations of the Strategic Monitoring Committee were reported to the Cabinet at its meeting on 13th June 2002. Cabinet resolved that a Project Board be established to undertake the further work and oversee the implementation of the recommendations. Cabinet also endorsed a number of detailed actions for implementation by the Project Board.
3. A Project Board was established chaired by the Director of Environment and includes the Director of Education and Director of Social Care and Strategic Housing. The Lead Planner (Transportation) was nominated as the Project Manager for the project and a Project Team drawing membership from the three Directorates formed to undertake the detailed work.
4. Progress reports on the implementation of the recommendations of the Transport Cross Service Review were considered by this Committee at its meetings on the 10th February and 1st April 2003. The report considered on 1st April 2003 set a number

Further information on the subject of this report is available from Richard Ball, Lead Planner (Transportation)
on 01432 260965

of appropriate targets and milestones to be achieved during the implementation of the project. This report seeks to update Members on the current progress towards meeting these targets.

5. This Transport Cross Service Review Implementation Project seeks to implement improvements that will help the transport services currently provided by the Environment, Education and Social Care Directorates meet transport needs in a quality and cost effective way through better co-ordination and integration.
6. The project is continuing broadly in accordance with the original programme. However, it has been necessary to revise some of the target dates. The reasons for changes to targets/milestones are set out in detail below. However, the development of the Change Management Strategy has been deferred to take account of the need for further work to identify a coordinated IT solution, the procurement of Scheduling Software is progressing well but has taken longer than expected due to negotiations with the preferred supplier to ensure Herefordshire gets the best deal possible and the review of discretionary policies is due to be deferred until the outcome of a national review of school transport rules is completed.
7. The Government recently invited local authorities to submit bids for funding to establish a sustainable travel demonstration town. It was necessary for the Lead Planner (Transportation), the Project Manager for this project, to devote significant time to preparing the Council's bid for this new initiative which resulted in a reduction in resources available to progress the Transport Cross Service Review Implementation Project over recent months. This has resulted in some slippage in the project.
8. The following table identifies the original milestones and targets and, where appropriate, revised targets that have been adopted to guide the implementation of the project. Further details of what has been achieved so far and the reasons for the changes in targets are presented below.

Key Targets / Milestones	Original Target / Milestone	Status / Revised Target
Develop and Implement Improved Co-ordination and Integration		
1. Potential IT systems examined and demonstrations held	30/5/03	Achieved / Further work required
2. Change Management Strategy Developed	1/8/03	1/6/04
3. Change Management Strategy Approved for Implementation	19/12/03	1/8/04
Identify and Procure Scheduling Software		
1. Potential IT systems examined and demonstrations held	30/5/03	Achieved
2. Budget Approved to procure appropriate software	30/6/03	Achieved

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3. Software Installed	1/10/03	1/3/04
3. Commence Review of Contracts	28/11/03	1/4/04
Review Discretionary Policies		
1. Draft Revised Policies Considered by Cabinet to approve for consultation	31/7/03	On hold
2. Publish Revised Policy	30/7/04	On hold
3. Revised Policy Takes Effect	05/09/05	On hold
Pilot Projects for Staggered Opening Times for education and social care establishments		
1. Identify suitable area for trial	28/2/03 (achieved)	Achieved
2. Complete desk top study prior to trial implementation	31/7/03	Achieved / live trial dependent upon provision of scheduling software
Brief LEA Governors on School Transport		
1. Briefing held for Governors	30/4/03	Achieved

Commentary

Develop and Implement Improved Co-ordination and Integration

9. The Project Team reviewed a range of software in relation to improving coordination by sharing operational information and the selection of software to improve the efficiency of scheduling. It had been hoped that a single system could have been found to meet both these requirements for the service. Unfortunately, no single system is currently available that is capable of providing all the functions required effectively. In recognition of the available resources, it was therefore decided to take forward the procurement of appropriate scheduling software first. It is anticipated that the Project Team will return to consider the potential of a separate system to coordinate other parts of the work of the service once the procurement of scheduling software has been completed. The target dates for the remaining milestones for this element of the project have therefore been deferred.
10. In September, the Social Care Transport Team relocated to the Education and Conference Centre. This co-location with the Education Transport team will further strengthen links and make joint working easier. In particular, it will enable better consultation, improve access to operational data, help to avoid duplication of effort and contribute to building a team effort for the delivery of the service.

