

CABINET

Decision Notices and Minutes of a meeting of the Cabinet held on Tuesday, 9 March, 2010 at 5.00 p.m. in the Civic Offices, Telford

PUBLISHED ON MONDAY, 15 MARCH, 2010

DEADLINE FOR CALL-IN THURSDAY, 18 MARCH, 2010

PRESENT: Councillors A.J. Eade (Leader and Chairman), S. Bentley, S.P. Burrell, E.J. Carter, M.B. Hosken, S.M. Kelly, A. Lawrence and J.M. Seymour

ALSO PRESENT: Councillors R.K. Austin, G.M. Green and V. Tonks (Opposition Group Leaders)

CB-163 MINUTES

RESOLVED – that the minutes of the meeting of the Cabinet held on 23 February, 2010 be confirmed and signed by the Chairman.

CB-164 APOLOGIES FOR ABSENCE

None.

CB-165 DECLARATIONS OF INTEREST

None.

CB-166 A CULTURAL STRATEGY FOR TELFORD & WREKIN AND SHROPSHIRE 2009-2014 ('EVOLUTION, REVOLUTION AND INNOVATION')

Key Decision identified as 'Evolution, Revolution and Innovation' – A Cultural Strategy for Telford & Wrekin and Shropshire 2009 - 14 in the Forward Plan published on 15th January, 2010

Councillor S. Bentley, Cabinet Member: Active Lifestyles – Leisure & Culture, presented the report of the Head of Leisure & Customer Services which outlined and sought approval of the key findings of the new Cultural Strategy for Telford & Wrekin as jointly developed with Shropshire Council.

Following recognition that Telford & Wrekin and Shropshire were closely linked both geographically and culturally through their sub-regional and regional work and aspirations, the need for a 'one voice' approach had been identified to succeed in delivering joint outcomes on behalf of the whole community. A Cultural Consortium had, therefore, been set up between the two authorities in 2009 with a membership drawn from the local authority, private, voluntary and health sector and which had been engaged in the development of the strategy.

Culture was a key contributor to personal development, social cohesion and economic growth and, in its wider sense, had been and would continue to be a major contributor to the tourism history as well as future regeneration ambitions in the Borough and wider sub-region. Therefore, the Cultural Strategy would ensure a better understanding of what the sub-region shared as well as our diversity and would facilitate a move towards a strong shared cultural leadership where Telford & Wrekin and Shropshire was on the map externally as a place to visit for high quality cultural experiences as well as a sound investment opportunity.

The strategy would provide a workable framework that could be used to demonstrate the impact and value of culture on an annual basis, i.e. increases in participation, and which was recognised by national and regional agencies and funders. In addition, it would build and strengthen the infrastructure for culture by bringing together a clearer and more coherent picture of this sector and highlight key priorities for improvement and growth.

The report also set out key findings and development opportunities which had been identified following the work undertaken in the last year including the vision and the seen key objectives.

In presenting the report Councillor Bentley welcomed what he hoped would be the first instance of joint working with Shropshire Council. Councillor Lawrence commented on the possible use of private sector organisations, such as event organisers, and Councillor Bentley responded that this was one of the options that would be explored.

RESOLVED -

- (a) **That the key findings and development opportunities be noted (as set out in Appendix A of the report) and fed into the emerging Active Lifestyles Priority Plan;**
- (b) **That the Telford & Wrekin and Shropshire Cultural Strategy 2009-14 be acknowledged and endorsed.**

CB-167 LOCAL AREA AGREEMENT 2 REFRESH 2010

Non-Key Decision

Councillor S.M. Kelly, Cabinet Member: Efficient, Community Focused Council, presented the report of the Assistant Chief Executive which sought sign-off of the proposed revisions to the Local Area Agreement 2 (LAA2) targets as authorised by the Department for Communities & Local Government (CLG).

The LAA2 was signed off with Government in June 2008 and comprised 37 indicators with stretch targets for 2010/11 against some of the most intractable issues in the Borough, as listed in the report. As well as making a difference to the lives of some of the most vulnerable people in the Borough, achieving the Council's LAA targets was likely to result in a maximum £1m reward grant from Government.

There was a requirement by Government that performance was annually reviewed and targets refreshed and renegotiated, based on both annual performance and any changes in local/national priorities and circumstances. In relation to the 2009/10 review of targets, the CLG had identified a small basket of indicators for which the revision of targets would be considered in 2009/10 i.e. those not locked down in the 2008/09 review because of the impact of the recession and 'Place Survey' indicators. The Council had been informed that all approaches to review any other targets would be rejected by CLG. Following completion of the review of these targets, the report set out the proposed revised position for NI152 Working Age People on Out of Work Benefits, NI154 Net Additional Homes, and NI172 Small Businesses Showing Growth.

At the beginning of February 2010 CLG had announced that authorities could, if they chose, remove NI112 Teenage Pregnancy from the basket of LAA2 targets for the purposes of calculating reward grant. As Telford & Wrekin was not currently on track to achieve this very challenging target, it was proposed that this indicator be removed from the LAA2 reward grant calculation.

RESOLVED – that the proposed amendments to the Council's LAA2 basket be endorsed:

- **NI152 working age people on out of work benefits:**
 - that the methodology be switched to benchmark Borough performance against the national position from an approach that simply tracked year on year Borough performance;
 - that authority to agree the final target be delegated to the Assistant Chief Executive following consultation with the relevant Cabinet Member;
- **NI154 net additional homes in 2010/11 – that the target be revised down from 850 to 522 to reflect the impact of the recession on the housing market;**
- **NI172 small business showing employment growth – no change as the target was on track;**
- **'Place Survey' indicators – no change as current targets offered significant performance challenge;**
- **NI112 teenage pregnancies – that this target be removed from any reward grant calculation.**

CB-168 EXCLUSION OF PRESS AND PUBLIC

RESOLVED – that the press and public be excluded from the meeting for the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in paragraphs 1 and 3 of Part 1 of Schedule 12A of the Local Government Act 1972.

CB-169 LEISURE SERVICES OPTIONS APPRAISAL AND SERVICE REVIEW

Key Decision identified as **Service Efficiency Review of Leisure Services** in the Forward Plan published on 15th December, 2009.

Councillor S. Bentley, Cabinet Member: Active Lifestyles – Leisure & Culture present the report of the Head of Leisure & Customer Services, which detailed the findings and recommendations contained within the recent Leisure Services Options Appraisal undertaken by Northgate Kendric Ash (NKA) the company supporting the Council on the completion of its service review programme. The options appraisal was undertaken between June and December 2009 with its main focus being to consider whether an alternative model of service provision for Leisure and Cultural Services was appropriate for Telford & Wrekin.

Further to the review's recommendation to retain Leisure Services in house, NKA had identified that the services in general were delivering good outcomes through strong partnership working and provided a good, well valued service, as shown by some excellent QUEST scores. Details of the recommendations made by NKA were set out in the report.

In making these overarching recommendations NKA had drawn attention to the need for the Council to focus on partnership working in order to seek efficiencies and savings in the medium to long term rather than focussing on the possibility of quick savings. In addition, the Council should consider the future use of any revenue savings and ensure that some of these savings were reinvested into the facilities and services to fund ongoing maintenance and safeguard their longer-term sustainability.

Councillor Bentley highlighted the recommendation of NKA that the Leisure Services function be retained in house but given a new focus within Active Lifestyles. The Head of Customer & Leisure Services added that she welcomed the recognition given by the consultants to the achievements of the Council in difficult circumstances and given the current state of many of the facilities. In particular she welcomed the recognition of the excellent value for money provided by libraries in the Borough. Councillor Carter said that libraries were an important community resource and one which offered many opportunities to extend the offer of One Stop Shop and Information Centre services throughout Telford & Wrekin.

RESOLVED:

- (a) That the findings and recommendations contained within the Leisure Services Options Appraisal Report, as set out in Appendix A of the report, be approved;**
- (b) That the overarching recommendation to retain the Leisure Services function in house given the focus on the Council's priorities of 'Customer First' and 'Active Lifestyles' be endorsed.**
- (c) That separate business cases be developed on the future options for Horsehay Golf Course, the Ice Rink, and the Ski Slope and presented to the Cabinet for further consideration;**
- (d) That a separate report on the operation of the Telford Trust be prepared for the Cabinet in response to Northgate Kendric Ash identifying this as an outdated model;**

- (e) That a review of fees, charges and concessions be undertaken with options presented under existing delegated authority to the Head of Service following consultation with the Cabinet Member: Active Lifestyles for approval or otherwise;
- (f) That the Head of Leisure & Customer Services review structures in line with 'One Council, One Vision' and secure endorsement via the Council's Corporate Management Team following employee consultation on proposed changes;
- (g) That paragraph 5.0 of the report, which outlined the high level recommendations for implementing the findings of the options appraisal, be noted.

The meeting ended at 5.11 p.m.

Signed for the purposes of the Decision Notices

**Jonathan Eatough
Head of Governance
Date: 15th March 2010**

Signed:

Date:

TELFORD & WREKIN COUNCIL

CABINET – 23rd MARCH 2010

REVIEW OF SCRUTINY ARRANGEMENTS

REPORT OF HEAD OF GOVERNANCE

1. PURPOSE

- 1.1 To inform Cabinet of the recommendations made by Professor Steve Leach in the Review of Scrutiny Arrangements. (Appendix 1)
- 1.2 To consult Cabinet on the recommendations and for these comments to inform the recommendations made by Scrutiny Leadership Board to Council Constitution Committee.

2. RECOMMENDATIONS

- 2.1 Cabinet Members note and, if appropriate, comment for consideration by the Scrutiny Leadership Board, the proposals made by Professor Steve Leach.**

3.0 BACKGROUND

- 3.1 Scrutiny Leadership Board on the 19th November 2009 agreed to commission an independent review of the Scrutiny arrangements. The report and recommendations from Professor Steve Leach is attached as Appendix 1.

4.0 PROCESS TO AGREE CHANGES TO SCRUTINY STRUCTURE

- 4.1 Scrutiny Assembly, Cabinet and CMT are being consulted on the recommendations made by Professor Steve Leach. Comments from these consultees will be taken to Scrutiny Leadership Board on the 25th March 2010 which will make any recommendations to Council Constitution Committee on the 13th April 2010. Any changes to the constitution recommended by Council Constitution Committee will go for approval to Full Council on the 29th April 2010.

5.0 EQUALITY AND DIVERSITY

- 5.1 As part of their work all Scrutiny Committees, Scrutiny Reviews and Special Interest Meetings consider the equality and diversity implications of the issue under consideration.

6.0 ENVIRONMENTAL IMPACT

- 6.1 This report does not have any direct environmental impact but Scrutiny will review the environmental implications of the issues under consideration.

7.0 LEGAL IMPLICATIONS

- 7.1 The Council has a duty to scrutinise its work and that of NHS and partner organisations and will have a responsibility to appoint a scrutiny officer by 1st April 2010.

8.0 LINKS WITH CORPORATE PRIORITIES

- 8.1 The proposal made by Professor Leach retains the link between Scrutiny and corporate priorities through the Lead Scrutiny Members.

9.0 OPPORTUNITIES AND RISKS

- 9.1 The proposals from Professor Leach opens the opportunity for Scrutiny to become more involved in the development of Council policy. The Scrutiny Team will continue to support the Scrutiny arrangements agreed through this process.

10.0 FINANCIAL IMPLICATIONS

- 10.1 There are no direct financial implications from this report. Scrutiny arrangements will be supported by the Scrutiny budget.

11.0 WARD IMPLICATIONS

- 11.1 There are no ward implications resulting directly from this report.

Report prepared by Jonathan Eatough (Head of Governance), Tel: (01952) 383200

Review of Scrutiny Arrangements at Telford and Wrekin

Introduction

- 1.1 In January 2010, I was commissioned to carry out a review of the scrutiny arrangements in Telford and Wrekin Unitary Authority. The brief for the review is included as Appendix 1. The fact that the time available for the review was limited, with three days of interviews and observation during a three day period (February 10 – 12th) and then one week to submit a draft report (February 22nd) meant that I was unable to deal with all the requirements of the brief as fully as I would have wished. However I am confident that I have identified the main challenges facing scrutiny in Telford and Wrekin, and have developed a series of recommendations in response to these challenges.
- 1.2 During the February 10 – 12th period, I interviewed the council leader and deputy leader, the chair of the Scrutiny Leadership Board and (in 3 separate focus groups) 11 active scrutiny members and 4 co-optees. I also interviewed 8 officers, including the chief executive, 2 strategic corporate directors, the Head of Finance and 3 members of the scrutiny team. I subsequently conducted a further 5 interviews by phone, including one with the cabinet member with responsibility for the priority ‘an efficient and community-focused council’. I also observed a meeting of the Value for Money Scrutiny Monitoring Group on February 10th and studied various helpful background documents (e.g. the Scrutiny Handbook) and a range of recent reports from task-and-finish groups (including Procurement and Bus Services). These various sources of opinion

and information enabled me to form a balanced picture of the strengths and weaknesses of scrutiny and the challenges facing it.

1.3 The report is divided into four main sections. The first section argues that the onset of the recession, and the financial cutbacks that will continue to affect Telford and Wrekin will require a major rethink of scrutiny's priorities. The second section contains an evaluation of the scrutiny's current structure, processes and performance. In the third section the contribution which structural change could make to improved performance is discussed, including a comparative evaluation of different options. Finally in the fourth section a series of recommendations which would be likely to improve the effectiveness of scrutiny are set out and justified.

1.4 I am grateful to all those who agreed to be interviewed or attended focus groups. Particular thanks go to Fiona Bottrill and the scrutiny team for arranging my programme of interviews at short notice and acting as a reference point during my visit.

The impact of the recession on the priorities for scrutiny

2.1 There are many functions which scrutiny can carry out including policy development, policy review, budget formulation and scrutiny, external scrutiny performance monitoring and holding the executive to account. All authorities have to prioritise these different functions. The recession, and in particular its

impact upon the financial resources available to Telford and Wrekin makes a re-assessment of the priorities of scrutiny essential.

2.2 Currently the main priorities for scrutiny are policy reviews, (some of which have covered the responsibilities of external bodies – e.g. the recent review of local bus services) budget scrutiny and (to a lesser degree) performance monitoring and holding the executive to account. The programme of policy reviews was last year developed through the medium of an imaginative ‘away day’ workshop. These reviews, which can be influenced by the views of cabinet members, are typically carried out in task-and-finish group mode, although other mechanisms – e.g. spotlight reviews and special interest meetings are also used. Budget scrutiny and performance monitoring form the main responsibilities of the ‘Value-for-money’ Scrutiny Monitoring Group. Holding the executive to account is done in various ways, with a formal call-in being seen as a ‘last resort’, if the concerns of members cannot be resolved in other ways.

2.3 It is appropriate that scrutiny itself should have the right to decide its priorities and its programme of work on a year-by-year basis and in more normal circumstances, the current set of priorities and the current method of developing the work programme (especially the content of the ‘in-depth’ studies carried out by task-and-finish groups) might be seen as appropriate. However these are not normal circumstances. Local authorities are currently operating in a very different financial climate, where the challenges of maintaining services and dealing with the fall-out of the recession, with reduced financial resources are

indeed formidable. In this situation, there is a new responsibility for scrutiny to ensure that the way it spends its time contributes materially to meeting this challenge. Scrutiny should no longer have the luxury of developing its own programme, irrespective of the agenda facing the local authority as a whole.

- 2.5 This new responsibility does not of course mean that it should compromise its independence of the executive, not that it should cease to take seriously its ‘holding to account’ role, nor that it should not continue to identify and where appropriate highlight issues of public concern as potential scrutiny topics. But it does mean that it should take very seriously the role it can play in helping the authority through the very difficult 4-5 years ahead, by taking on pieces of policy development or policy review work which can make a real contribution to the authority’s capacity to respond to the recession – linked agenda.

Evaluation of the Scrutiny’s Current Performance

- 3.1 There are several strengths in the way scrutiny currently operates in Telford and Wrekin. The emphasis on task-and-finish projects is a positive motivation for a reasonable number of members, and typically results in good quality reports (although the degree of influence they have had has varied). There is a commendable (and largely successful) determination to try to minimise the influence of overt party politics on the work of scrutiny. The authority has a well-deserved reputation for its proactive stance to the scrutiny of health issues, which has continued under the new structures introduced in January 2009. The Value for Money sub group has been reasonably effective in its budget scrutiny

and performance monitoring roles and is popular with its members. There is an all-party recognition that scrutiny needs dedicated officer support to operate effectively, and despite a number of staff changes in 2009, the Scrutiny Team has continued to provide effective support and is widely valued.

