

GREATER MANCHESTER INTEGRATED TRANSPORT AUTHORITY
REPORT FOR RESOLUTION / INFORMATION

COMMITTEE: Policy and Resources
DATE: 22nd January 2010
SUBJECT: Flexible Transport Review Action Plan
REPORT OF: Deputy Clerk to the Authority

PURPOSE OF REPORT

To remind Members of the Policy and Resources Committee of the findings and recommendations of the Flexible Transport Review, and to secure Members' endorsement for an Action Plan that will fulfil the agreed recommendations.

RECOMMENDATIONS

Members are recommended to:

1. Note, comment and approve the Action Plan, and the specific actions as outlined in Section 3 of this report.
2. Confirm the provision of a countywide Ring and Ride service by GMATL for people who have difficulty using conventional public transport to complement similar services provided by other operators, such as community transport organisations.
3. Receive a further report outlining changes to the membership of GMATL, bringing forward details regarding a Ring and Ride pilot scheme and other arrangements.

BACKGROUND DOCUMENTS

Report on Flexible Transport Review, Policy and Resources Committee, 20 November 2009. All other background documents relating to the work of the Flexible Transport Review can be found on file in Room 308.

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1. Introduction

- 1.1 As Members will recall from the last meeting of the Policy and Resources Committee, the purpose of this Review was to examine the range of Flexible Transport services provided by the Authority.
- 1.2 Over time the Authority and GMPTE have developed a diverse range of innovative measures designed to enhance connectivity for people who find it difficult to use conventional public transport services. Collectively termed Flexible Transport services, they include Ring and Ride and Local Link services, various grant schemes and support for the Community Transport sector. The key finding of the Review was that there is a need to better coordinate these services, hence the Review report set out a number of key actions and concluded that the range of Flexible Transport services should also be kept under review in the LTP3 process.
- 1.3 Policy and Resources Committee approved the Flexible Transport Review Panel's report and recommendations, but members did ask the following be taken into account:
 - ensure that exceptions are made for hospital trips, journeys to accessible railways stations and the nearest town centre, in cases where these exceed the distance criteria that will be trialled in the Ring and Ride pilot scheme.
 - ensure that the new governance arrangements proposed for GMATL will be legal robust.

2. Purpose of the Action Plan

- 2.1 At its meeting on 20 November, the Policy and Resources Committee endorsed the Review Panel recommendations for a series of actions be undertaken by the relevant organisations to improve the performance of a number of flexible transport services funded by the Authority.
- 2.2 There is clearly a continuing need for an integrated, countywide Ring and Ride service as there is no equivalent service capable of meeting the needs of Ring and Ride users. However, many of the recommended actions are aimed at improving the governance and the operation of GMATL / Ring and Ride. Hence, the decision was taken to reform the current governance structure of GMATT and GMATL, such that there was a clearer and more accountable set of relationships between the Authority, the Executive and GMATL.
- 2.3 The GMPTA originally established a charitable trust (the Greater Manchester Accessible Transport Trust) in 1991. The aim of the Trust was to make grants to secure the provision of transport for people who have difficulty using conventional public transport. However, with the exception of some small grants made to Community Transport

organisations, GMATT has only ever funded GMATL (Ring and Ride). This particular structure was adopted because of concerns over legal powers, which are no longer valid. The most straightforward way of achieving a clearer and accountable set of relationships would be for a Grant Agreement to be made directly between GMPTE and GMATL (subject to approval by ITA), widen the membership of the GMATL Board, and make any necessary associated changes to secure this governance reform.