Identify and Procure Scheduling Software

11. Good progress is being made with this element of the project to procure specialist software to improve the efficiency of Education and Social Care transport services and support the introduction of innovative demand responsive public transport services. A preferred supplier has been selected and negotiations are currently underway to procure the software.
12. This element of the project has taken longer than anticipated due to detailed technical negotiations to ensure the proposed system fully meets the requirements of the service and is compatible with Council IT systems. Contract documentation has also been considered by Legal Services to ensure the Council's interests are protected. Detailed negotiations are underway to ensure Herefordshire gets the best deal possible. The remaining target dates have been revised to reflect the work that has been undertaken. These also take account of the likely time required to install and bring the particular system that has been selected into operation.

Review Discretionary Policies

13. The Education Scrutiny Committee has considered the issue of discretionary transport provision at its meetings in July and September. However, in September, the Government announced a national review of school transport rules and published an action plan for consultation. The Government also announced new funding for the development of school travel plans and a grant scheme for schools to help implement measures such as new cycle parking. The Environment and Education Directorates are currently considering the consultation documents and the relevant Cabinet Member is currently considering whether to put this element of the Transport Cross Service Review Implementation Project on hold until the results of the Government's review are known.

Pilot Projects for Staggered Opening Times for education and social care establishments

14. A desk study was undertaken jointly between Social Care and Special Educational Needs transport in accordance with the project programme. This examined the potential for opening times to be staggered at two sites, the St Owens Centre and Blackmarston School, and included consultation with staff at the establishments and with parents or carers. The consultation with parents and carers will be helpful in ensuring that any changes that are introduced ensure that the service to users continues to meet their needs and, if possible, is improved. The study confirmed the suggestion that the staggering of opening times for such establishments could allow vehicles to be used more efficiently and prevent duplication. However, the inter-related nature of contracts for provision of such transport means that the implementation of such a scheme would be very complicated and without careful planning could have unforeseen knock-on effects on other contracts. The Project Team concluded that the proposed Scheduling Software would be required prior to the implementation of any scheme. This would allow for a variety of "what if" scenarios to be tested using the software prior to the implementation of a suitable scheme. Whilst this element of the project is complete, it is proposed to develop a live pilot when the Scheduling Software is operational. In addition, the study identified the need for additional resources for Health and Safety training for escorts and drivers. A new Health and Safety Officer (Transport) was appointed on 9th September 2003 and is being funded jointly by Social Care and Education Directorates.

Brief LEA Governors on School Transport

15. Briefings were held for School Governors and coordinated with briefings organised to highlight recent changes to local management of schools. These briefings highlighted the key transport issues and made clear the potentially negative implications for the LEA transport budget that can arise as a result of changes that schools may introduce to their opening hours. The importance of schools discussing any proposed changes with the LEA to minimise this impact was stressed.

Conclusion

16. The above report highlights the good progress that has been made since April on implementing the recommendations of the Transport Cross Service Review. The project continues to demonstrate the success of close working relationships between the Environment, Education and Social Care Directorates. The introduction of Scheduling Software will bring significant benefits for the service and improve efficiency. Attached at Appendix 1 is a copy of the current full programme for the project. A further progress report will be submitted in six months time.

RECOMMENDATION

THAT the progress with the implementation of the Transport Cross Service Review be noted.