3.2 However there are a number of issues of concerns which have developed following the introduction of new structures and in the light of the impact of the recession on Telford and Wrekin. These issues can be summarised as follows.

- ❖ Scrutiny has not yet adapted its work programme sufficiently to respond to the impact of the recession, nor to the priorities adopted by the council (One Council: One Team: One Vision)
- ❖ The new structures are confusing for many members and have not significantly improved member involvement and commitment levels (although those members who had previously demonstrated commitment and involvement have continued to display these qualities)
- ❖ The more informal nature of the sub-groups has overcome some of the limitations of the previous commission-based structure, but has also resulted in problems relating to constitutional status, procedure and ability to influence
- ❖ Scrutiny is not currently proving effective in holding the cabinet to account
- ❖ The current structure is problematical for co-optees and especially for the statutory co-optees nominated by educational bodies
- ❖ The system of cabinet assistants has resulted in the Conservative group being under-represented in the scrutiny process with the result that shared ownership of the scrutiny process, has not been achieved

3.3 As many of these issues revolve around the impact of the introduction of the new structures, it is appropriate to address this issue first. The new structures were introduced as an attempt to change the culture of scrutiny working, which was perceived by several (although by no means all) of those involved to have lost momentum during the 2007-2008 period partly because of the mode of operation of the Commissions. It was felt that the Commissions spent too much time on topics where they could not add value and whose proceedings were (in several cases) too dominated by long officer presentations which were certainly informative, but which did not result in scrutiny making much (if any) difference to the issues concerned.

3.4 The new arrangements have a degree of logic to them. The Scrutiny Leadership Board (SLB) is in principle an appropriate mechanism which has the capacity to provide effective leadership and co-ordination to the scrutiny process. Leadership Boards of this nature are widely regarded as good practice (CfPS (2005), not least because they provide an appropriate organisational counterpart to the cabinet. Similarly the idea of a Scrutiny Assembly, at which all non-executive members and co-optees involved in scrutiny can meet from time to time, to provide a steer to the work programme and to discuss issues of major significance (such as changes in structure) is in principle a sensible one, which has increasingly been introduced elsewhere by 'good practice' authorities. There are confusions about the role and operational problems within both the Leadership Board and Assembly but both are in principle sensible mechanisms.

- 3.5 The four sub-groups, however are more problematical, both in principle and in practice. First, there is no consistent pattern to their remits, covering as they do, a broad service area (Health and Adult Social Services) an important but limited aspect of Children's Services (Corporate Parenting), a concern with budget scrutiny and performance monitoring in an authority wide basis (VFM) and a major long-term educational building project (Campus Telford and Wrekin). This is a strange mixture of the broad and the detailed and leaves major gaps in the subject matter covered by scrutiny (which the 'task-and-finish' projects only fill to a limited extent). This inconsistency cannot be justified.
- 3.6 Second, the mode of operation of each sub-group is problematical. It falls somewhere between a properly constituted scrutiny commission (requiring political balance, formal agendas and minutes, and public and press notification) and a working group (such as those set up to carry out a task-and-finish project) for which there are no such requirements. This indeterminate status is confusing to members, officers, the media and (in so far as they are involved) the public. There have been instances, for example, where an issue to be considered by the Health sub-group has generated media and public interest, resulting in requests for reports and agendas which cannot easily be met, given the normal operating procedures of the sub-groups.
- 3.7 There are advantages in the lack of requirement for political balance, and informality. In relation to political balance, the pressures have been reduced on the hard-pressed group of Conservatives members outside the cabinet, which currently totals 23% of those eligible for scrutiny, but which under political

balance would be required to total 50% of scrutiny positions. In addition the membership of the sub-group is more likely to consist of councillors genuinely interested in the topic, rather than those whose presence is required because of political balance requirements. Informality enables a more productive working environment for certain activities than has been possible within the Commissions. However these advantages, important though they are, have to be set against the constitutional and procedural confusions.

3.8 Thirdly, the lack of formal agendas and procedural uncertainties appear to have resulted in a tendency for officers (other than the Scrutiny and Democratic support staff) to take the sub-groups less seriously than they did the predecessor Commissions. There was a lot of concern expressed by members (including co-optees), about issues such as how information is distributed and the lack of follow-up capacity relating to actions which mainstream officers have agreed to take, which reflected a general lack of clarity (on the members' part) as to what these sub-groups were there for, and what they could reasonably insist on, in relation to officer information provision and attendance by officer and cabinet members.

3.9 A fourth related point is that because of the informal nature and their patchwork nature of their remits, there has been very little attempt to 'hold the cabinet to account', which should be one of the most important roles of scrutiny. The cabinet do not feel they are being held to account, and nor does anyone involved in the scrutiny process.

3.10 The fifth problem relates to the role of the co-optee members of the scrutiny sub-group. There is less of an issue in relation to health, where the co-optees are playing a proactive and helpful role and appear content with the current arrangements, than there is in relation to 'Campus Telford'. The remit of this sub-group has confused the education co-optees. They have an interest in education in the broadest sense; yet they have been channelled into the Campus Telford sub-group which has a narrow remit, in which education per se plays a limited part. True they are also members of the Scrutiny Assembly, but this body meets only occasionally, and rarely discusses education topics. Co-optees with a particular interest in environmental issues find it hard to see where they fit into the new structure. The new structure has marginalised the potential contribution of the education (and some other) co-optees and their sense of being a valued part of the scrutiny process. This is not an acceptable outcome.

3.11 The existing structure is not viable. Although the SLB and the Scrutiny Assembly can be justified, so long as a greater clarity of functions and working arrangements can be devised, the current sub-groups cannot, either in terms of remits and working arrangements. A different balance between constitutional viability and capacity for informal working is required. In addition their capacity to challenge the cabinet needs to be strengthened.

3.12 The second main problem associated with the current way of working of the scrutiny arrangements is the way in which the work programme is established. This may appear a strange viewpoint, given the detailed (and largely appropriate) criteria which exist for the selection of in-depth studies, and the

positive evaluation by members and officers alike of the Scrutiny Assembly workshop – style meeting in 2009 at which the topics for the 2009-10 work programme were discussed and agreed (subject to refinement by the SLB). Indeed if local authorities operated in a more benign financial climate, where resources were available for new initiatives, then the current way of developing the scrutiny programme would have much to commend it. However in the unprecedented recession-related circumstances in which all authorities find themselves, it is essential that scrutiny plays its part in contributing to the ability of the council to deal with the challenging agenda facing it (see 2.1-2.3 above). Currently the work programme formulation process, despite its positive qualities, is not geared up to making this kind of contribution. In addition the current channels of communication between the cabinet and scrutiny (including KIT – the ‘keep in touch’ principle) do not appear to be equipped to remedy this shortcoming.

3.13 The task of developing the capacity of scrutiny to carry out the kind of in-depth policy development and review work which has become a high priority, would be greatly facilitated by an increase in the number of Conservative group members who are involved in the work of scrutiny. Currently there is not really a shared ownership of the scrutiny process amongst all parties. The adoption by the Conservatives of a ‘cabinet assistant’ system has had the effect of preventing the participation in scrutiny of a group of 7 able* Conservative councillors (in addition to the 7 who hold formal cabinet positions). As noted

* it can be assumed that they are seen as amongst the most able group members to have been drawn into the cabinet in this way

earlier, this measure has meant that there are only 11 Conservatives remaining (which will increase to 13 following the February 11th by e-elections) to operate as members of scrutiny boards and sub groups. The more experienced Conservative councillors involved have shown commitment and made a valuable contribution, but it has put huge pressure on them, and has contributed to a perception that there is not a shared ownership of the scrutiny process, with the Conservatives being significantly under-represented, in the light of their position as the dominant group on the council. If the council is to move to a position where all parties are committed to contributing to a policy development and review process, the outputs from which will ultimately be taken forward by a Conservative administration, then ways have to be found of increasing the involvement of Conservative members in the scrutiny process. This requirement in turn implies a review of the role of cabinet assistants, including an examination of whether their cabinet involvement necessarily precludes them from a role in scrutiny.

Conclusion

3.14 The analysis set out in the preceding pages implies the need for a re-assessment of the structures, processes and procedures of scrutiny which would achieve the following ends.

- ❖ Strengthening its capacity to undertake policy development and review projects which would contribute materially to the council's capacity to meet the demanding challenges associated with the recession and the severe financial cutbacks required

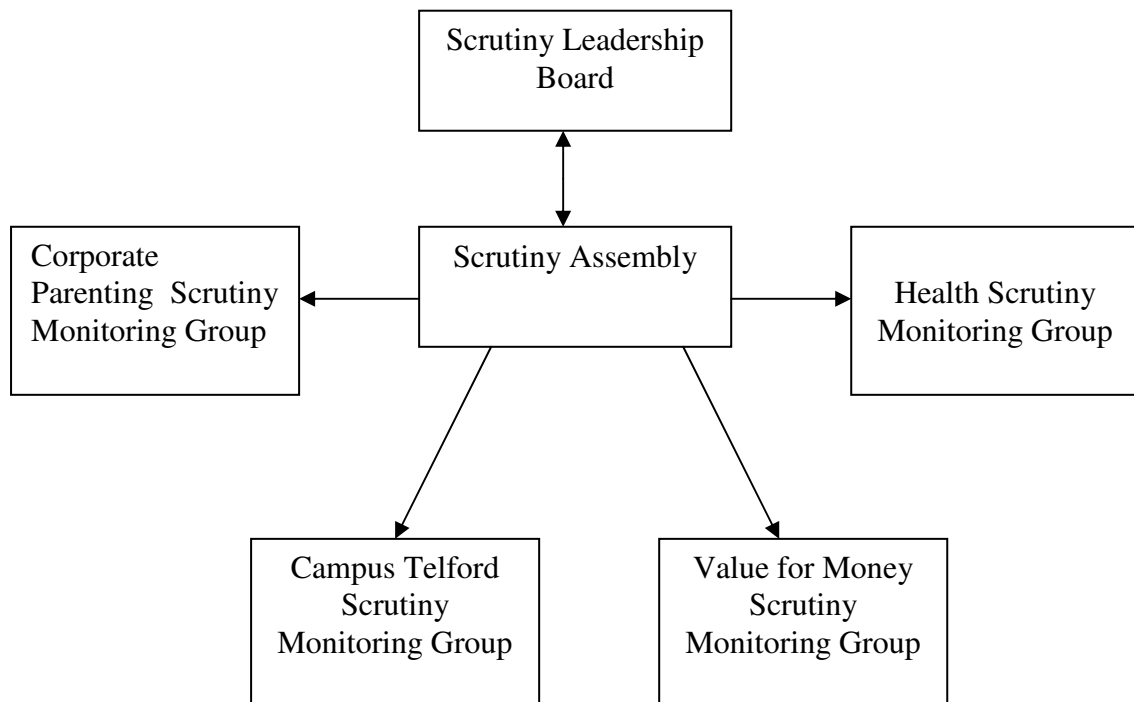
- ❖ Increasing the numbers of Conservative councillors involved in the scrutiny process, in particular the policy work highlighted above
- ❖ Restructuring the way scrutiny's work programme is drawn up so that the most appropriate policy topics can be identified and undertaken
- ❖ Overcoming the confusions and inconsistencies involved in the current remits and operating procedures of the sub groups which are attached to the SLB
- ❖ Retaining the benefits of informal working, whilst ensuring that the scrutiny arrangements operate on a sound constitutional basis

The Contribution of Structural Change

4.1 One should always be wary of 'structural fixes'. Organisational culture, appropriate processes and the commitment of individuals can be just as important as structures in facilitating the achievement of priorities, often more so. All these factors can contribute materially to the achievement of priorities for scrutiny, as will be demonstrated later. However, structure can also play its part, and at a time when major structural changes have been made to the senior management structure and to the allocation of responsibilities within the cabinet, it is important to address what implications these changes have for scrutiny structures. Structural change may be necessary, but there would need to be a clear justification for it.

4.2 The current structure (see Diagram 1) has been in operation since January 2009.

Diagram 1: Scrutiny Arrangements



From Scrutiny Handbook 2009

One of the aims of the new structure was to change the culture of the 4 former scrutiny commissions, which were seen by many as increasingly unproductive, and to decrease absenteeism (which was relatively high under the old system). Views about it are mixed; it has its enthusiasts and its detractors. Those who support the new structure argue that it is only a year since it was established, which is not an adequate span of time to be able to judge its effectiveness. Also, there has been a period of staff upheaval within the Scrutiny Support Team, which may have restricted its capacity to facilitate the effectiveness of the new structure. Detractors are critical of the lack of clarity involved in the role and operational style of the four monitoring groups. Concerns were also

expressed about inconsistency in the allocation of responsibilities (and SRAs) amongst lead members and chairs of the monitoring groups. Some felt simply that the new structure had made very little difference.

4.3 There was also criticism of the role and effectiveness of the Scrutiny Leadership Board (SLB) and the Scrutiny Assembly (SA) respectively. However, both these structural features have been introduced elsewhere to good effect and would be regarded as 'good practice'. Whatever other changes are made there is a strong de facto case for retaining both structural elements with their roles suitably clarified.

4.4 More problematical has been the operation of the sub-groups. These problems were discussed in detail on p 6-7 above. Even if changes in the overall structure were not considered necessary, changes would certainly be required in their constitutional status and mode of operation.

4.5 In considering the future of the scrutiny sub-group structure*, three options emerged for the discussions in the interviews

1. Status quo: the argument here is that the new structure has only been up and running for a year. It requires more time to demonstrate whether it can work effectively in conjunction with the new structures within senior management and the cabinet.

* i.e. the structure which operates below the assembly level

2. Priority-based sub-groups: given the centrality of the seven priorities in ‘One Council; One Team; One Vision’, there is a case for introducing a structure for scrutiny based on these priorities
3. Issue or service-based sub-groups: given the dominance of the seven priorities in the executive and management structure, there is also a case for adopting a different categorisation for scrutiny sub-groups, not least to ensure that a (new) silo mentality does not develop around the six priorities (the use of a different categorisation would be congruent with the principle of matrix management)

4.6 In my view, the second option should not be pursued although it admittedly has a degree of logic to it (for example matching scrutiny sub-group remits to priorities would facilitate the function of holding cabinet members (and strategic directors) to account). The accountability link already exists, in that the six scrutiny lead members already each have a responsibility for a particular priority. This set of responsibilities should be retained. The use of the seven priorities as a basis for changing the structure of scrutiny would, in my view, involve a greater degree of potential problems than potential benefits particularly in that it would result in the (over) dominance of one organisational design principle above any alternative. It would also result in an over-elaborate structure, and represent something of a missed opportunity (see below).

4.7 The third option is preferable in a ‘checks and balances’ sense in that it provides a different way of dividing up reality to avoid the development of ‘silo thinking’. There remains the issues of what organisational principle should be

used. There are various possibilities – location (e.g. South Telford) client group (e.g. prolific service-using families) cross-cutting issues (e.g. community cohesion) or traditional (but still relevant) service categories (e.g. education).

- 4.8 However there is also a persuasive case for retaining much of the status quo. The structure introduced in January 2009 hasn't yet had a reasonable time to demonstrate its effectiveness (or otherwise). The Scrutiny Leadership Board and Scrutiny Assembly are both acknowledged examples of 'good practice', which work well in other authorities. Both the Health sub-group and the Value for Money sub group have settled down well and made a significant impact. The Corporate Parenting sub group covers an important issue for the council and shows signs, after a period of uncertainty, of developing a more productive role although its remit does create problems for co-opted members with an education background.
- 4.9 The most appropriate way forward, in my judgement, is a modified status-quo model which introduces elements of the issue or service-based organisational principle into a modified version of what already exists. There would need to be a clarification of constitutional status and mode of operation of all the existing elements which are retained. And crucial to the capacity of the new arrangements to deliver in terms of the challenging recession-linked agenda facing Telford and Wrekin would be a redesign of the existing system for identifying the programme of in-depth studies, which should involve a greater degree of negotiation between cabinet and the Scrutiny Leadership Board.