- 2.4 Further, it is proposed that the Authority approve the Grant Agreement each year, following advice from GMPTE which would undertake monitoring of the Agreement and maintain a regular dialogue with GMATL officers. To ensure consistency, it may be useful to establish regular, liaison arrangements between key officers of the PTE and GMATL. It is also suggested that the Authority receive a presentation and annual report from the GMATL Chief Executive each year at the Authority meeting where the Grant Agreement is to be discussed and agreed, in order to ensure that the wider membership of the Authority is provided with an opportunity to scrutinise the activities of GMATL. The Grant Agreement will also provide GMATL and its Board with a clear set of objectives and priorities that the ITA expects it to achieve. A draft Agreement is attached for information as Appendix 2. A final version of a Grant Agreement will be brought to the next meeting of this Committee for approval.
- 2.5 The Review Panel also wanted to see significant improvements to the operational performance of Ring and Ride's core service. These included making improvements to the booking service, better customer care and liaison mechanisms to ensure the service is continually challenged to improve by users experience. The trial of a revised set of distance criteria was also approved. In order to progress these operational improvements, discussions between ITA and PTE officers and GMATL are ongoing. In the first instance it is proposed to establish a pilot project to test these enhancements in practice. The pilot will be designed to determine how well the new arrangements can better meet passenger needs before they are extended to other GMATL depots. An outline of the proposed scheme can be found at Appendix 1, and further planning work is currently being undertaken on the pilot scheme to identify the potential risks and opportunities. A specified pilot scheme proposal will be brought back to the next meeting of this Committee in March for members' endorsement
- 2.5 Review Panel members were also keen to see the GMPTE undertake some work to refine its successful Demand Responsive Transport services, and they also endorsed the reforms of the administration of grants identified by the Mott Macdonald review. It was also recognised that all forms of Flexible Transport should be kept under review and where possible be better co-ordinated, and to this extent a key element of the next Local Transport Plan will be to identify the appropriate roles for Flexible Transport services.

3 Action Plan

3.1 Actions for the GMPTE will include:

1. Working with GMITA officers to reform the current governance and funding arrangements relating to Ring and Ride services, subject to legal advice on ensuring the proposed governance arrangements will provide the Authority with robust influence over Ring and Ride services over the long term.
2. Undertake a detailed review of the existing net cost base of GMATL for providing the existing level of service and appraise the financial implications for implementing the pilot and other initiatives set out in the report. This will include the appraisal of any further opportunities and risks associated with the existing and potential future operating models.
3. Contribute to the development of GMATL detailed three year business (and financial) plan that incorporate the above.
4. Working with GMATL on developing a Grant Agreement for 2010 / 11 which will more closely define the level, form and the performance of service required in exchange for the annual grant. A final version will be brought to a meeting of the Authority for approval.
5. To implement the reforms to the grant regime recommended by Mott Macdonald and endorsed by this committee in a timely but sensitive manner, such that individuals and groups that have been long term beneficiaries of grants are advised well in advance of any particular consequences arising from this reform and provided with appropriate advice and support.
6. Keeping the various modes of Flexible Transport provision under review, and consider the role of each within the overall context and transport strategy to be established by the Third Local Transport Plan.
7. To inform Bus Network and GMPTE Services Committee members and the Flexible Transport Review panel of the ongoing efforts GMPTE officers make to get third party funding support for its Demand Responsive Transport schemes.
8. To inform Bus Network and GMPTE Services Committee members and the Flexible Transport Review panel on how the GMPTE ensures maximum value for money on its Local Link (taxi) contracts.

3.2 Actions for GMATL will include:

1. Facilitating the process to amend and widen the membership of GMATL Board to include representation and expertise from, for example, an AGMA Social Services Director; an appropriate GM PCT representative; and a representative from the voluntary or community sector; and potentially a user representative. Therefore it is proposed that the GMATL Board Chair write to AGMA Health Commission, to North West Ambulance Service, to the GM Association of Social Service Directors to invite representation. A further report will be brought forward confirming membership proposals and detailing GMATA's relationship with GMATL.
2. Developing a continuous consultation and feedback system with current and potential Ring and Ride users and relevant organisations. This system can help ensure that the service is consistently challenged by the experience of users to improve. Reinvigorating the current local (depot) liaison meetings will also help meet this goal, particularly if key clients are invited to attend and contribute.
3. In terms of operational changes described in Section 2.4, GMATL will pilot these arrangements in a manner to be determined by GMATL, ITA and PTE Officers and agreed by this Committee at its next meeting. These changes will include a new trip length criteria, such that the existing (municipal) boundaries be disregarded but a new maximum journey length be limited to, for example, local journeys of 6 miles, except in cases of hospital trips, journeys to the nearest accessible railway station and the nearest town centre (where this is more than 6 miles). GMATL will inform current and potential users of Ring and Ride, as well as local Councillors, MPs and other key stakeholders of these changes well beforehand. An outline of the operational modifications to be piloted can be found at Appendix 1
4. Improve and extend the hours of the booking system.
5. The GMATL Chief Executive to attend a meeting of the Authority to present an annual update on GMATL activity and take questions from members.
6. GMATL to provide service performance information to the GMPTE such that it can be reported at regular intervals along with Local Link / DRT services to the Bus Network and GMPTE Services Committee.

