

## Appendix A

# Project Mandate

<b>Project Name:</b>	<b>Passenger Transport Review</b>		
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**Purpose:**

To develop and implement policy and operational changes that will improve the efficiency and quality of transport services provided to all residents, taking a Total Place approach through the Local Strategic Partnership.

For the Council, the main focus will be Home-to-School and Adult Social Care transport along with other transport-related activity. [Subsidised Bus Routes to be included as of Sept 09]

**Responsible authority**

This project is accountable to the Central Bedfordshire Council Transformation Board. The governance of the project should also include:

- The Adult Social Care, Health and Housing Thematic Group of the Local Strategic Partnership from which a Partners Reference Group will be established.
- The Children's Trust Joint Commissioning Group
- A CBMT Joint Scrutiny Task Force recognising the breadth of interest from all five Overview and Scrutiny Committees.

Within Central Bedfordshire Council responsibility for the services are with three Directorates: Children's Families and Learning, Social Care, Health and Housing and Sustainable Communities.

- The policy changes and equalities impact are within the remit of CF&L and SCH&H, along with commissioning and contract management;
- Sustainable Communities leads on addressing the environmental impact of CF&L and SCH&H proposals, licensing, contract management and provision of transport, developing the Central Bedfordshire Transport Plan, and reviewing in-house Passenger Transport business processes, the Central Bedfordshire fleet and depot requirements.

**Background**

1. A review of passenger transport will clarify the current status of policies and service provision that transferred to Central Bedfordshire Council on 1 April 2009. In June 2009 the Transformation Board agreed in principle to allocate £250,000 'invest to save' funding towards transforming passenger transport. Since then soundings have been taken from senior officers and external passenger transport specialists. The recommendation is to:
  - divide the project into two parts: (1) a review stage which produces a robust business plan and a delivery plan; and (2) an implementation stage; and
  - appoint a passenger transport consultancy to conduct the review (see Methods below).
2. Central Bedfordshire Council provides school transport for 8,500 pupils and transport for adults receiving social care. The annual budget is approximately £8.3 million. Informal benchmarking suggests that this level of expenditure is high and that significant reductions and service improvements could be achieved through a comprehensive review of policy and business processes.
3. Four directorates are involved in service provision. The commissioning directorates are 'Children, Families and Learning' (CFL) with a budget of £7.9 million a year and Social Care Health and Housing (SCHH) with a budget of £400 thousand a year. These two directorates provide or commission transport themselves (e.g. dial-a-ride, and youth transport). The bulk of this funding passes through 'Sustainable Communities' (SC) which provides or arranges the transport as set out in annual Service Level Agreements (SLAs) and works with the corporate procurement team in 'Corporate Resources' (CR). Passenger Transport is one of the services prioritised by procurement for a Category

Review. The ICT division of CR is currently engaged in improving IT systems for passenger transport as part of the process of disaggregation from county systems. (Business Transformation has a role in supporting this review and in liaising with customers once the review is complete.)

4. Working together a more comprehensive review can be achieved. Clearly the CF&L and SCHH policy reviews are primary yet it is imperative that SC is involved as policy decisions would make a significant impact on the environment and services provided or supported by Sustainable Communities. For example:
  - Public Transport - decisions on home-to-school routes could impact on how public transport is subsidised.
  - Impact on traffic levels near schools.
  - Road Safety improvements on routes to school
  - Passenger Transport Team - Business Process Analysis and ICT solutions
  - Fleet Management
  - Requirements of a new Depot
  - Sustainable transport policies - different/better public or school transport; types of vehicles/fuel used , route planning etc
  - Taxi and Private Hire Licensing policies may need to be reviewed e.g. to include more rigorous safeguarding criteria.
5. The nature of transport is that a change in one service area will impact on another in terms of client services, costs or the local environment – it is better to look at transport services as a whole. Partners such as the NHS should be invited to have their transport services included within the scope of this project along with other partners who may want to be involved in the project.

#### **Project objectives**

1. Deliver a robust Business Case and Improvement Programme for a more efficient passenger transport service equal to or better than comparable services of other local authorities and their partners.
2. Implement certain improvements and savings quickly (before 10 May 2010) to show the review is underway and delivering.
3. To be positioned for the delivery of a comprehensive, longer term, improvement programme starting in May 2010 (Phase 2).

#### **Scope**

The interdependencies and potential impact of a passenger transport review are wide and varied (e.g. from human rights to CO2 emissions). Therefore the scope tolerances are broad and inclusive. Specialist input from experienced Passenger Transport Consultants is recommended. The project outcomes below are to include recommendations and implementation plans.

#### **Project Outcomes**

1. Proposed CF&L Transport Policies that are aligned to business priorities, legislation, national best practice and recent test cases, particularly eligibility criteria for School Transport
2. Proposed Transport Policies for SCH&H that are aligned to business priorities, legislation and national best practice, particularly the 'personalisation' agenda
3. Proposed Transport Policies for partners who wish to have their services included in the scope of this project.
4. Business Process Review of Allocations and Route Planning (including ICT disaggregation)
5. Review of Procurement and Contract Management of all Central Bedfordshire Council's transport related activity.
6. Strategic Review of Central Bedfordshire Council Fleet including local market analysis