Recommendations

Set out below are the main changes to structure and processes which are recommended.

5.1 The Scrutiny Leadership Board

The Scrutiny Leadership Board (SLB) should be retained at its current size, and with its existing political composition (3 Conservative; 2 Labour; 1 other). The principle of allocating a shadow portfolio to each of its six members should be retained, with the current chair of the SLB holding the shadow portfolio for ‘Adults Care and Support’ (which includes the Health Scrutiny function). One SLB member would need to cover two portfolios (perhaps the Economy – and Housing – related briefs), unless the size of the SLB were to be increased to 7.

5.2 The tasks identified for the SLB in the Scrutiny Handbook are in general appropriate. The problem is that they are not well understood by all its members, nor is the work of the SLB always focused on these tasks.

5.3 The agendas of the SLB should become more focused, with ‘general discussion’ sessions (about progress or emerging issues) identified on the agenda when required, but given a (time-limited) slot in the meeting to enable the SLB to do justice to the more specific items of business facing it. There should in addition be a much more systematic system of briefing and reporting back between the SLB and the sub groups (or panels) attached to it.

5.4 The Scrutiny Assembly

The Scrutiny Assembly should continue in existence and continue to meet on a quarterly basis. Its key role should be to increase the commitment of all members involved in scrutiny, by enabling them to make a real contribution to the priorities and work programme of scrutiny. The role of the Scrutiny Assembly and the meetings earmarked for it in the Scrutiny Handbook seem appropriate. It should also be used as a way of keeping all scrutiny members (including co-optees) informed about the progress of scrutiny initiatives throughout the year. The ‘extranet’ may prove particularly helpful in this respect.

5.5 The Scrutiny Monitoring Groups

The sub-group structure of scrutiny should be modified in the following ways.

- a) Three scrutiny panels should be established, and given a proper status within the constitution. The principle of political balance should be applied, and the panels should be subject to the normal expectations of public agendas and minutes, and should be serviced by democratic support staff. In two cases (‘Health and Adult Care Services’ and ‘Value for Money’) the new panels should operate with the same remit as the parallel scrutiny monitoring groups which currently exist. In the third case ‘Children’s Services’ a new panel should be established with a remit which covers the full operation of educational and child protection services. This panel would form a natural home for the education co-optees.

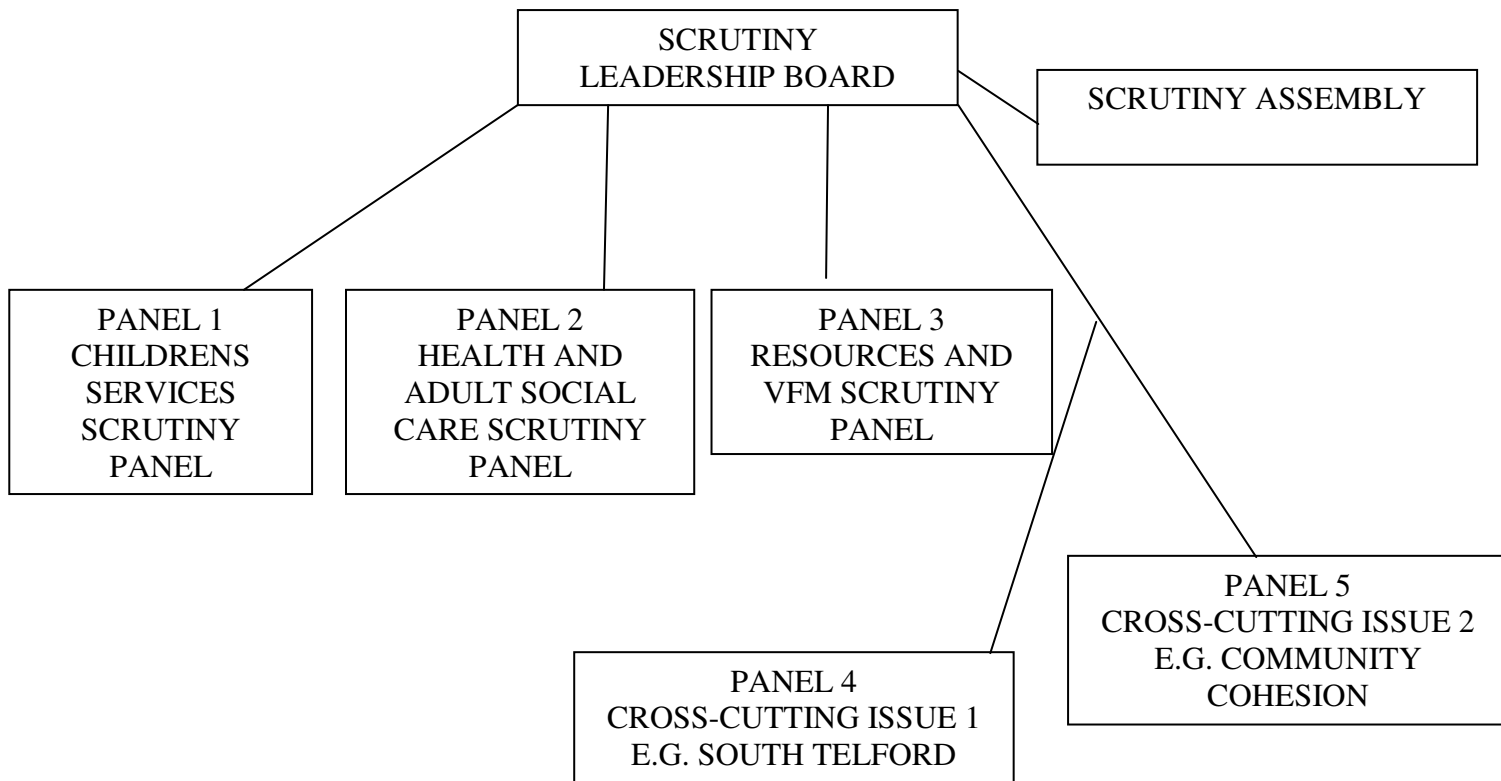
- b) The remit of the Campus Telford and Wrekin scrutiny monitoring group should be subsumed within the remit of the proposed Children's Service Panel, and should thus be discontinued as a separate entity.
- c) The existing Corporate Parenting Scrutiny Monitoring group should be reconstituted as a small working group attached to the Children's Services Panel. Constitutional status and political balance would not be necessary. Any issues requiring formal action should be referred to the Children's Services panel for action.
- d) The three new panels should meet quarterly on a formal basis (or possibly every two months). Between formal meetings, a programme of work involving an appropriate balance of in-depth reviews, spotlight reviews special interest meetings and training sessions should be organised to meet the panel's commitments.
- e) At the joint cabinet/scrutiny programme planning meeting (see below) at the start of the municipal year, two further panels should be established to undertake projects which it was agreed had the potential to contribute materially to the achievement of the council's corporate priorities, in the context of the recession and the difficult financial situation faced by the council. Such projects could cover particular problematical areas of the authority (e.g. South Telford) particularly client-groups (e.g. families who are prolific service users) or particular issues within one of the council's strategic priorities (e.g. community cohesion, homelessness, school to work transition). The panels concerned would not require formal constitutional status or political balance in their membership. Interest in the topic concerned would be the key requirement. These

panels would decide their own meeting frequency and pattern of work, in the context of the brief provided for them following the annual cabinet/scrutiny liaison meeting. Their work would be focused on policy development or policy review projects, but within a broader priority area than the topics previously addressed in in-depth reviews.

- f) Any reports emerging from any of the panels (formal or informal) would be referred in the first instance to the SLB for comment. The SLB would not however have the power to change the content of any report, including the recommendations. The panel concerned could then (if it wished) modify its report, before submitting it to the cabinet.
- g) Debates on major reports could also take place at the scrutiny assembly or full council, where there was sufficient interest and where this was felt to be appropriate.

The new structure is illustrated diagrammatically in Diagram 2.

Diagram 2 : The proposed new structure



5.6 For this new structure to work effectively, two conditions would be necessary. First, the involvement of the Conservative group in Telford and Wrekin in the activities of scrutiny would need to be considerably strengthened. Secondly, the way in which the scrutiny work programme was drawn up would require significant changes.

Strengthening the Involvement of the Conservative Group

5.7 The strengthened involvement of the Conservative group is crucial because the new priority for scrutiny in the current circumstances would be to support the cabinet in its work (whilst retaining the holding to account role). Ultimately,

however impressive the in-depth work of a scrutiny panel was, it would not be influential unless it were to be accepted and taken forward by the cabinet. It has been argued that this outcome is more likely if the cabinet were to play a more proactive role in the setting of the scrutiny work programme and it would also be facilitated by a greater Conservative presence on the task-and-finish groups and panels. Some of those Conservative members who currently operate as cabinet assistants would have the skills to play a lead role in these groups and panels; something which they are currently precluded from doing.

5.8 The deployment of cabinet assistants, although by no means unique, is a device operated by only a small number of authorities. Clearly, if the practice was discontinued in Telford and Wrekin, it would free up the members concerned to play a major role in scrutiny. However recommendations about this choice are a matter for the Conservative group and are outside the scope of this report.

5.9 However there is another possibility. In other authorities which operate with cabinet assistants, it has not been felt to be necessary to exclude them from scrutiny activity. Cabinet assistants occupy something of a hybrid position. They are included within the cabinet, but cannot legally be allocated any decision making powers, either individually or collectively. Political advisors is perhaps the most realistic way of characterising their role. In those circumstances, some authorities have taken the view that there is no reason why cabinet assistants should not serve on scrutiny panels nor indeed lead in-depth reviews, so long as they do not do so in subject areas for which they have advisory cabinet responsibilities. Thus if a cabinet assistant played a major role

in cabinet in relation to ‘healthy communities’, it would not be advisable for he or she to a member of the Health Scrutiny panel. However there would be no reason why membership of a children’s services scrutiny panel should not be acceptable for this individual, nor a lead role in a panel focusing on a cross cutting issue such as community cohesion. This change in the rules would need to be agreed in Telford and Wrekin for the requisite strengthening of Conservative involvement in scrutiny to be achieved.

Strengthening the Relevance of the Work Programme

5.10 The second condition – change in the way the scrutiny work programme is drawn up – is necessary to strengthen the degree of cabinet influence on the work programme. If it cannot exercise such influence, then the potential impact on the cabinet of the in-depth studies which scrutiny carries out is very much reduced, and the aim of increasing the capacity of scrutiny to contribute to the recession-linked council agenda becomes less likely to be achieved.

5.11 The implication is that a key part of the way in which scrutiny decides its annual work programme should be an in-depth discussion with the cabinet about this programme, in which the cabinet is able to explain what pieces of work it would find most useful, and why. This discussion could take place as part of the Scrutiny Assembly programme development ‘away day’, the format of which proved so successful in 2009. It could also take place shortly after this event, when the SLB is clear about the priorities which have emerged from the

scrutiny side, and would hence be in a better position to discuss and negotiate a programme with cabinet.

5.12 The ideal outcome would be a work programme which consisted of some items which had emerged from the Assembly away day, but also some items which cabinet had persuaded the SLB that it would be to everyone's advantage if they included them in their work programme. The joint meeting could also usefully agree the remits and briefs for the two 'cross-cutting' panels which were advocated earlier in this report.

5.13 For a dialogue of this nature to prove productive (in the sense of increasing the role of scrutiny in supporting the cabinet) there would have to be an acknowledgment on the part of the SLB that it was appropriate that scrutiny should indeed move in this direction. Cabinet cannot of course tell scrutiny what it should do, nor would that be appropriate. There is nothing to prevent the SLB ignoring the proposals made by the cabinet, and emphasising its right (and intention) to set its own work programme, irrespective of cabinet suggestions of policy reviews or development it would find particularly helpful. But to do so would reduce scrutiny to a marginal role, at a time when its positive contribution to the future of the authority could be immense. Nor would a positive response be incompatible with a rigorous approach to 'holding the executive to account'. Indeed there is scope for scrutiny to operate as a real 'critical friend' by becoming more critical as well as more friendly.

Other Recommendations for Change

- 5.14 There should be an expectation that the chairs of the five panels should be drawn from the membership of the SLB. If however it is agreed that the chair of a panel would more appropriately be filled by someone other than an SLB member, then that chair should receive an SRA equivalent to that of an SLB member. If the council wishes to restrict scrutiny SRAs to 6, then the implication is that the SLB member who does not chair a panel should not receive an SRA. In other words, the six SRAs should be allocated to the chair of the SLB and the chairs of the five panels.
- 5.15 The brief for in-depth studies should recognise that in the current financial climate, proposals for change that involve additional expenditure are not likely to be feasible, unless compensatory savings (resulting from the proposals) can be identified elsewhere in the budget, **or** the additional expenditure can be justified in terms of its contribution to the council's priorities.
- 5.16 Members of in-depth reviews (and spotlight reviews/special interest meetings) should be encouraged to be more radical in their thinking, seeking to develop imaginative new ways of providing services and achieving priorities which can either increase quality at no extra cost or maintain quality with lower costs. Such outcomes would be greatly beneficial in helping the authority to use its limited resource more efficiently and effectively.
- 5.17 The formalisation of three of the panels (Children's Services, health and Adult Care and Value for Money) will strengthen the capacity of scrutiny to hold

cabinet members to account. The panels should not hesitate to use this capacity if they are concerned about any cabinet decision-planned or already taken – within their sphere of responsibility. The SLB should adopt a similar approach, particularly for cabinet decisions which fall outside the remit of the three formal panels. In all cases, however, the cabinet member concerned should be briefed in advance about what questions the SLB or panel wish to raise with him or her.

5.18 Holding the executive to account would not be an appropriate role for the two other panels whose main task would be policy development or review. However there would be every reason to involve cabinet members in a different way, that is as ‘expert witnesses’ in the work of the panel. Although cabinet members cannot be members of scrutiny panels (or task-and-finish groups) their views and experience can be drawn upon whenever that is felt to be helpful. In this way, cabinet members can make a real contribution to policy development/review, whilst acknowledging the lead role which scrutiny is playing in the process.

5.19 The current arrangements for call-in, whereby discussions take place with the members who are minded to invoke the call-in procedure to see if the concerns involved can be resolved without a formal call-in, are sensible and should be retained. However such concerns cannot be resolved in this way, it would be better if the monitoring officer were the final arbiter of whether the call-in request meets the criteria set out by the council. In coming to a decision he should seek the views of the chair of the SLB, as well as those of the applicant.

5.20 There may also be advantages in reducing the number of councillors required to initiate the call-in procedure. It is currently 5, which means that some of the smaller groups may find it difficult to elicit support from members of the two major parties. The alternative of requiring only 3 members to be party to a call-in request should be seriously considered. This change would be in line with practice in many other authorities (indeed some authorities permit call-ins from individual councillors). The important element in the process is ensuring that there is a substantive justification for the call-in, within a framework of criteria agreed by the council.

5.21 The format of the forward plan should be revised and an attempt made to make it more accessible to scrutiny members so that they can more readily make a judgement about any issue upon which they want to express a view before the cabinet discusses it. However a more open sharing of the cabinet work programme in liaison meetings with scrutiny would probably achieve the same end.

5.22 Joint liaison meetings of the cabinet and SLB should take place twice a year. The first meeting should take place as soon as feasible in the municipal year to discuss and (hopefully) agree a programme of in-depth reviews which were appropriate to the strategic priorities of the authority (and the impact of the recession) and also to agree the subject-matter of the two informal panels. The second meeting should take place midway through the municipal year, to discuss progress and to amend the programme if necessary.

5.23 The process for agreeing the work programme for scrutiny discussed in 5.11 – 5.12 above would still leave scope for in-depth reviews, spotlight reviews and special interest meetings, on topics which were felt to be priorities by scrutiny members but which fell outside the priorities and suggestions emanating from the cabinet. However, in the new circumstances, and given the limits to the overall number of in-depth reviews which are feasible, a smaller number of such priorities would have to be agreed. The Scrutiny Assembly programme planning away day should continue to be the key mechanism for generating and evaluating such priorities. In deciding priorities particular attention should be paid to issues of public concern, where the council is in a position to respond to the problem or to influence other agencies to do so.