BACKGROUND PAPERS

None

APPENDIX 1 – TRANSPORT CROSS SERVICE REVIEW IMPLEMENTATION PROJECT PROGRAMME

ID	Task Name	Start	Finish	2003				2004				2005			
				Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
127	Transport Cross Service Review Implementation Project	Tue 26/11/02	Mon 05/09/05												
128	Develop and implement improved co-ordination and integration	Tue 26/11/02	Wed 03/08/05												
129	Examine existing models of co-ordination and integration	Tue 26/11/02	Thu 01/04/04												
130	Examine potential IT systems	Tue 26/11/02	Fri 30/05/03												
131	Review Transport Co-ordination Study results	Mon 06/01/03	Thu 01/04/04												
132	Consider the final report to examine opportunities for improving the service	Mon 06/01/03	Thu 01/04/04												
133	Further Examination of IT Systems	Mon 01/03/04	Tue 01/06/04												
134	Develop Change Management Strategy	Fri 02/04/04	Wed 02/06/04												
135	Seek approval for model for co-ordination and integration	Mon 02/08/04	Mon 02/08/04												
136	Commence implementation of Change Management Strategy	Wed 01/09/04	Wed 03/08/05												
137	Identify and Procure Scheduling Software	Tue 26/11/02	Mon 23/05/05												
138	Consider IT Support Requirements	Tue 26/11/02	Mon 03/02/03												
139	Approve budget for IT Support	Tue 04/02/03	Tue 04/02/03												
140	Examine available software and develop specification	Mon 10/02/03	Fri 30/05/03												
141	Approval for procurement of software	Mon 02/06/03	Fri 27/06/03												
142	Procure and install software	Mon 30/06/03	Mon 01/03/04												
143	Undertake staff training	Tue 02/03/04	Fri 30/04/04												
144	Commence review of contracts	Mon 03/05/04	Mon 23/05/05												
145	Review Discretionary Policies	Thu 02/01/03	Mon 05/09/05												
146	Examine costs and benefits of existing policies in Education and Public Transport	Thu 02/01/03	Fri 28/02/03												
147	Review approaches taken by other authorities	Mon 03/03/03	Thu 08/05/03												
148	Proposed to be On Hold Pending Outcome of Government Review	Tue 30/09/03	Tue 30/09/03												
149	<i>Consult on revised policy proposals (on hold)</i>	Wed 01/10/03	Fri 28/11/03												
150	<i>Consider responses and secure approval for revised policy (on hold)</i>	Mon 01/12/03	Fri 26/03/04												
151	<i>Publish revised policy (on hold)</i>	Fri 30/07/04	Fri 30/07/04												
152	<i>Revised policy takes effect (on hold)</i>	Mon 05/09/05	Mon 05/09/05												
153	Pilot projects for staggered opening times for schools and social services	Mon 06/01/03	Mon 24/01/05												
154	Identify suitable areas for pilot projects	Mon 06/01/03	Fri 28/02/03												
155	Undertake Desktop Study of Implications	Mon 31/03/03	Tue 24/06/03												
156	Contact and secure agreement of relevant establishments	Wed 03/03/04	Tue 04/05/04												
157	Agree revised transport services and opening times	Wed 05/05/04	Mon 02/08/04												
158	Undertake Monitoring of Initial Contracts	Tue 03/06/04	Thu 25/11/04												
159	Prepare report detailing outcomes	Fri 26/11/04	Mon 24/01/05												
160	Develop policy and practice regarding developer contributions	Tue 26/11/02	Wed 31/03/04												
161	Raise issue at the Development Impact Group	Tue 26/11/02	Wed 31/03/04												
162	Include transport in SPC for Planning Obligations	Tue 26/11/02	Wed 31/03/04												
163	Brief LEA Governors on school transport	Tue 26/11/02	Wed 30/04/03												
164	Prepare guidance info for Governors	Tue 26/11/02	Fri 31/01/03												
165	Undertake annual briefing for Governors in relation to LEA transport policies	Mon 03/02/03	Wed 30/04/03												
166	Reporting on Progress	Mon 10/02/03	Mon 13/10/03												
167	Report to Strategic Monitoring Committee February 2003	Mon 10/02/03	Mon 10/02/03												
168	Report to Strategic Monitoring Committee April 2003	Tue 01/04/03	Tue 01/04/03												
169	Report to Strategic Monitoring Committee October 2003	Mon 13/10/03	Mon 13/10/03												