7. Overall Financial Review
8. Overall Health and Safety Review
9. Overall Quality Review
10. Road Safety Schemes and Safe Routes to School – assessment of potential schemes that could mitigate the need for dedicated school transport and where feasible implement these schemes
11. Public Transport Impact Assessment of proposed policy changes
12. Environmental Impact Assessment of proposed policy changes (e.g. possible increased traffic) in the context of the Council's sustainable transport policies
13. The taxi and private hire sector - procurement and licensing
14. Identification of early savings and improvements to service planning and delivery.
15. Successful consultation with members, customers, partners and contractors resulting in stronger relationships with these key stakeholders

### **Methods**

Building on work already underway, commission a Passenger Transport Consultancy to work with and support Central Bedfordshire Council colleagues and partner organisations. This would provide, for example,

- specialist expertise and advice for those areas where this is required and external validation of the options already under consideration;
- knowledge of how similar local authorities have modernised and improved their passenger transport services;
- information and analysis, e.g. environmental and equality impact assessments, local market analysis, traffic modelling, population trends etc.
- experience and a quicker, more robust and inclusive outcome.

### **Benefits**

1. Central Bedfordshire Council to have a 'joined up' set of passenger transport policies and practices (This may be extended to include partners' transport policies and services.)
2. Achievement of significant efficiencies and economies in the overall cost of the services, ensuring service delivery is improved
3. Improvements to the safeguarding of service users (which include vulnerable adults and children)
4. Completion of a Procurement Category Review
5. Environmental benefits from specific parts of the project (environmental benefit of the whole project would need to be determined over the longer term)

### **Constraints**

1. Children's Families and Learning are due to report to the Executive on 10 May
2. Procurement – The Head of Procurement is advising this project and is seeking to appoint a consultant through an existing framework agreement.
3. Existing contracts and other commitments (e.g. transport operators and road safety schemes)
4. Tight timeframe for project due to urgent need for disaggregation and review
5. Clients' "Legitimate Expectation"

### **Interfaces**

The comprehensive scope of this project ensures that four directorates are working closely together and that the interdependencies and potential impact on services are a key discussion point throughout the project. Portfolio holders will also be updated and involved in the project.

Partners, customers, contractors, members of staff and other key stakeholders will be involved, advised and consulted as and when required (see project outline attached). Customers have already been advised that the Home to School Transport policies are

under review.

The requirements of a new depot cannot be determined before the policy and fleet reviews have been completed.

### Customer quality expectations

Customers expect high quality transport for the children and vulnerable adults in their care and that personal data is secure. Their "legitimate expectation" will be an important consideration..

### Outline Business Case

The project supports existing business strategies and programmes and is expected to deliver significant savings of at least 2:1 on the 'invest to save' allocation. Indeed, the experiences of other local authorities that have reviewed their passenger transport services in this way suggest that the savings could be in excess of 2:1. The project will deliver a robust Business Case for transforming this service over the next few years and will identify and implement those changes that can achieve savings and efficiencies quickly within the time frame of this first phase.

The Business Case will:

- include evidence-based recommendations on how to achieve efficiencies and savings through changing policy, business processes and procurement;
- provide an estimate of the savings that transformation could achieve; and
- be a key component to the Project Initiation Document for securing the remaining 'invest to save' funding which would be invested in delivering the change programme.

### Project tolerances

**Cost:** The Transformation Board agreed in principle to provide up to £250,000 from the 'invest to save' budget. At this stage the Project is requesting up to £100,000, which is expected to be recouped from 'quick wins' and from the implementation stage that follows this project. The estimated cost of the consultant services will be confirmed through the procurement process. The project will require a 'project office' to include project management, support for an operational project board and a robust communications plan.

There might be other early opportunities within this project to invest additional 'invest to save' funding and these would be subject to Transformation Board Approval.

**Time:** The consultancy should finish its review by January 2010, subject to the time frame of the procurement process. CF&L are required to report to the Executive 4 May 2010. Some elements of the project might be implemented earlier than May subject to approval of the project board or other relevant body.

**Scope:** The interdependencies and wide impact of change are such that the scope must be broad and include as a minimum the 4 directorates involved in shaping service provision. Customer Services (Business Transformation Directorate) will need to be kept informed of consultations and changes in entitlement. Other partners like the NHS will be invited to include their transport services within the scope, whilst maintaining the momentum of the review of CBC services.

**Quality:** The aim is to develop policies and services that meet the standards of national best practice. As a PRINCE2 project the customer acceptance criteria will not be changed without following due process. Quality standards will be set and enforced as part of all contracts. The Programme Management Office within Business Transformation was asked to perform the Quality Assurance role. This project requires a

'project office' – see costs above.

**Reference to any associated documents or products**

Department for Children, Schools and Families, Department for Transport, The national Youth Agency, **Transport Guidance: Supporting Access to Positive Activities**, 2009  
Central Bedfordshire, **Draft Procurement Policy** 2009  
Bedfordshire County Council, **School and College Transport Policies**, September 2005  
Audit Commission, **Going Places: taking people to and from education, social services and health care**, 2001  
Audit Commission, **Improving Mainstream Home-to-School Transport: Practical Handbook for Managers**, 2001

**An indication of who are to be the Executive and Project Manager**

Executive: Sylvia Gibson, Assistant Director Policy CF&L; deputised by Sue Reed Head of Service  
Project Manager: Sustainable Communities - initially Louise Miller, Interim Programme Manager

**The customer, user and any other interested parties.**

Parents & Carers & Passengers

Schools

Children Families & Learning & Social Care Health and Housing are customers of Sustainable Communities Passenger Transport Team.

Customer Service Centres require up to date and accurate information.

LSP Partners

Existing Contractors