5.24 Given the role proposed for scrutiny in contributing in a major way to the development or review of policies which will help the authority to respond to the challenges of the recession with diminished financial resources, it is essential that the scrutiny team should be retained at its current strength (as at March 2010) to enable it to effectively support this new priority (as well as the on-going functions).

5.25 Training and development programmes which are tailored to the specific needs of scrutiny chairs and active members are an essential contribution to good scrutiny. The council should review its current training programme, in the light of any change it decides to make as a result of this report and seek to provide a range of relevant modules which will enhance the skills of scrutiny members. A priority should be given to the development of leadership capacity amongst scrutiny

chairs, whose contribution will be crucial to the success of the proposed arrangements. However it is also essential that all scrutiny members be strongly encouraged to develop relevant skills, to strengthen the part they can play in the demanding agenda which faces scrutiny.

Brief for Review of Scrutiny Arrangements and Lead Member Appraisals

2009/2010 Telford and Wrekin Council

Background

It was agreed by the Council's Scrutiny Leadership Board at the meeting on 19 November 2009 that the annual appraisal of Scrutiny Lead Members would be combined with a wider review of the Scrutiny arrangements introduced in January 2009. It was agreed that an external consultant would be engaged to undertake this work and report back to Scrutiny Leadership Board on 25 March 2010.

Aim of the Review

The Review will:

- Appraise the work of the Lead Scrutiny Members based on the issues identified in the Lead Member Appraisal framework
- Assess the effectiveness of the scrutiny structure of Scrutiny Leadership Board, Scrutiny Assembly and Sub Groups in scrutinising the work of the Council, NHS and partners involved in the Local Area Agreements
- Assess the effectiveness of Scrutiny in undertaking the work programme of reviews, spot light reviews and special interest meetings
- Consider any implications for Scrutiny of the recent restructure under 'One Council, One Team, One Vision'
- Review the support arrangements in place to enable Scrutiny to effectively undertake its function in the context of the Council's recent restructure

- Assess the effectiveness of the Scrutiny arrangements as part of the Council's governance arrangements This will form part of the evidence reported to Audit Committee on 30 March 2010.
- Make recommendations to Scrutiny Leadership Board based on the evidence gathered during the review, national developments in Local Government Scrutiny and national good practice.

Methods

The review will require a range of evidence:

- Document review (Appendix 1)
- Observing Scrutiny meetings in progress
- Meetings with Scrutiny Members (political balance and engaged / not engaged)
- Co-opted Members focus group
- Member appraisal questionnaire and interviews
- Meeting with Leader and Executive Members
- Chief Executive / Director interviews
- Meeting / focus groups with Lead Officers

Time Scales

The final report will be presented to Scrutiny Leadership Board on the 25th March 2010. The draft report should be received week commencing 1 March 2010 to be signed off by the Chair of Scrutiny Leadership Board Week commencing 8 March 2010. The review will involve 5 – 6 days work broken down approximately as follows:

Planning and preparation	0.5 day
Document review	0.5 day
Interviews, focus group, attending meetings	2-3 days

Write up	1 day
Draft report to be signed off by Chair of SLB	0.5 day
Present to Scrutiny Leadership Board	0.5 day

Officer Support

The Scrutiny Team and Democratic Support will co-ordinate meetings / focus groups.

The main point of contact will be the Scrutiny Manager.

--- Maintaining a High Quality, Attractive and Sustainable Environment --- Maintaining a High Quality,



--- Maintaining a High Quality, Attractive and Sustainable Environment --- Maintaining a High Quality, Attract

Scrutiny Review of Bus Services January 2010



Maintaining a High Quality, Attractive and Sustainable Environment --- Maintaining a High Quality,



--- Maintaining a High Quality, Attractive and Sustainable Environment --- Maintaining a High Quality,
CONTENTS

	Page number
1. Introduction	3
2. Background Information	5
3. Key Issues	14
3.1 Reliability & Punctuality	14
3.2 Routes and Route Planning	17
3.3 Condition of Vehicles	22
3.4 Accessibility	23
3.5 Customer Complaints Procedure	25
3.6 Communication with Arriva	29
3.7 Bus Shelters – and Vandalism	30
3.8 Concessionary Fares	31
3.8 Competition	31
3.9 View of Young People	33
3.10 Increasing Bus Patronage	36
4. Conclusions and Recommendations	38
5. Summary of Recommendations	41
6. Acknowledgements	44
7. Appendix 1 – Community Panel Survey	46

1. INTRODUCTION

We decided to carry out a review of the Bus Service in Telford & Wrekin because Members were aware of concerns raised by ward residents about various aspects of the service and wanted to review how the Council could support improvements to the service for the future.

The review had four main objectives:

- To address immediate and future issues of reliability and quality of provision, and to improve the bus services in Telford & Wrekin
- To review the Quality Bus Partnership between the Council and Arriva
- To identify the needs of Telford & Wrekin with regard to bus services and assess whether the current provision meets these needs
- To change perceptions of the bus services and increase bus patronage.

We have gathered information for this review from a number of sources, including:

- Meetings with, or gathering views in writing from, the Bus Users Group, Senior Citizens' Transport Action Group, the Disability Forum, the Young People's Forum and other young people, the Rural Transport Users' Group, Town and Parish Councils.
- Transport Officers at Telford & Wrekin Council
- Transport Officers at Shropshire Council
- Representatives of Arriva Midlands
- Representatives of National Express West Midlands
- Community Panel survey of bus users and non-bus users
- Legislation including the Local Transport Act, Telford & Wrekin's Local Transport Plan, Disability Discrimination Act 2005, Concessionary Travel Act 2007.

The review coincided with the Transport Review undertaken by the Council's commissioned consultant, Northgate Kendric Ash. The reviews have very different objectives: the scrutiny review focuses on the quality and reliability aspects of the bus service provided by Arriva Midlands as the major operator serving the borough, while the Transport Review focuses on best value improvements and cost efficiencies to be derived from Council owned assets and Council funded services across all wheeled transport. However, there are some areas of common interest which include how the Council communicates with Arriva and the subsidised routes and rural transport issues.

In reading this report, it should also be noted that the people involved in direct face-to-face consultation constitute a small number of overall bus users. The views expressed need to be set in the context of the total number of passengers who are satisfied with the bus service. As is typical with this type of study, people are more likely to come forward with complaints rather than compliments.

Section 2 of this report summarises the information that we have gathered as part of our review. We would like to thank all those people who have taken the time to meet with us. We have made a number of recommendations in Section 3 of the report which we believe will help improve the way the Council and Arriva Midlands can work together to meet the future bus transport needs of residents in the borough. These recommendations will be presented to the Council's Cabinet and to Arriva Midlands at a partnership meeting, and for those recommendations that are accepted by the Council, we will monitor the progress to implement them.

Scrutiny Lead Member

Councillor Roger Aveley

Other Members of Review Group:

Councillor Keith Austin

Councillor Bob Groom

Councillor Terry Kiernan

Councillor Clive Mason

Councillor Hilda Rhodes

Councillor Kuldip Sahota

Scrutiny Co-optee Lynda Baker-Oliver

Scrutiny Co-optee Dag Saunders

Scrutiny Co-optee Maurice Viney

Scrutiny Co-optee Mel Ward

2. BACKGROUND INFORMATION

Telford & Wrekin Council became a unitary authority on 1st April 1998 when it took over the highway and transport functions from Shropshire County Council in the former Wrekin District Council area. Telford & Wrekin has a population of around 158,325 (2001 Census) covering some 112 square miles of which 73% is classified as rural in character. The majority of the population live in urban Telford.

Furthermore, Telford is one of the 29 new growth points announced by the Government in October 2006. For the Council, housing, employment and population growth are seen as vital stimulants to meet the ambitions for Telford, and public transport has a vital role to play in ensuring economic, social and environmental sustainability ambitions are met.

Nationally, buses account for over two thirds of all journeys made by public transport, connecting people to education, employment, leisure, goods and services, friends and family. High-quality bus services can provide an attractive alternative to the private car so buses can contribute to a wide range of local authority goals: tackling social exclusion, supporting a vibrant economy and helping with the fight against climate change.

This supports sub-priority 4 “Improving Access, Mobility and Public Transport” of the Council’s Priority Plan for “Maintaining a High Quality, Attractive and Sustainable Environment”:

- Design and manage a transport network which supports sustainable economic growth and promotes sustainable travel
- Reduce social exclusion and optimise accessibility to local facilities including healthcare, education and employment in Telford Town Centre, Borough Town and the rural area
- Increase public satisfaction levels with public transport

In Telford & Wrekin, Arriva Midlands (known as Arriva in this report) is almost the sole commercial bus operator servicing the borough.

2.1 Regulation of Bus Services

Bus services were de-regulated and taken out of local authority control and into private ownership in 1985. Bus operators are now registered and licensed to operate individual routes and regulated by the Traffic Commissioners, completely outside local authority control. Nationally there are seven Traffic Commissioners appointed by the Secretary of State for Transport who have responsibility in their area for (amongst other things) the registration of local bus services. Any operator meeting the Traffic Commissioner’s requirements can register to operate a route and run the service at their own risk.

Contractual redress for poor performance on commercial routes is done through the Traffic Commissioners. The Traffic Commissioners monitor performance and have powers of enforcement over operators for failure of service, including revoking registrations and licences and

imposing fines. However, these can be blunt instruments. Traffic Commissioners are able to set a fine on the whole company but not on an individual route and often this means that they are reluctant to use this power as it could prohibitively affect the viability of the business. Similarly, they can restrict the operator's licence but this would mean reduced services for passengers. In practice, the Traffic Commissioners are only likely to take remedial action in cases of very severe non-performance.

This is an important point. We found that there is still a prevailing perception amongst some members of the public that the bus services are within Council control when this is not the case.

The position is different on non-commercial routes which are subsidised and contracted out by the Council on a competitive tender basis and are currently operated in Telford & Wrekin by Arriva. Subsidised routes still have to be registered with the Traffic Commissioner, but the authority specifies the routes, times and service frequency, and has powers of sanction for breaches of contract terms.

A major concern for regular and infrequent passengers alike is the punctuality and reliability of services. The reason for poor punctuality may lie either with the bus operator, the local traffic authority (the Council), or a combination of the two. Operators have control over issues such as mechanical problems and staffing issues, but often poor traffic management which is the responsibility of the local traffic authority (such as badly coordinated road works) also contributes to poor performance. Therefore, partnership working is essential to ensuring that passengers have bus services that they can really depend on.

Most authorities manage network and route development/improvement through non-contractual partnership arrangements with operator/s. In Telford & Wrekin this is done through the Quality Bus Partnership which is described in the next section of this report. Under these voluntary arrangements, it is up to the operator to provide a reliable, affordable, high-quality service for passengers and up to the local authority to provide infrastructure such as bus lanes, traffic management, bus shelters and accessible kerbs, dependent on the availability of funding and priorities.

There is no "magic formula" for this, and one of the objectives of the Local Transport Act 2008 has been to try to provide local authorities with a wider range of options to help them meet local people's transport needs.

2.2 The Local Transport Act 2008

The Local Transport Act 2008 lays out various options for working arrangements between local authorities and bus operators:

2.2.1 Voluntary Partnership Agreements

These are voluntary agreements where local authorities and bus operators agree to work in partnership to improve bus services. The local transport authority undertakes to provide particular facilities such as to install new bus lanes, invest in bus shelters or to do other things of benefit to passengers, while the operator undertakes to provide services to a particular standard, to invest in new vehicles and to increase frequencies on particular routes. There are no contractual obligations on either side and effective voluntary partnerships usually depend on strong leadership.

2.2.2 Quality Partnership Schemes (QPS)

A Quality Partnership Scheme is very similar to a Voluntary Partnership Agreement except that the council providing the “facilities” and operators wishing to use those facilities must undertake to provide services to a particular “standard” specified in the scheme. A QPS may have slightly more robust standards than a voluntary agreement, but these are no more legally binding than the voluntary agreements.

In Telford & Wrekin, the **Quality Bus Partnership (QBP)** is the main mechanism for managing the Council’s relationship with Arriva. This fits somewhere between the Voluntary Partnership Agreement and the Quality Partnership Scheme. The QBP was formed in 1999 and enjoyed early success with the development of the Quality Bus Routes funded through the Urban and Rural Bus Challenge. Telford & Wrekin Council, Arriva Midlands and rail companies Wrexham & Shropshire railways, Arriva Midlands North and London Midland are all members of the QBP. There is a loose set of agreements relating to service standards and routes between each party, but these are not legally binding. Consultation with Arriva on the Local Transport Plan happens through the QBP as does the joint Data Quality Sharing agreement and specific consultation around the Bus Punctuality Improvement Partnership (PIP) which was established as a requirement of the Local Transport Plan. Other lines of communication with Arriva are covered later in this report.

2.2.3 Quality Contract Schemes (QCS)

A QCS involves replacing the existing deregulated market with a system of contracts. Under a QCS, the local transport authority specifies the bus services that are to be provided in the area of the scheme, and invites tenders from operators to provide those services under contract. At face value this would appear to give local authorities more clout, but in practice could be prohibitively more expensive and onerous for local authorities to set up and operate and would only be worth considering in a multi-operator area. The QCS would be much less attractive to a commercial operator, and the risk to authorities with a sole incumbent operator is that if the work were to be tendered out, no bidders would come forward.

The Act allows regions to undertake governance reviews and establish Integrated Transport Authorities (ITAs) as a body to govern transport for a particular region/sub-region, and to allow for the establishment of Quality Contracts. A West Midlands Transport Governance Review is currently being led by Centro (the Passenger Transport Executive/Authority for the Metropolitan Area) on behalf of the whole West Midlands region and although the results of the review have not been finally published, prevailing opinion seems to be that it will not recommend any significant changes across the region. This does not preclude authorities working together to look at different governance arrangements in their area.

No authorities in the country have progressed setting up an Integrated Transport Authority yet except for Passenger Transport Authorities in Metropolitan Areas which became ITA's by default in February 2009 as part of the Local Transport Act. The creation of an ITA would not directly give the Council greater powers or control over Arriva (or other operators), and although it would allow Quality Contracts to be established where quality of bus fleet, frequencies etc. are specified, these take a long time to establish and would cost the authority more money rather than less. A Quality Contract may enable the Council to lay out the rules operators would need to abide by to run services along that route, but the operator would have the right to challenge the contract rules. As Arriva operates safe, efficient, compliant buses there would be no gain in pursuing a Quality Contract at this point.

2.3 Development of the Bus Network in Telford & Wrekin

The development of the bus network in Telford & Wrekin was originally part funded by national Urban and Rural Bus Challenge funding. Along with funding from the Local Transport Plan, this enabled Arriva and the Council to work together to develop a series of Quality Bus Routes across the borough. The combined funding covered the procurement of buses, improvements to the highway with bus only lanes and kerb improvements. This "kick-started" the Quality Bus Routes which Arriva took over as fully commercial routes once the market had been sufficiently developed. At this time the Council procured two buses for use on the 76 and 77 routes which are operated by Arriva.

The initial funding meant that the 3% p.a. decline in bus patronage during the 1990s was turned around to a 20% growth from 1999-2006 and the authority won national recognition as a Beacon authority for transport (the only authority to achieve two transport awards) and as a Centre of Excellence for local transport delivery. However, the end of the Urban and Rural Bus Challenge has resulted in a decline in the patronage growth trend in recent years reflecting the lack of investment in routes.

Funding for transport is now allocated nationally to local authorities to deliver Local Transport Plans. This is a statutory document which must be produced by each Local Transport Authority in England. It sets out

the transport policies and programmes of the Local Transport Authority (the Council) and the associated targets and performance indicators over a five-year period.

2.4 Local Transport Plan

Telford & Wrekin is now part way through delivery of its second Local Transport Plan (LTP2) which covers the period 2006-2011. In 2006, the Department for Transport rated the LTP2 as good. It sets out 5 key transport objectives, including improving accessibility to ensure people can reach the services they need, recognising that the ability of people to access places of work, education, health care, shopping, leisure and other opportunities has a real impact on peoples' quality of life.