3.3 Actions for GMITA will include to:

1. Keep all modes of flexible transport under review throughout the forthcoming Local Transport Plan process
2. Ensure that the performance of all the various forms of flexible transport, including Ring and Ride services, is reported to and scrutinised by the Bus Network and GMPTE Services Committee at regular intervals.
3. Receive an annual presentation and report from the Chief Executive of GMATL.

4. Timescales

- 4.1 It is proposed that the governance changes to GMATL be undertaken such that the new arrangements are in place for the start of the next municipal year (commencing 19 June 2010).
- 4.2 The operational improvements to Ring and Ride services, including the pilot scheme to test the new arrangements should commence as soon as practicable after the March meeting of this Committee. Officers will bring forward further details of the pilot proposals to this Committee for approval prior to implementation. The pilot will run for an agreed number of months, and a full analysis of it will be reported to the Authority prior to any further extension to other areas in Greater Manchester.
- 4.3 The financial review and the development of the three year business plan, as set out in section 3.1, will be undertaken during quarter 4 2009/10.
- 4.4 Changes to the administration and operation of the various grant regimes should be undertaken sensitively and in a phased basis, such that any negative impacts on individuals and groups that have been long term beneficiaries of grants are minimised.

5. Recommendations

- 5.1 A full set of recommendations can be found on the front page of this report.

Stephen Clerk
Deputy Clerk to the Authority

Appendix 1

Draft proposal for the Ring and Ride Pilot - Flexible Transport Review

| Proposal | Timescale | Customer Focus | Resource | Comment |
|--|------------------|--|---|---|
| <ul style="list-style-type: none"> ▪ Same day booking. Booking 1 hour before journey and up to 7 days in advance. | ASAP | Passengers have more flexibility in planning journeys | Nil | |
| <ul style="list-style-type: none"> ▪ Call centre opening for R&R (0800 to 1600) | April 2010 | Booking window open longer, enabling passengers greater opportunity to book journeys | GMATL has precise costings | Additional staff resources |
| <ul style="list-style-type: none"> ▪ Local service criteria (eg 5 mile radius from users) | April 2010 | Short journeys, reduces dead mileage, making more vehicles available for passengers | Publicity and promotional costs | Analysis on exact distance now being carried out, possibly 5 miles. Services will link to accessible public transport interchanges, corridors, et al. No restriction on journeys for hospital appointments. |
| <ul style="list-style-type: none"> ▪ Web Booking | Summer 2010 | 24 hour booking opportunity | Funded via ICMA | |
| <ul style="list-style-type: none"> ▪ Call centre location | April 2010 | Improved booking service | Funded via BSOG, GMATL development fund | Current call centre at capacity for DRT Local Link. R&R business plan to cluster depots resulting in savings on buildings and staff. Possible training lab funded via ICMA. |

**GRANT AGREEMENT - SERVICE SPECIFICATION AND OUTPUTS
2010 - 11**

Outputs for the delivery of Ring and Ride services throughout Greater Manchester.

The service is provided by Greater Manchester Accessible Transport Limited (GMATL), through funding from Greater Manchester Integrated Transport Authority (GMITA).