There are 2 funding strands in the LTP which are for highways maintenance and integrated transport. These have funded improvements to public transport facilities in the borough such as bus only lanes in the town centre, rail station highway improvements, the new Wellington Bus Station, refreshing key quality bus routes in the borough, rolling out the Transportal terminals and providing low-floor accessible facilities at some bus stops. The funding allocations are confirmed in three year settlements and the current settlement period ends in March 2011. The next LTP will be written next year and submitted at the end of 2010. Funding is not allocated for the purchase of new buses as this would not be a sustainable, long-term benefit to the Council.

2.5 Current Bus Services

Bus services in the borough are made up of commercial and non-commercial routes. Arriva currently operates almost all the commercial routes in the borough. The Council funds non-commercial routes either as contracts which are tendered out for bidders to operate on behalf of the Council, or through its own in-house fleet management service which is provide a flexible mix of demand responsive and community buses. Under the Local Transport Act, the Council has a statutory duty to provide services where there is a social necessity but the route is not commercially viable. Across the 112 square miles of Telford and Wrekin, 73% is classified as rural in character. With the vast majority of the population living in the urban area of Telford, providing transport to fulfil the needs of the rural community poses a particular challenge. Services are provided in the following ways:

2.5.1 Commercial routes

Arriva Midlands operates the commercially viable routes, the Quality Bus Routes, as a private operator independent of the Council.

2.5.2 Subsidised routes

Non-commercially viable routes are subsidised by the Council and put out to competitive tender. Arriva currently operates all subsidised routes with the exception of the 701/02/03 school buses which are run by Elcocks. The cost of subsidised services for 2008/09 was £632,867,

including a £120,000 contribution from Children and Young People for the Elcocks service. The subsidised routes are:

- 822 Rodington/Roden
- 76/77 Coalbrookdale
- 66 Wellington to the Town Centre which becomes the 23 and splits for Oakengates
- 44 Madeley/Wellington/Leegomery - night time
- 33 Brookside/Muxton - night time and weekends
- 55 Wellington/Trench/Donnington – night time and weekends
- 11/22 Sutton Hill/Madeley - night time and weekends
- 519 Shrewsbury to Newport (Shropshire pay 36% of the subsidy)
- 341/342 Telford to Market Drayton - Telford & Wrekin Council pays Shropshire County Council 50% of the subsidy.

The commercial and subsidised routes are shown below.

both adults and children with various disabilities to schools and centres around Telford & Wrekin.

- In addition to these core operations other services are provided where access to conventional transport is not easily available in the form of Dial-a-Ride giving people in urban areas access to services such as doctors, dentists and shopping.
- Wrekin Connect serves outlying rural areas providing essential transport links, terminating at key centres such as Telford and Wellington, linking with main line bus services to other towns.
- Twister operates on demand for people living in two zones: Little Wenlock-Wrockwardine and Ercall Magna-Rodington-Waters Upton parishes, terminating at key centres in Telford and Wellington with connections to main bus routes.
- Local Community Buses also provide similar links to Asda, Morrison's, Wellington Baths and district centres such as Oakengates and Madeley.
- Vehicles are also used by youth groups and others affiliated to the council.

2.6 Performance Indicators

BV104: Satisfaction with Local Bus Services

Measured in the Place Survey and the Citizen's Survey

Target	09/10	10/11	11/12	Outturn	06/07	07/08	08/09
	62%	53%	63%		59%	61%	52%

Citizen's Panel Survey, April 2009: Bus Satisfaction

		Base	Gender		Age Group			Disability		Ethnicity		Community Cluster				
		All respondents	Male	Female	18-39	40-59	60+	No LTLI	LTLI	White British	BME (inc. White Other)	Newport	Wellington	Telford North	Telford Central	Telford South
		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
To what extent do you agree or disagree that bus services within Telford & Wrekin meet your travel requirements?	Strongly agree	10	12	8	0	10	11	11	8	10	7	8	10	10	11	13
	Agree	50	51	48	42	49	50	49	53	48	61	54	46	52	53	27
	Neither	20	15	25	50	20	17	20	13	20	17	16	15	26	17	20
	Disagree	13	16	11	8	17	13	15	13	14	10	14	22	6	11	27
	Strongly disagree	5	5	5	0	4	5	4	9	5	2	8	6	3	6	0
	Don't know	2	2	3	0	0	3	2	5	3	2	0	1	3	2	13
<i>Base</i>		<i>282</i>	<i>152</i>	<i>129</i>	<i>11</i>	<i>71</i>	<i>157</i>	<i>199</i>	<i>64</i>	<i>240</i>	<i>41</i>	<i>37</i>	<i>72</i>	<i>94</i>	<i>64</i>	<i>15</i>

N177: Number of local bus passenger journeys

Target	08/09	09/10	10/11	Outturn	07/08	8 month 08/09	Predicted
	6,477,000	6,513,000	6,549,000		6,035,000	4,075,000	6,007,000

National Indicator BV104 (customer satisfaction) in 2007-08 showed that 59% were satisfied with local bus services overall, and 18% were dissatisfied. This figure for 2008-09 is being compiled and is within 0.3% of the average of Telford & Wrekin's family group of comparable authorities, ranking 4th in the group of 14 or 15 authorities.

As part of the review, a survey was conducted with the Community Panel. The results of this are attached as Appendix 1 to this report. In answer to the question "To what extent do you agree or disagree that bus services within Telford & Wrekin meet your travel requirements?" 10% strongly agreed, 50% agreed, 20% neither agreed nor disagreed, 13% disagreed and 5% strongly disagreed and 2% did not know.

Similarly, Arriva undertakes its own annual customer satisfaction survey. The 2008 survey showed that in the UK as a whole, 61% were either satisfied or extremely satisfied with the service and in Telford & Wrekin this figure was 59% which is inline with our own Community Panel Survey.

2.7 Transport Review

The scrutiny review coincided with the Transport Review undertaken by the Council's appointed service review partners Northgate Kendric Ash. The terms of reference for the Transport Review are to recommend service efficiency improvements and value for money savings that could be made from Council funded/run provision, largely around integrated transport, adult and children's social care, schools transport, community transport, bus subsidies, transport information and management of transport. The scope of the review did not include a qualitative analysis of the commercial service operated by Arriva Midlands which is the main focus of the scrutiny review.

The two reviews are therefore not in conflict. The recommendations of the Transport Review will take time to implement, and the scrutiny Members will be consulted on the development and implementation of recommendations so that evidence gathered as part of the scrutiny review will be fed in as actions are progressed.

3. KEY ISSUES

As part of the review, we consulted a number of bus user groups to explore their views of the bus service. These included:

- The Bus Users Group
- The Senior Citizens' Transport Action Group
- The Disability Forum
- The Young People's Forum, and wider work through the Active Involvement Service
- The Rural Transport Users' Group
- Town and Parish Councils

Additionally, we conducted a Community Panel survey of bus users and non-users to get a broader view of public opinion from a wider sample.

Inevitably with this type of review, there were some common themes that emerged, but there was also a large amount of anecdotal evidence put forward about individual experiences which could be "one-off" occurrences affecting a particular passenger at a particular time, and not symptomatic of a wider spread issue. It should also be borne in mind that the user groups consulted may represent bus users with specific needs and interests, and these need to be set in the wider context of the Community Panel survey as representing a wider cross-section of the bus user community.

3.1 Reliability and Punctuality

Reliability and punctuality were issues raised by all groups consulted, with comments about buses not sticking to timetables, running early or late and missing out parts of routes. The 55 route was adversely disrupted by road works during 2008 and this is reflected in the comments we received.

There are 2 national indicators relating to reliability and punctuality which both show an improvement for 2008-09 compared to 2007-08.

N178: Bus services running on time (non-frequent services on-time)

07/08	08/09
76% average	80.5% average

N178b Bus Services running on time – excess waiting

07/08	08/09
1.72 min average	1.04 min average

Comments of Consultees

- Changes to services are not publicised so people cannot rely on the service e.g. No. 55, Trench.

- Scheduled buses were noted as missing from routes 55, 22, 33 in July 2008
- There were various issues of unreliability with 66, 55, 44, 481 routes and overcrowding in the morning
- A Member had received many complaints about the 55 from residents.
- The last 55 bus did not arrive one day and a Member had to take a taxi home.
- The 55 to the hospital is not reliable.
- 55 route still poor and missing parts of the route. (Lilleshall & Donnington)
- 55 misses out part of the route. (Lawley & Overdale)
- The 55 is not a good or reliable bus route.
- There have been problems with the 44 and 55 routes, especially with the road works caused by the gas works.
- The 44 is an excellent service although there can be long waits in the town centre. A through route to the hospital is needed.
- Buses don't run to timetable - run late and leave early and people can miss connections. (Lawley & Overdale)
- Services do not always stick to the published timetable or can be taken off altogether. There is often a problem with the 33 on a Saturday at 5.30pm. Problems are exacerbated by road works.
- A bus was missed at 7.04pm on 14/03/09 from Ainsdale Drive because it left 4 minutes ahead of the scheduled timetable.
- The 99 service is bad when the route is not congested
- A 22 from Sutton Hill running 10 minutes late changed route when the bus following caught it up.
- Drivers unhelpful and timetables are not kept to
- The 481 constantly fails to call in at Lamb Corner, Wrockwardine Wood leaving passengers waiting. There have been problems with this service for several years despite letters of complaint to Arriva.
- The 33 & 44 are very good, the 481 is faster and reliable.
- The 44 is an excellent service (although there can be long waits in the town centre)
- The 44 bus from the Town Centre does not always stop at the railway station
- The Donnington bus is usually very punctual
- No notification of bus stop closure during road-works
- Buses leave stops early
- Buses pull into and depart from the wrong bays at the bus station without an announcement being made.

Community Panel Survey Results:

The overall results of the Community Panel survey on punctuality showed generally good levels of satisfaction.

- "How do you rate the punctuality of the buses in general?"

Very good	30%
Good	46%

Neither good nor poor	17%
Poor	4%
Very poor	3%
Base	273

- “In an average week, how often, if any, do buses run late?”

Never	5%
Almost never	27%
Sometimes	39%
Most of the time	7%
All of the time	1%
Don't know	21%
Base	270
- “What is the average length of time you have to wait for the delayed bus?”

Less than 5 minutes	26%
5-10 minutes	49%
10-20 minutes	19%
20-30 minutes	5%
30 minutes - 1 hour	1%
Base	193

Comments from Arriva

During 2008 services overall were not as reliable as they could have been. Arriva failed to operate 1% of their mileage which although a low percentage, is a large number of journeys given the number of frequency of bus routes in Telford. Arriva shares the same aims as the Council and Councillors for the local bus services – to move people around as efficiently and cheaply as possible, and there is a joint responsibility to do this.

There are a number of factors that contributed to the poor reliability and they are not all within the control of Arriva. For example, there were an inordinate amount of road works by utilities companies in Telford during 2008-09 which have disrupted services. Route 55 was particularly disrupted by road works which meant the buses could not adhere to the usual frequency.

Arriva feels that the Council is very poor at providing them with advance notification of road works which makes it difficult for Arriva to plan in advance to mitigate disruption. The utility companies must inform the Council of their work, but the Council rarely passes this information on. Other authorities are much better at providing advance notification. As an example, the traffic lights on route 55 were meant to be in operation for only part of the day, but this was not enforced by the Council so the lights operated all day and led to more delays than necessary. Arriva was also given 3 separate dates when the road works would be finished which made planning for resuming normal

service difficult. Arriva acknowledged that there had been a bad patch with the 55 but all the issues had been resolved and the service is now running well.

Reliability was also affected by an acute driver shortage mid-year in 2008. Some temporary drivers were brought in from other areas to cover the shortage where possible. Drivers work on 1 week notice, but it takes 8 weeks to train new drivers. This situation has now stabilised and there are no staffing or recruitment problems in the current climate so the workforce is expected to be much more stable in the coming year.

In 9 out of 10 cases non-arrival of a bus is due to breakdown, and in these cases buses are not taken off a route to replace the broken vehicle but are replaced by buses standing in the bus station to minimise further disruption.

There are problems with vandalism in some areas, including vandalism of bus stops but also towards and on buses e.g. bricks thrown through bus windows. For example in March 2009, there were 2 instances of bricks thrown through bus windows in Woodside, one resulting in the hospitalisation of the driver. This meant these buses were not available on that day, and that we were a driver short for a period of time. Vandalism is not tolerated on buses, and by the end of the year, all vehicles will be equipped with CCTV, but there needs to be a better level of management of vandalism in the urban areas of Telford.

3.2 Routes and route planning

There were various issues raised about routes and route planning by people interviewed. The scope of the review did not by any means include a detailed analysis of gaps or potential markets for services, but does provide a snap shot of public opinion as to where the people interviewed would like to see more or different services.

Arriva is currently undertaking a route review and developing proposals for a new network which will come into force in Spring 2010. As a commercial operator, there is an imperative for Arriva to review the routes as a commercial exercise, although as some of the routes are subsidised, the Council has some influence over those routes. 80% of services that Arriva run are commercial services in the more urban areas with the highest passenger numbers and the most frequent journeys. The remaining 20% are rural services, mostly supported by Telford & Wrekin and Shropshire Councils. Arriva will look for assistance to provide services to rural areas where the population is insufficient to sustain the service.

The issue with the subsidised services is that they try to do everything for everybody which means that passengers on the current routes can take a very long time to get to their destination. Historically, the subsidised routes have been tendered out to replace like with like, but

a more strategic approach is now being taken with the development of a Subsidised Bus strategy. The idea is to straighten routes out (the 66/76 and 77 for example) so that they can be developed and taken over as commercially viable routes, and to make sure the west of Telford as a population growth point is serviced. Performance indicators for proximity to bus routes need to be met, and where the Council is unable to provide a subsidised route it works with parish councils to run community buses using the Council's fleet during downtime.

The comments and information gathered during the course of this review will be presented to officers in Transport and to Arriva to feed into Arriva's route review and the development of the business case for the Council's demand responsive services for rural areas.

Summary of comments:

- There is a perception of a lack of regular through-services to the hospital and the railway station especially from changes to the 55 service. In fact the 44 runs every 10 minutes to the hospital and all the Quality Bus Routes call at Telford Central.
- There is a lack of services in rural areas.
- There is a need for more Sunday and later services.
- There is a need for a more joined-up approach between regeneration, planning and transport so that the transport infrastructure is properly integrated into new developments, especially developing a Quality Bus Route on the west of Telford where housing growth is happening.

Specific points raised:

Hospital and rail station services

- Loss of the 55 service to the hospital
- Services to the hospital. Changes to the 55 service have made travel to the hospital much more difficult for residents of Hadley, Trench, Donnington and beyond
- Very poor service to PRH with passengers having to catch two buses
- Lack of a direct service between Shifnal and Newport to PRH
- A more frequent 55 service when attending appointments at the hospital
- Reconsider bus access to PRH
- Direct routes to PRH
- A direct bus service to both PRH and RSH
- The 55 does not always stop at the railway station
- The 55 Sunday service should run at least every hour

Sunday and evening services

- There is no bus service after 11.00pm for people going out or working late shifts in the town centre
- There are not enough Sunday services

- Perhaps a need for a later bus service after 10.45 to serve shift workers
- More buses on Sundays and bank holidays
- More early morning/late evening buses
- 33 route not fully served in the evenings or on Sundays
- The 66 does not start early enough
- Insufficient Sunday service from Priorslee

Rural services

- In the longer-term, bus routes need to be planned to service new residential developments and demographic changes
- Problem for college & university students who live in rural areas have problems accessing transport, and there are inflexible hours.
- Rural areas lack bus services
- Rodington is not very well served by bus services but the recent introduction of the New Twister Bus has gone some way to solving some of the problems.
- Rodington Parish Council recently made representations to have the 519 service diverted from Haughton Cross Roads through Somerwood to Sunningdale, and to then take the 822 service route back up to Roden to continue its journey on its original Route. This would provide a passenger catchment of Drury Lane, Somerwood, Rodington Heath and Rodington Village, with only an additional extra less than 2 route miles. This suggestion was rejected by Arriva on the basis that the lane used by the 822 was too narrow and it would cause passengers from Roden to have to walk to the corner of the lane rather than have a direct service. The population of the Rodington far exceeds that of Roden so we think this suggestion needs further investigation
- WR69 service to start at 10.43 instead of 11.43 at New Works
- WR69 to stop at Wrekin Retail Park (Wellington) for all runs or at a minimum on a Tuesday or a Friday.
- Twister service from Little Wenlock to call at Wrekin Retail Park
- Service to and from Ironbridge is too limited
- Poor service from Dothill
- No buses to Halesfield
- Not enough buses from Horsehay to Telford Town Centre
- A service from Leegomery to Donnington
- Earlier buses and connections to Much Wenlock

Route planning and infrastructure

- We need to look at providing routes on the west of Telford, greener buses etc. This will contribute to the Council's climate change agenda.
- We need to invest in public transport in order to ensure sustainable transport is the key to accessing the new town centre and ensure that there is a high quality bus station in a key location in the new town centre.

- We need to develop a quality bus route in the west of Telford to serve Lawley and Lightmoor and improve access to Ironbridge and the World heritage site
- Bus routes need to be planned alongside the Town Centre and Borough Town developments
- There are issues around transport planning and housing developments in Telford & Wrekin that need to be addressed. Old estates such as Sutton Hill are not suited to bus provision as residents have to walk to the ring road around the estate to get to a bus stop. New developments also seem to be designed around cul-de-sacs leading off a central spine road, for example in Lawley, which makes bus routes less easily accessible for residents
- The Sutton Hill service only runs anti-clockwise so people cannot get to the surgery. Residents have been told by Arriva that they will not change this as it would be too dangerous for people crossing the road to get to the bus stop on the opposite side
- Lack of a direct service from Sutton Hill to Telford Town Centre
- With the new Lawley Square in development and suggestions about bringing in a bus link to Lawley from Horeshay & Lightmoor we have yet to see hard evidence of a terminus being incorporated into the plan. We need more joined up thinking from planning, regeneration etc. to get the infrastructure correct from the offset.
- Lack of services between residential areas and main industrial areas.

Cross border services

- Poor service from Rodington to Telford and Shrewsbury. Problem for Rodington/Roden residents wishing to travel to Shrewsbury. Most people drive to the Park and Ride, but many elderly residents cannot drive. The only Bus Service is the 519 from Roden, a walk of 1.5 + miles along country lanes. The first bus of the day, the 822 to Telford is at 1103 and takes an hour to arrive at Telford. If the 0910 service starting from Roden was extended to start from Rodington then this would provide an additional service. No services from the village in the evenings either by the Twister or the 822 service.
- Cross-boundary co-operation to provide a service to Shrewsbury is needed.
- More direct services from Wellington, Services to Shrewsbury and Newport are very difficult, and more timetables should be available in Wellington
- More regular Newport-Shrewsbury service
- Regular service from Wellington to Shrewsbury

Other

- There is no service to the crematorium in Priorslee
- 44 is a good service but some have been taken off
- Residents have to catch 2 buses to get into Wellington from the Dawley Bank area when the bus travels down the adjacent West

Centre Way where no residents live, but this happens to be the quickest route

- Trench is well served but some areas of Ketley only have 2 buses a day
- The 33 should go to Brookside on Sundays so that the 11 is not crowded
- Have the 33 go through Brookside on a Sunday
- No direct route from Leegomery to Hadley
- Better service for West Street, St Georges as it finishes at 2pm
- Better services from Dawley
- Better services to Edgmond
- Later buses back to Newport when AFC Telford are playing at home

Community Panel Survey Results

The Community Panel Survey asked several questions about the kind of journeys that passengers make and the convenience of the routes.

The overwhelming majority of bus journeys made by Community Panel members are for leisure purposes with relatively small numbers using the bus on a regular basis.

- What journeys do you make on the bus?

For leisure	90%
To work	17%
To college	3% (the survey audience was over age 18)

Base

- How often do you use the bus?

Daily	4%
Several times a week	13%
Less than once a week	12%
Less than once a month	17%
Not in the last 12 months	55%
Base	617

Most journeys (77%) were made on weekdays off-peak, most regular journeys (83%) were on a direct route with most (58%) having a service at intervals of 20 minutes or less. In response to the question “Does the bus timetable coincide with when you want / need to travel?” 80% relied yes.

In response to the question for non-bus users “Why did you stop using the bus service?” out of 203 people who gave a reason, 57 said because the journey time is too slow, 28 said their required route is not available, 31 said there is a lack of a direct service and 57 said that alternative forms of transport are more convenient.

3.3 Condition of the Vehicles

The review found that the condition and cleanliness of vehicles was an issue for bus users, and that there is a perception that the fleet in Telford & Wrekin is older than in other areas.

Some typical comments made to the Members were:

- The bus fleet in Telford & Wrekin seems to be older than in other areas
- The 33 is one of the main routes through Donnington but uses very old vehicles
- Cleanliness and litter is a problem on some buses particularly after school runs. Examples of chewing gum and an orange on seats were given
- It was noted that there are no litter bins on the buses
- Cleanliness is generally poor with a lot of litter on the buses

It was however acknowledged that litter on buses is not only a matter for Arriva, but one of wider public responsibility for keeping the buses clean and the culture of litter dropping is largely to blame. It was acknowledged that the turnaround of buses makes cleaning difficult, and that drivers cannot watch passengers as they need to concentrate on the road, and not all parts of the bus are visible in the driver's mirror.

Community Panel Survey Results

In reply to the question in the Community Panel Survey "If you could improve one thing about the bus service, what would it be?" 21 people out of 252 cited cleaner buses and in better repair.

In terms of comfort and cleanliness of the buses, the results of the Community Panel Survey showed that the majority of respondents rated each as good as follows:

- "How do you rate the overall comfort of the buses?"

Very good	7%
Good	45%
Neither good nor poor	32%
Poor	13%
Very poor	2%
Don't know	1%
Base	273
- "How do you the overall cleanliness of the buses?"

Very good	6%
Good	40%
Poor	16%
Very poor	6%
Don't know	1%
Base	270

Comments from Arriva

Arriva undertakes annual surveys of passengers and the main issues that come out of this are punctuality and reliability. The quality of buses does not appear to be a high priority for customers, based on these surveys. Older vehicles can be as reliable, or more reliable, than new models, so the age of the vehicles being used in Telford is not an issue. The average age of Arriva fleets in the Midlands is 7.5 years, and the majority of the Telford fleet are 6 years old. The normal lifespan of a bus is 15 years.

The buses are cleaned externally and internally each night, however, as they are out for at least 10 hours each day they do become dirty again during the day. A deep clean is carried out every 6 months. Maintaining cleanliness inside the vehicles also relies on passengers, and the worst times are after the school runs. A trial is being run with a cleaner in depots doing a sweep-out after school runs.

During the 15 year life of a vehicle the seats will be replaced about 3 times, and will always be replaced if they are worn or damaged as it is an offence for the vehicle to be on the road with a damaged seat.

Arriva has just introduced 5 new vehicles on the Wolverhampton-Telford-Shrewsbury route and is planning to introduce a number of additional new vehicles in the near future. Investment in new stock is difficult in the current economic climate. Any future investment in new vehicles will need to be thoroughly researched and justified, and Arriva would hope to see similar investment from the local authority in relation to the roadside infrastructure, bus priority measures etc. to ensure the network review is a success.

Views of an alternative operator about the vehicle life-cycle

As part of the review, we met representatives from National Express West Midlands to get the views of another operator on a number of issues. From their point of view, the average life cycle of a bus (to make a profit) is 12-15 years and the average target age for buses is 8 years. In their experience, the public is more concerned about cleanliness and security than the age of a bus. National Express West Midlands currently has only 100 out of 1700 buses left that are at the end of their life span and these are all about to be decommissioned and replaced. During the life of a bus, engine parts, chassis and furniture can be replaced to upgrade the bus. All 2000/01 buses have undergone a complete upgrade over the last 2 years.

3.4 Accessibility

As part of the review Members met with groups of bus users including the elderly and people with mobility issues who may have particular needs in relation to accessing public transport.

A key problem for elderly, disabled and people with mobility issues is getting onto buses with steps. Between 70-80% of the fleet is now low floor, but there are still some old buses with steps in use. Problems

usually occur when a bus breaks down and the older vehicles with high steps are used as replacement buses. Members heard reports of old buses being used on the 11, 22, 23, 24, 25, 33, 76, 77 and 99 routes. Of these, the 76 and 77 are fully subsidised and Council owned, and the 11, 22 and 33 are partially subsidised at night times and weekends.

The following issues for elderly people, people with push chairs and people with disabilities or mobility issues were raised:

- Space allocated for push-chairs and wheelchairs is often fully occupied by push-chairs, making the bus inaccessible for other push-chair or wheelchair users further down the route. There was anecdotal evidence about a wheelchair user being left at a bus stop because the allocated space was occupied by push-chairs, and another incident of a bus driving past a stop where a wheelchair user was waiting, possibly because it was already full of buggies.
- High steps are difficult for disabled people, parents with push-chairs, elderly and less mobile people.
- Drivers sometimes pull off before elderly and less able passengers are seated.
- There was a lack of clarity about whether mobility scooters are allowed on the buses, and it was suggested that there should be clear instructions about this on the buses.
- Overcrowded buses (such as school and college buses) can be a deterrent to disabled people
- There is an issue with high kerbs in Donnington which means some people cannot get onto the pavement
- There was a mixed view about the helpfulness of drivers towards disabled people
- Stops are not announced for blind people, the timetable is only available in print and there is often no room for guide dogs on the old buses
- There is no pick-up/drop-off point at the bus station for blue badge holders

Community Panel Survey

- Of 280 respondents, 10% travelled often or sometimes with a buggy
- Of the 29 respondent who travel with a buggy, 58% found it easy or very easy to get on the bus with a buggy
- Out of 30 respondents who travel with a buggy, 80% had often or occasionally not been able to get on the bus because of lack of space for the buggy
- There were 52 out of 272 respondents with a disability or mobility issue, or with care responsibility for someone with a disability or mobility issue.
- Of these 52 respondents, 66% thought low steps would make travel easier, 11% said a bus stop nearer to home would make travel easier, 18% wanted more help from the driver to get on and off and 23% wanted dedicated seats near the door.

Government legislation requires bus operators to have 50% low floor, accessible buses by 2010 and all buses to be fully compliant by 2016.

Comments from Arriva

Arriva has already exceeded this requirement. 70% of the fleet is low-floor and this will increase to 80% by the end of 2009 and to nearly 100% by the end of 2010, well ahead of national targets. This is ahead of national government targets. Accessible vehicles are used as much as possible, with step vehicles filling in where necessary e.g. if other vehicles are temporarily out of action.

As parents with children are the 3rd biggest market for Arriva, they are concerned with their needs as passengers. However, this must be balanced with the needs of other passengers. Drivers are trained to ask passengers to fold up buggies to make way for wheelchair users, but this relies on the goodwill of the public. It can be frustrating if parents refuse to collapse their pushchairs and drivers must ask wheelchair users to wait for the next bus. The able elderly are the largest market, and they can experience difficulty in getting through the wheelchair and pushchairs at the front of the vehicles to the seats. Drivers should not move off before passengers are seated, but they may do so if it takes a long time for the passenger to sit down, as waiting would delay the timetable.

On the subsidised routes, the Council will get quotes from bidders for low-floor / new buses, but there is an issue with resources as newer stock carries a cost and there has been no budget for this.

We have not made a specific recommendation about accessibility as this is down to investment in new vehicles and Arriva is already ahead of government targets for introducing compliant buses. There may be additional training that could be undertaken with drivers to make them more aware of the issues for older, less mobile and disabled people so that additional care of their needs is taken.

3.5 Customer service and customer complaints

The review found 2 issues relating to customer service:

- Bus drivers' attitudes
- Arriva's customer complaints procedure

3.5.1 Bus Drivers

There were mixed views about bus drivers' helpfulness with both positive and negative comments. Most of the negative comments were about drivers not being helpful towards less able bus users by finding them space on the bus, drivers pulling off from stops before less able people are seated and some comments about general levels of courtesy. Some typical comments received were:

- Scrutiny Members had received complaints from ward residents about driver attitudes
- Members of the Disability Forum had experienced drivers pulling off too quickly before they were seated which could cause falls
- The Disability Forum commented that some drivers are very helpful but some are not helpful at all
- Some bus drivers are surly and unhelpful
- We need patient and courteous drivers
- We need bus drivers to be more polite
- Drivers do not drive smoothly
- A blind passenger had tried asking drivers to tell her when the bus had arrived at her stop, but if she is travelling more than a couple of stops the drivers tend to forget.

There were equally some positive comments:

- (Some) bus drivers are polite
- The politeness and helpfulness of fleet bus drivers was commented on very favourably by Little Wenlock Parish Council
- It is not drivers but the design of buggies and the attitude of the public that creates problems.

Community Panel Survey Results

The Community Panel survey showed quite favourable opinions about drivers.

- “To what extent do you agree or disagree:
Bus drivers are generally considerate of passenger safety and comfort?”

Strongly agree	18%
Agree	50%
Neither agree nor disagree	19%
Disagree	10%
Strongly disagree	1%
Don't know	1%
Base	278
- “To what extent do you agree or disagree:
Bus drivers are generally friendly and helpful?”

Strongly agree	21%
Agree	47%
Neither agree nor disagree	19%
Disagree	9%
Strongly disagree	3%
Don't know	1%
Base	277

Comments from Arriva

There are 1500 drivers on the fleet and there may be some who do not do the job properly but if they are found out, it is taken very seriously

and the issue addressed as poor driver attitudes or behaviour gives Arriva a poor reputation.

With regard to helping wheelchair users onto buses, all the driver can do is ask people occupying the space to move or to fold up their buggies, but it is up to the passengers to co-operate and if they refuse then there is nothing more that the driver can do. This can be difficult when there is no other space available.

National Express West Midlands made a similar point. Their drivers are trained to ask people with buggies to fold them up to get on or they may have to wait for the next bus. Drivers will ask people to move to enable wheelchair users to get on, but it is up to the public as to whether they move.

Suggestion for Arriva resulting from the review

Although not included as a recommendation in this report, witnesses interviewed suggested that Arriva consider prioritising wheelchair users for the disabled space over people with buggies which can be folded up, and encouraging drivers to make this a priority.

3.5.2 Customer complaints procedure

There was some speculation about Arriva's response to complaints, how thoroughly complaints are investigated, and the perception that a common response by Arriva is to deny the legitimacy of complaints. An example was given about a complaint about the non-arrival of a bus which Arriva had denied.

We did do an assessment of a sample number of complaints to draw any conclusions about the level of complaints and how they are dealt with, but did gather some anecdotal and written evidence of specific complaints which were not considered to have been satisfactorily managed.

The Senior Citizen's Transport Action Group provided a file documenting the progress of a number of complaints about the bus service and bus stations which had been variously addressed to Arriva, Telford & Wrekin Council, Telford & Wrekin PCT and to national government.

The group considered Arriva's response to the complaints unsatisfactory. There are often long delays, initial letters of complaint had not been replied to and follow-up letters had provoked letters of denial from Arriva about having received the original complaint. If pursued, complaints then appear to be dispersed to various staff at Arriva to deal with. One resident had received 3 separate replies to one complaint. One complaint had been escalated to the Commercial Manager in the West Midlands, who replied by referring the complaint back to the complaints department. When decisions are taken, they do not seem to be applied consistently across the whole organisation.

The Group further said there had been a problem with Arriva not attending public meetings about the bus service. Arriva had been invited to residents meetings in Sutton Hill and Wrockwardine, but had not attended. Regular staff changes at Arriva appeared to have made the complaints process more difficult as there had been no continuity or named point of contact.

Arriva also has an on-line complaints procedure, and although we did not receive any feedback on this, one of the Members had been onto the site and felt it was not very user-friendly and it was not clear whether a record of what had been sent could be saved by the user.

Comments from Arriva

The Arriva annual customer survey is undertaken across the UK every October. The survey is conducted face-to-face on buses by an independent market research company. Around 19,000 customers are surveyed nationally, and the results are given on a depot by depot basis. The survey covers punctuality, reliability, driver attitudes, and some areas that lie within the remit of the local authority such as the standard and security of bus stops and the pathways leading to them – the “whole journey experience”.

The 2008 survey showed that in the UK as a whole, 61% were either satisfied or extremely satisfied with the service. In Telford & Wrekin, this figure was 59%. Although there is clearly room for improvement, these results do challenge the perception that all Arriva users are dissatisfied with the service.