Ring and Ride outputs

1. The Service should be a fully wheelchair accessible minibus service and available to all residents of Greater Manchester who experience mobility problems, both permanent and temporary, long term and short term and who for a number of reasons find it difficult to use conventional public transport services. Due to constraints on space it may not always be possible to carry more than 1 wheelchair at a time; however, all efforts will be made to accommodate all passenger needs.
2. The Service should provide journey opportunities for individuals but in the event of a number of people wishing to travel to the same or similar destinations, these may be scheduled as multi-occupancy booking.
3. The service should be provided, at a minimum, between 0800 and 2245, Monday to Saturday and 08.15 to 22.10 on Sundays excluding Bank Holidays. Any changes to the operating times will be by mutual consent between GMPTE officers and GMATL management.
4. Booking facilities should be available by telephone (local rate), at a minimum, between 0930 and 1245, seven days a week, excluding Bank Holidays. Booking, scheduling and dispatch (BSD) facilities at the Manchester depot will be extended to 0800 to 1600. It is anticipated that the BSD programme at the Manchester depot will be rolled out across the county in accordance with the GMATL Business Plan.
5. All users of the service must be registered as members and eligible to use the service, excluding accompanying persons. All passengers will be asked upon registration to agree to be contacted for Research and Intelligence purposes. The Service will operate under Section 19 permit legislation, until such time it is determined otherwise.
6. The service provider will identify and deploy the vehicle, driver, depot facilities and support requirements and scheduling resources necessary to provide the service specified at all times. Where possible shift change over should be smooth ensuring a seamless service for passengers.
7. Fare levels and concessionary rates will be determined by GMITA/E in agreement with Directors of GMATL, with fares revenue **being collected and retained** by GMATL. Fares should reflect the premium nature of the service provided. Fares will be reviewed at the same time as the GMPTE funded Demand Responsive Transport Local Link

services. Information should be supplied annually to GMPTE on revenue generated from fares.

8. GMPTE and GMATL officers shall meet at least once a quarter throughout the year to ensure the service specification and outputs set out in this document are delivered. A special finance meeting shall take place each September as set out in Section 13 of this report. All meetings will be facilitated by GMPTE.

All outputs and indicators apply to both the core Ring and Ride, Cross Boundary Services and any other services funded via grant from GMITA.

9. **Key Performance Indicator(s) (KPI) and Quality Indicators.** Each year, subject to approval, GMATL will agree with GMPTE the following:
 - Quarterly targets for any required KPI;
 - Key actions to deliver KPI targets;
 - Procedures for reporting progress in meeting KPI targets

(a) For 2010/11, KPI requirements include the Cost per Ring and Ride Trip.

(b) For 2010/11, KPI requirements include the Cost per Ring and Ride Cross Boundary Trip.

GMATL, subject to approval, will provide the following **Quality Indicators**:

- Customer Service to include; qualitative passenger satisfaction levels by an annual survey
- Reliability levels
- Cleanliness of vehicles to a specified high standard
- Training and monitoring of drivers to present good levels of customer care, inclusive of smart appearance and conduct, including good standards of driving
- Ease of booking, staff attitude and time taken to answer calls
- Customer complaints / correspondence
- Logistic and demographic indicators (Age, Gender, Ethnicity, Disability, Mobility (walking frame etc), Wheelchair use, Trip Purpose, Cancellations, Refusals)

All indicators are subject to monitoring and evaluation as set out in Section 16.

10. **Development objectives.** Development objectives, to be agreed between GMATL and GMPTE, subject to approval by GMITA, will be determined each year or more frequently if it is considered expedient to do so.

For 2010/11, development objectives include the following:

- i. Continue to develop and promote additional journey opportunities for people wishing to cross standard neighbouring district boundaries for the service, recognizing changes recommended by the FTR
- ii. Improve the ability of service users to contact the service; by improvements to booking hours, communication methods and technology, inclusive of making alternative formats available such as Braille and Text phones

- iii. Improve communication methods with those passengers who encounter speech and visual problems
 - iv. Further development of the computer based booking, scheduling and dispatch capacity, inclusive of Web Booking in partnership with GMPTE
 - v. Continue to work in partnership with GMITA/E in delivering the equality, flexible transport and integrated social needs strategies.
 - vi. Promote the service to groups under represented as registered users and develop a new application form that includes permission for passengers to comply with R&I surveys
 - vii. Identify training and development needs for all staff relating directly to the delivery of Ring and Ride services inclusive of Investors in Peoples (IIP) programme
 - viii. Work with GMPTE and partners in the delivery of outputs secured from external funding streams, for example, EU Interreg, ICMA project.
 - ix. Ensure the GMATL Business Plan directly links to the service specifications and outputs as set out in this document
11. **Additional conditions.** Additional conditions to be met by GMATL will include the following:
- All staff that drive company vehicles must be appropriately licensed and have enhanced CRB clearance, and MiDAS accreditation; Comply with the Equal opportunities legislation; Comply with the Safeguarding Vulnerable Groups 2006 Act.
- Agreement to work closely with the local community to promote the service, encourage a diverse customer base, distribute publicity materials and continue to develop the service and provide information in different formats and languages on request.
- It should be noted; that this list is not exhaustive and will, in agreement, be enhanced to reflect changes in legislation and policy.
12. The GMATL will work closely with GMPTE and meet quarterly to review the quality of performance. Inclusive of
- (a) GMPTE nominating a dedicated Officer to project manage all GMATL outputs and grant arrangements
 - (b) Ring and Ride targets and budgets as set out in the Service Specification
 - (c) Quarterly accounts set against cost per passenger and other agreed outputs within this service specification
 - (d) Development opportunities
 - (e) Review and evaluation processes
13. Outputs and development priorities for the following financial year will be detailed including the likely level of funding which will be available to support the service. Outline arrangements for a further two years will also be considered. To meet the Authority's budget setting timelines a special budget setting meeting will take place in September each year with a nominated GMPTE project officer, a GMPTE Finance officer and the GMATL Head of Finance.

14. GMATL will produce and report to GMITA Bus Network Committee, with a copy to GMPTE, by the end of December each year a business plan for the following year reflecting the outcomes described in the above paragraph.
15. GMATL will, where possible or appropriate, consult with users and local community groups in the preparation of agreed business plans and reports.

Terms of the agreement

This agreement is for a three-year period, initially from April 2010, to be renewed annually on a rolling three-year basis, subject to GMITA having the necessary financial resources and compliance with the requirements of this specification.

16. Monitoring

Monitoring requirements, targets and actions, to be approved by GMATT and GMPTE and drawn from management information and will include the following;

- i. Customer satisfaction levels (annually) methodology and process to be agreed with GMPTE Project officers
- ii. Escort and companions satisfaction levels (bi-annually) methodology and process to be agreed with GMPTE Project officers
- iii. Numbers of passengers carried (monthly) individual and multi occupancy
- iv. Numbers of trips (individual and multi) refused and cancelled (monthly) – a trip is defined as a single journey from A to B. To include analysis of refusals
- v. Mileage operated, inclusive of dead mileage (monthly) – to be reported as 2 separate categories
- vi. Breakdown of trip purposes in relation to access to the following key services (quarterly)
 - a) Education
 - b) Shopping (Fresh food, Banking / Postal)
 - c) Health Employment
 - d) Leisure,
 - e) Cultural and faith
- vii. Percentage of pick ups within ten minutes either side of the agreed booking time (as technology allows)
- viii. Complaints summary (3 monthly), inclusive of key issues
- ix. Availability of booking facilities: time period when bookings can be made; % of failed calls average waiting times (subject to improvements in telephony)
 - x. Membership profile (new/lapsed members) inclusive of diversity, disability and concessionary pass holder – to be reported after the annual purge
 - xi. Numbers of trips per registered passenger (monthly and annually)
 - xii. Annual report on revenue generated by fares
- xiii. Data for the cross boundary service will be reported separately, where appropriately
- xiv. Information of ad hoc special trips
- xv. Work in partnership with the GMPTE Research and Intelligence department in assessing data analysis

All of the above data will be provided on both a District and Greater Manchester wide basis and inclusive of demographic profile of passengers.

The above Service Specification and outputs is subject to the Terms and Conditions of Contract.