Complaints are taken seriously and investigated. In 2008, 16 complaints were made about the service in Telford & Wrekin out of a passenger number of around 100,000. It is recognised that in addition to these complaints, there are likely to be other people who complain to friends, family, Councillors etc. but do not make a formal complaint. Complaints are monitored by way of monthly reports.

It is important that people making complaints are specific, giving the date, time and route of the bus, to enable Arriva to investigate the complaint adequately and provide a conclusive answer. CCTV footage can be checked as part of the investigation.

Arriva has recognised the need to standardise the complaints procedure and to have consistent systems in place. To achieve this, Arriva has opened two new call centres in Luton and Liverpool to handle complaints nationally within corporate guidelines. From 1st April complaints for Telford & Wrekin have been handled by the Luton call centre with a target four day response time.

Comments from Shropshire Council Transport Officers

As part of the review, we met Transport officers from Shropshire Council to find out more about their experience of Arriva as a local operator. Their view is that although the Council receives complaints

about bus services, there proportionately fewer about Arriva than there are about the other smaller operators. Generally, Arriva is able to provide a better service because unlike the smaller operators it has the support infrastructure that a major operator is able to provide.

The Council's role in complaints about the bus service

As outlined in section 2.1 of this report, bus services were de-regulated and taken into private ownership in 1985. Since then, bus operators have been the responsibility of the Traffic Commissioners and not the local authorities.

Essentially, the Council has no direct power over Arriva and there is no contractual mechanism for redress of performance on commercial routes. The Council can try to negotiate with Arriva and the national indicators for reliability (frequency) and punctuality (1 minute before and 4 minutes after) can help when making representations to them. By working in partnership with Arriva, the Council can indirectly support improvements to the network through improvements to the infrastructure such as bus shelters, bus stations, kerb improvements, bus lanes and traffic management.

Currently, the Council issues complaint forms to residents and sign-posts customers to the Traffic Commissioner. Complaints are submitted directly to Arriva so that the Council does not record or monitor complaints. It is made clear to the public that the Council only has powers of sanction on the subsidised routes and none at all on the commercial routes. Arriva ask for tickets to be submitted with complaints forms, and residents are made aware that they should also keep a copy of the ticket for their own records.

On the tendered routes, an industry standard contract is used which allows the Council to charge a set administration fee or stop a day's subsidy for breach of the contract for poor performance and this has been imposed occasionally.

3.6 Communication with Arriva

As previously noted, there is no contract in place between the Council and Arriva with the exception of the subsidised routes. We wanted to find out how the Council works in partnership with Arriva and whether anything could be done to improve the partnership.

The Council has several levels of engagement with Arriva:

- The Quality Bus Partnership
- Council organised groups
- Day-to day officer involvement

3.6.1 The Quality Bus Partnership

This is the main mechanism for formal consultation with Arriva over strategic partnership issues and is described in section 2.2.2 of this report. The Quality Bus Partnership has been extremely successful

since it was formed in 1999. The availability of government funding through Urban and Rural Bus challenges enabled the council and Arriva to work together to improve bus routes in the borough turning around a 3% p.a. decline in bus patronage during the 1990s to a 20% growth 1999-2006. The impetus of the QBP changed as the grant funding came to an end and there was no money to support joint working. But the QBP remains active. Arriva provided 5 new buses this year on the Wolverhampton-Telford-Shrewsbury route, and a number of additional new buses are anticipated in Telford in the near future. Transport officers said that discussions at the partnership meetings have contributed to the investment decisions.

Arriva has made the Council aware of the route review at the partnership meetings and have undergone consultation with various officers in Transport. We should be mindful of the fact that the review is a commercial exercise and that there is no obligation on Arriva's part to consult with or take account of the Council's views. It is important for the Council to have a good relationship with Arriva to be able to plan and balance the commercial routes with the subsidised routes, but it has to be accepted that Arriva is an independent commercial operator.

3.6.2 Council organised groups

The Council facilitates a number of groups where members of the public can meet to discuss issues relating to buses and public transport. These include the Bus User Group, the Rural Transport User Group, the Disability Forum and the Senior Citizen's Transport Action Group.

Arriva is invited to the quarterly Bus User Group meetings and a representative at depot level usually attends. The group has become a useful forum for raising issues and having a dialogue with Arriva, and is gathering momentum. Issues with Lamb Corner, the 55 service, the bus station and other infrastructure problems have started at the forum and have been successfully resolved. There had been an issue with the consistency of Arriva staff attending the Bus User Group due to staffing changes at Arriva, but according to Transport officers this is now improving. Arriva has tried to resolve the issue of stability with the appointment of a new General manager in June 2009 and of 2 Assistant Managers covering north Shropshire/Oswestry and Wellington.

We noted that there was not always consistency of communication between the various groups and Arriva staff, and no single point of contact between the groups and Arriva and we felt this would make communication more effective.

3.7 Bus Shelters - and Vandalism

We received a number of complaints from bus users, and from Arriva, about bus shelters being in poor condition or vandalised. The quality of roadside facilities – bus shelters, timetable information display,

pavements – are all part of the “whole journey experience”, and these need to be of a good standard to attract people onto the buses.

The local authority is responsible for maintaining and upgrading bus shelters and other roadside facilities. The problem is that there is no council budget allocated for this. Currently, Transport officers work with the Parish councils to upgrade and improve bus shelters using Parish council funding. There is much work being done to vandal-proof bus shelters, but more needs to be done. Funding is secured through LTP2 and this may address the maintenance issues.

Vandalism does not only affect bus shelters. There are serious incidents of vandalism on, and towards, the buses, such as bricks thrown through bus windows. In March 2009, we received evidence from Arriva of an incident, the second that week, of a brick being thrown through a bus window in Woodside resulting in the driver being hospitalised and the potential suspension of the service. Arriva does not tolerate vandalism on buses and by the end of the year all vehicles will be equipped with CCTV. Clearly, vandalism is part of a much bigger problem of anti-social behaviour which is outside the remit of this scrutiny report.

3.7 Concessionary Fares

In England, people over 60 or with a disability as stated by the Department for Transport are eligible for a concessionary bus card which entitles them to free travel between certain hours anywhere in England on local buses. The scheme is funded nationally for journeys made between 9.30am-11.00pm. Local authorities have discretion to extend the free hours of travel, but if they chose to do this then the local authority must subsidise all journeys made outside the nationally specified hours. In Telford & Wrekin, the concessionary travel time was extended from 9.30am to 9.00am in March 2009 at an annual estimated cost to the authority of around £170,000. Other options are available as part of the concessionary fare scheme.

Operators (including Arriva) re-charge a flat fare which is agreed with each transport authority annually and is based on an average fare formula.

3.8 Competition

There was speculation about the quality of the service provided by Arriva compared to services available from other operators in other local authority areas. Arriva is currently the sole operator in Telford & Wrekin, and there was a perception that if another operator could be attracted into the borough, the increased competition would stimulate improved service levels. This raises two questions: what is required to attract an alternative operator/s into the area, and would more operators make a difference to the service?

3.8.1 Attracting other operators into Telford & Wrekin

The sole operator situation in Telford and Wrekin is not unusual in similar sized towns outside a metropolitan area where the commercial market is too small and compact to sustain more than one operator.

The subsidised routes are put out to open tender through OJEU and can be offered to any bidder but in Telford & Wrekin, Arriva is usually the sole bidder. The problem with attracting a major operator into the borough is that the contracts tendered are too small in value to justify the necessary investment in a depot and staff that an alternative operator would need to make to move into the area.

We met representatives from National Express West Midlands (NEWM) to find out what the barriers are for outside operators to bidding for contracts in Telford & Wrekin. NEWM is always looking at areas where it can grow the market. The market in Telford (and similar towns such as Lichfield and Tamworth) has been looked at in detail, but there are challenges with the size of the market and being able to move into it quickly enough. From their point of view, there is better potential for more rapid growth in the West Midlands.

The problem is that the tender market comes out on a route-by-route basis and NEWM cannot submit a competitive price on such small contracts. The nearest NEWM depot is in Wolverhampton, 15-20 miles away, and operating in Telford would mean setting up a local depot to maintain and overnight buses and recruiting new staff. To make a tender economically viable for a new operator moving into the market, the council would need to offer a big enough package of work for a long enough period and with a long enough lead time. The lead time from award of contract to starting operation is around 9 months. The contract would need to be for a minimum of 30 buses and for at least 5 years to make the required investment in Telford a viable option for outside bidders. The total value of the subsidised routes in 2008/09 in Telford & Wrekin was £632,867 and this is contracted on a route-by-route basis, although they are all up for tender in October 2010.

The Transport Review looked at how to use tender processes to encourage bidders and competition. Transport officers felt that an option could be to advertise tenders at the same time as Shropshire Council to encourage other operators to tender for services in both authority areas, and the Park & Ride contract may provide an opportunity to do this, although a joint contract is unlikely as the timing of contracts will constrain this.

3.8.2 Multi-operator services

We met Transport officers from Shropshire Council to compare its experience as an authority with more than one operator. There are a number of commercial operators working in Shropshire, although Arriva is by far the biggest operator and predominantly covers the Shrewsbury Town area while the smaller operators tend to operate more rural

services. As commercial operators, the companies themselves determine the commercial network. In addition to the commercial and subsidised routes, there are 140 school buses virtually all of which are run by smaller independents, and Arriva is not involved with these.

We asked how Shropshire Council encourages more operators to bid for contracts to improve competition. Procurement (as in Telford & Wrekin) is undertaken using the OJEU framework and complies with EU regulations including advertising all tenders. Operators are made aware of new opportunities coming up in advance, and e-procurement and web based technology has digitised and simplified the process to encourage bids from smaller companies without a large infrastructure and back-office staff. Market building is done by visiting operator forums to help operators understand the opportunities better and to stimulate interest in new markets such as school routes, although there is a shrinking number of independent bidders. Telford & Wrekin has been using e-procurement for 12 months, although as mentioned previously, in the smaller market, this has not helped to bring forward new bidders.

In practice there are really only 3 or 4 operators able to meet the required standards, and Arriva is usually able to offer better value for money services derived from economies of scale such as newer and different types of buses, greener fuel technology and a better customer service infrastructure which smaller companies cannot provide. This is why the other operators tend to cover the rural areas such as Market Drayton and Ludlow, and it is unrealistic to expect them to be able to compete against Arriva for the Shrewsbury Town services.

Shropshire Council involves Arriva in strategic policy planning because they are the main operator in the area and the scale of operation gives Arriva the capacity to take risks that the smaller operators, who rely on subsidies, are unable to take. As noted in section 3.5.2 above, Shropshire Council had found that they receive proportionately fewer complaints about Arriva than about the other smaller operators and that generally Arriva is able to provide a better service because it has a bigger support infrastructure. On one exceptional occasion, there had been an issue when the Council withdrew a contract from an operator who then chose not to deregister the route, but continued to operate the route commercially which precluded another operator being contracted in because the route was still registered with the Traffic Commissioner. As the route was not commercially viable, the service was very poor and left passengers stranded but the Council was not able to contract an alternative operator in. The message is that although increased competition is generally regarded as good for the market, there are potential pitfalls that we need to be mindful of.

3.9 Views of Young People

We visited the Young People's Forum to find out what young people think about the bus service. The Active Involvement Service also

undertook a number of focus group sessions with young people in Charlton, Sutherland and Newport Schools as well as with the Young Carers' Forum and we would like to thank them for their assistance with this consultation.

The young people were asked to say what is good about the buses, what is bad about the buses, and what would convince them to use the buses more. The results of the consultation are shown in the table below. To a large extent they reflect many of the same benefits and issues as the adults we spoke to. There were differences though; the young people were the only group to mention the environmental advantages of buses compared to cars.

The affordability and cost of buses emerged as a big issue, and there were comments from some of the young people that they could not take advantage of bus passes because although they would save money in the long run, the initial outlay was too high. Supporting this view, the Active Involvement Service conducted a survey of 1407 young people in January and February 2009. The survey asked them what they would change in their schools, local area, the borough and nationally. Of the top 5 most popular changes, cheaper public transport featured second, selected by 64% of the young people. Flexi-student passes are available.

Fare setting is done by Arriva, and this is therefore difficult to make a recommendation about. Although this was not agreed as a recommendation for this report, the Council might want to consider exploring the viability of providing some form of discounted ticket, in addition to the flexi-student pass, targeted at young people with particular needs as part of the NEET Strategy.

Results of Consultation with the Young People

Group Surveyed	Good Points	Bad Points	What would convince you...?
CHARLTON SCHOOL	<ul style="list-style-type: none"> • Better for the environment • Cheap fares • Handy, frequent service in general • Good source for employment • Enable young people to have independence and freedom • Smoking prohibited • Good variety of places to visit • Regularity • Some have seat belts 	<ul style="list-style-type: none"> • Poor bus shelters • Behaviour of other passengers • No refreshments available • Payment options • Long slow journeys with too many stops • Bad time keeping • Poor condition of buses. • Not cleaned or inspected regularly enough • Bad attitude from drivers 	<ul style="list-style-type: none"> • Cheaper fares • Cleaner buses • Buses driven more carefully • More facilities/entertainment on bus • A higher frequency of buses • More reliability • CCTV on buses • More concessionary fares • Good facilities on board (TV's)

	<ul style="list-style-type: none"> • Helpful/friendly drivers 		
SUTHERLAND SCHOOL	<ul style="list-style-type: none"> • Better for the environment • Good for social networking • No smoking/drinking alcohol • Cleanliness of seats • High frequency into town centre 	<ul style="list-style-type: none"> • Low frequency at certain times • Not enough bus shelters • General lack of cleanliness/poor condition • No seat belts • Expensive • Bad attitude from the bus drivers 	<ul style="list-style-type: none"> • Nicer bus drivers • Seat belts • Improvements in general condition, cleanliness and entertainment (such as music) • A higher frequency of buses all the time and to more places in Telford • School bus service • Discounted/free fares
NEWPORT GIRLS' HIGH	<ul style="list-style-type: none"> • Amount of bus stops • Frequency on weekdays • Good for social networking • General condition and cleanliness is good • Easily accessible for wheelchairs/pushchairs 	<ul style="list-style-type: none"> • Time keeping and reliability • Expensive • Drivers have bad attitude/unhelpful/smoke and are unable to control bad behaviour • Not enough bus shelters and frequency to rural areas • Infrequent on weekends and evenings • Not enough capacity at peak times • Poor general condition 	<ul style="list-style-type: none"> • Frequency to different areas (Market Drayton, Wolverhampton etc) • Cheaper fares/reintroduction of return fares • Nicer bus drivers • Better facilities (such as bins/luggage holders) • Improved general condition/cleanliness
YOUNG PEOPLE'S FORUM	<ul style="list-style-type: none"> • The bus service in Telford and Wrekin is considered much better than in some places in the UK. • Environmentally more friendly than lots of car on the roads • Bus lanes 	<ul style="list-style-type: none"> • Expensive fares • Drivers attitude and unhelpfulness • Not enough bus stops and frequency to rural areas • Infrequent on weekends and evenings • Journeys take too long with too many stops • Time keeping and reliability • Lack of cleanliness and poor condition of bus shelters 	<ul style="list-style-type: none"> • Free travel for under 16 • More concessionary fares • More frequent, quicker routes, • Better time keeping • Nicer bus drivers • Better information for public • More bus lanes • Music on bus

		<ul style="list-style-type: none"> • Buses incorrectly identified with where they are going • No seatbelts 	
YOUNG CARERS' FORUM	<ul style="list-style-type: none"> • Enables you to travel from one place to another • Some services are regular • Some drivers are friendly if you are a frequent user 	<ul style="list-style-type: none"> • Expensive fares, rising frequently • Concessions not available at certain times • Not enough bus stops and frequency to areas other than the town centre and evening/weekends • Bad timekeeping • Information/ timetables are hard to obtain • Poor condition of buses • Drivers attitude and unhelpfulness • Not enough pram/ disabled spaces • Other passengers are disrespectful • Buses too busy, too small • Poor condition of bus shelters 	<ul style="list-style-type: none"> • Reliable service • More fast track routes • Cheaper bus fares/more concessions • School bus service • Better attitude from drivers • Heaters on buses • Bigger capacity buses • CCTV to aid prevention of ASB

3.10 Increasing bus patronage

It has been noted above that although the investment in bus services turned a 3% decline in passenger numbers to a 20% increase in patronage between 1999 and 2006, growth has slowed with a lack of investment in the buses.

Of the Community Panel survey, only 4% of 617 respondents use the bus on a daily basis, 13% use a bus several times a week, 12 % less than once a week, 17% less than once a month and the majority, 55%, had not used a bus in the last 12 months denoting a falling off of usage. Regarding why people use buses, 80% use the bus for leisure purposes and 17% to get to work. (This was a multiple choice questions, so respondents could tick more than one box.)

As part of the Community Panel survey, we asked non-bus users why they do not use the buses, what would encourage them to use the buses and whether, if all their requirements were met, they would be prepared to try using the bus.

The results showed that, unsurprisingly, of the 203 respondents who had not used the bus for 12 months, the most popular reasons for stopping were that the journey time is too slow (57) and that alternative transport is more convenient (57). The same 2 reasons were top of the list of respondents who had never used the bus service, at 60 and 59 respectively out of 207.

In answer to the question “What would encourage you to use the bus service?” the top 5 answers of 364 respondents were:

- Availability of direct service to required destination 48
- Services available at the required time 38
- Quicker journey times 34
- Cheaper prices 32
- More reliable service 23

In answer to the question “If all your requirements were met by the bus service, would you try using the buses?” 46% of 388 respondents said they would try to use the bus service, 35% said they would continue to use the car or other methods of transport and 19% did not know.

This points to the perennial problem of attracting new users onto the buses. Growing the market by supporting younger passengers, and looking at employment growth areas could be potential markets to consider.

4. CONCLUSIONS AND RECOMMENDATIONS

The review was an unusual one for scrutiny in that it was focussed on a service that is provided almost entirely by an independent, private company outside the Council's authority. Under current legislation, Scrutiny has no powers of scrutiny over private transport operators. Scrutiny can request a meeting with an operator, but there is no obligation on the operator to attend, nor to take any Scrutiny reports or recommendations into account. In undertaking this review, we are therefore mindful of this and would like to thank Arriva for allowing us the opportunity to discuss some of the issues which had been brought to the Scrutiny Members' attention. We would welcome the further opportunity to discuss the findings of the review, and hope that some of the observations and suggestions will be useful.

The Scrutiny review was undertaken because of the number of issues that ward residents had raised with elected Members about the bus services. This in itself implies a lack of public understanding about the powers of the Council over Arriva. We were concerned as the review progressed that some members of the public persist in thinking that the Council is still responsible for bus services when this is not the case. The risk in undertaking the scrutiny review was that it could raise unrealistic expectations about what scrutiny could achieve and we hope that this report will help allay any lingering misapprehensions. Although the Council is committed to working in partnership with Arriva, in practice it has no influence over the company other than on the tendered and subsidised routes.

The recommendations in this report therefore focus on the Council's role in developing the bus network, and how it can work with Arriva to deliver more reliable, more frequent and more affordable services to more residents.

Whereas Arriva provides the actual fleet service, the Council has a responsibility for developing and improving the infrastructure within which the service operates, such as bus only lanes, traffic management, improvements to timetable display information, bus stations, bus shelters and accessible kerbs. These improvements are dependent on resources and are voluntary rather than statutory obligations. We have made the following recommendations to support this aim:

- 1. To introduce a system of cleansing of bus shelters by TWS.**
- 2. To allocate a budget for erecting, maintaining and repairing bus shelters, potentially as a match funding scheme with the Parish Councils. (This is also a recommendation in the Transport Review.)**
- 3. Senior Transport officers to be informed by Highways officers as soon as possible about planned road maintenance and other road works affecting bus services so that advance warning can be given to Arriva and the public and arrangements can be made to minimise disruption and inconvenience.**

- 4. To strengthen the Quality Bus Partnership by developing the relationship at Chief Executive / Head Office level to get better buy-in**
- 5. To incorporate a suitable area for the Bus Station as part of the new Town Centre Development Plan, including a dropping-off and picking-up area.**

The review was predominantly about issues of reliability, punctuality and quality of service on the commercial network which are within the remit of Arriva, although also touched on the Integrated Transport service and subsidised routes funded by the Council, which are also within the scope of the Transport Review. We would like the findings of this review to inform both Arriva's work and to inform the development of strategies arising from the Transport Review. We have therefore made the following recommendations:

- 6. The Bus Services Scrutiny Review Group members to present the findings of the review to Arriva Senior Management. This will feed into Arriva's route review, and provide further feedback to Arriva from customers which may be useful in planning service.**
- 7. The Bus Services Scrutiny Review Group members to be consulted on the development of the Subsidised Bus Policy and the business case for demand responsive rural transport. These are being developed by Northgate Kendric Ash as part of the Transport Review. The evidence gathered during the scrutiny review will be fed into this process.**
- 8. To develop a comprehensive bus access policy in conjunction with the Ironbridge Gorge Museum Trust as part of the World Heritage Access strategy to ensure sustainable transport links the museum sites. The Council needs to improve links into the Gorge but the museum should fund transport around the museum sites.**

We understand that, along with all local authorities, the Council will need to cut spending over the coming years and will have some tough budget decisions to take. But we would urge the Council to consider transport not just as a direct cost but as an enabler to unlocking many social and economic problems in the area. Public transport is integral to meeting the economic and social aspirations for Telford & Wrekin as well as delivering the Council's climate change agenda. We need to take a more strategic approach to transport; it needs to be planned to provide access to the new town centre development, the new Sport and Learning Community facilities and linked to the residential growth points in the borough - and there needs to be a funding commitment to drive change from the top.

Without investment national core indicators are in jeopardy. N177, the national indicator for the number of bus passenger journeys in the local area is below target. Experience has shown that investment in quality bus routes, bus lanes and the roadside infrastructure will increase passenger numbers and help to address this failing indicator. BV104, satisfaction with local bus services as

measured in the Place survey, has also been identified as a high risk performance indicator and will impact on future Comprehensive Area Assessments. We have made the following recommendations to support these aims:

- 9. The Council to review the transport budget in proportion to projected population growth and declining patronage. The wider social, economic and environmental benefits of investment in bus services should be taken into account.**
- 10. Senior Transport officers to be involved at the early planning stage of development projects so that transport is planned and budgeted for in a strategic way.**
- 11. To review the cost implications of removing time restrictions on concessionary travel with a view to offering unlimited free travel throughout the borough to all concessionary pass holders. This should be done when the current extension from 9.30am to 9.00am has been operating for 12 months.**

We were concerned to make sure that in contracting out the tendered routes that the Council continues to strive to make sure that Telford & Wrekin has the best value for money services available. To support this, we have made the following recommendations:

- 12. To explore the opportunity to advertise tenders at the same time as neighbouring authorities to encourage operators to tender for services at the same time. Explore the opportunity to do this with Shropshire Council for the Park & Ride contract due to be renewed in October 2010.**
- 13. The Council to ensure that as many operators as possible are aware of OJEU contracts for bus services.**

5. SUMMARY OF RECOMMENDATIONS

The recommendations are summarised in the table below. We have assigned a priority level to each of the recommendations, and given an indication of the cost.

It is not possible to provide detailed costings for the recommendations within this report without a considerable amount of additional work being undertaken by both scrutiny and finance officers. However, the recommendations have been placed into one of three categories as follows:-

- Low cost indicates that the recommendation could be funded from within existing resources, although not necessarily in the current year.
- Medium cost indicates that the recommendation is anticipated to cost up to £10,000 which is not currently budgeted.
- High cost indicates that the recommendation is expected to cost more than £10,000 which is not currently budgeted.

Recommendation	Indication of cost	Priority level
<p><u>Recommendation 1</u> To introduce a system of cleansing of bus shelters by TWS</p>	LOW/MEDIUM	8
<p><u>Recommendation 2</u> To allocate a budget for erecting, maintaining and repairing bus shelters, potentially as a match funding scheme with the Parish Councils. (This is also a recommendation in the Transport Review.)</p>	HIGH	9
<p><u>Recommendation 3</u> Senior Transport officers to be informed by Highways officers as soon as possible about planned road maintenance and other road works affecting bus services so that advance warning can be given to Arriva and the public and arrangements can be made to minimise disruption and inconvenience.</p>	LOW	5
<p><u>Recommendation 4</u> To strengthen the Quality Bus Partnership by developing the relationship at Chief Executive / Head Office level to get better buy-in</p>	LOW	11
<p><u>Recommendation 5</u> To incorporate a suitable area for the Bus</p>	HIGH	10

Station as part of the new Town Centre Development Plan, including a dropping-off and picking-up area.		
<u>Recommendation 6</u> The Bus Services Scrutiny Review Group members to present the findings of the review to Arriva Senior Management. This will feed into Arriva's route review, and provide further feedback to Arriva from customers which may be useful in planning service.	LOW	6
<u>Recommendation 7</u> The Bus Services Scrutiny Review Group members to be consulted on the development of the Subsidised Bus Policy and the business case for demand responsive rural transport. These are being developed by Northgate Kendric Ash as part of the Transport Review. The evidence gathered during the scrutiny review will be fed into this process.	LOW	7
<u>Recommendation 8</u> To develop a comprehensive bus access policy in conjunction with the Ironbridge Gorge Museum Trust as part of the World Heritage Access strategy to ensure sustainable transport links the museum sites. The Council needs to improve links into the Gorge but the museum should fund transport around the museum sites.	LOW	12
<u>Recommendation 9</u> The Council to review the transport budget in proportion to projected population growth and declining patronage. The wider social, economic and environmental benefits of investment in bus services should be taken into account.	HIGH	1
<u>Recommendation 10</u> Senior Transport officers to be involved at the early planning stage of development projects so that transport is planned and budgeted for in a strategic way.	LOW	2
<u>Recommendation 11</u> To review the cost implications of removing time restrictions on concessionary travel with a	HIGH	13

<p>view to offering unlimited free travel throughout the borough to all concessionary pass holders. This should be done when the current extension from 9.30am to 9.00am has been operating for 12 months.</p>		
<p><u>Recommendation 12</u> To explore the opportunity to advertise tenders at the same time as neighbouring authorities to encourage operators to tender for services at the same time. Explore the opportunity to do this with Shropshire Council for the Park & Ride contract due to be renewed in October 2010.</p>	<p>LOW</p>	<p>3</p>
<p><u>Recommendation 13</u> The Council to procure bus contracts through the OJEU process and ensure as many operators as possible are aware of the opportunities.</p>	<p>LOW</p>	<p>4</p>

ACKNOWLEDGEMENTS

We would like to thank all those listed below who have contributed their time to participate in this review, and have shared information and views with us.

Kevin Walker	Area Manager, Arriva Midlands
Bob Hind	Managing Director, Arriva Midlands North
Martin Hancock	Commercial Manager, National Express West Midlands
Jonathan Pollard	National Express West Midlands
Fred Ratcliff	Head of Passenger Transport, Shropshire Council
James Willocks	Passenger Transport Team Leader, Shropshire Council
Jon Hayes	Public Policy Team Leader, Shropshire Council
Helen Hill	Business Manager Transport, Telford & Wrekin Council
Martyn Wilthall	Transport Team Leader, Telford & Wrekin Council
Stuart Hyde	Mobility Management Team Manager, Telford & Wrekin Council
Stuart Freeman	Business Manager, Network Management and Policy, Telford & Wrekin Council
Brian Cotter	Northgate Kendric Ash
Angie Astley	Head of Business Transformation, Telford & Wrekin Council
Sarah Bass	Business Transformation, Telford & Wrekin Council

Members of the Bus User Group

Members of the Senior Citizens' Transport Action Group

Members of the Disability Forum

Members of the Young People's Forum

Members of the Rural Transport User Group

Telford & Wrekin Town & Parish Councils

We would also like to thank:

Sarah Stembridge and the Active Involvement Team for all their help with organising the consultation with the young people.

Tracy Bennett for organising the Community Panel Survey.

APPENDIX 1 – COMMUNITY PANEL SURVEY

		Base	Gender		Age group			Disability		Ethnicity		Community Cluster				
		All respondents	Male	Female	18-39	40-59	60+	No LTLI	LTLI	White British	BME (incl White Other)	Newport	Wellington	Telford North	Telford Central	Telford South
		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
How often do you use the bus?	Daily	4	3	6	8	3	3	4	5	4	4	0	2	5	5	10
	Several times a week	13	13	12	0	11	14	13	14	13	13	10	10	16	14	10
	Less than once a week	12	13	10	11	8	15	12	12	12	13	11	14	12	9	13
	Less than once a month	17	15	18	14	18	16	17	14	17	14	26	16	16	14	19
	<i>Not in the last 12 months</i>	55	55	54	67	59	51	54	55	55	54	54	57	51	58	48
<i>Base</i>		617	337	278	33	174	316	439	133	521	90	82	167	189	147	31
How far away from home is your nearest bus stop?	Less than a 5 minute walk	68	74	62	83	76	63	71	58	67	75	61	66	73	70	60
	5-10 minute walk	25	20	31	17	17	30	25	30	27	15	32	29	20	25	27
	10-20 minute walk	5	5	4	0	4	5	5	6	4	10	0	4	5	5	13
	More than 20 minute walk	2	1	3	0	3	2	1	6	2	0	8	1	1	0	0
<i>Base</i>		284	149	134	11	71	158	200	66	243	40	38	73	94	64	15

What journeys do you make on the bus?	To work	17	14	19	40	25	11	18	12	18	11	16	20	14	10	40
	To college	3	1	6	0	5	3	3	6	3	3	0	2	6	2	0
	For leisure	90	92	88	100	86	93	89	94	89	94	91	92	91	92	73
<i>Base</i>		223	119	103	9	57	117	158	50	186	36	32	51	77	48	15
What times of the day do you generally travel the most?	Week day - Peak	25	21	30	55	35	17	25	25	26	20	22	28	27	18	31
	Week day - Off peak	77	78	76	73	65	85	74	84	77	78	86	75	77	79	63
	Weekends	32	29	37	45	38	27	35	25	29	55	27	30	35	32	44
<i>Base</i>		278	150	127	10	71	154	198	61	237	40	37	71	92	62	16
Is the journey you most regularly make direct?	Yes	83	79	86	83	88	79	82	82	82	85	78	77	89	81	87
	No	17	21	14	17	12	21	18	18	18	15	22	23	11	19	13
<i>Base</i>		269	146	122	11	69	148	192	60	228	40	37	71	89	57	15
And how regular is this service?	More than one bus every 20 minutes	58	58	59	*	56	58	58	60	58	63	4	62	69	61	92
	More than one bus an hour	23	25	19	*	25	24	23	19	23	20	71	8	21	16	8
	Hourly	10	7	15	*	11	9	9	15	10	11	7	17	6	14	0
	Less frequent	9	10	7	*	8	9	10	6	9	6	18	13	4	8	0
<i>Base</i>		221	117	103	7	61	118	158	48	185	35	28	52	80	49	12
How many buses does your journey involve?	One	79	79	79	*	80	81	80	76	81	68	88	84	80	72	*
	two	20	20	20	*	18	18	19	24	18	29	13	16	20	23	*
	Three or more	1	1	1	*	2	1	2	0	1	4	0	0	0	5	*
<i>Base</i>		171	85	86	6	45	94	128	33	143	28	24	44	54	43	6

To what extent does changing buses extend your journey time?	Less than 10 minutes	30	42	16	*	17	34	35	23	31	*	*	36	35	28	*
	10-20 minutes	52	48	56	*	42	55	55	38	50	*	*	55	53	44	*
	20-30 minutes	9	6	12	*	17	3	8	15	8	*	*	9	6	17	*
	More than 30 minutes	9	3	16	*	25	7	3	23	10	*	*	0	6	11	*
<i>Base</i>		56	31	25	3	12	29	40	13	48	8	6	11	17	18	4
Does the bus timetable coincide with when you want / need to travel?	Yes	80	82	79	62	80	83	81	77	80	83	79	78	83	82	71
	No	20	18	21	38	20	17	19	23	20	18	21	22	17	18	29
<i>Base</i>		270	146	123	11	69	149	192	60	229	40	38	72	89	57	14
How do you rate the punctuality of the buses in general?	Very good	30	30	29	25	26	34	28	34	30	30	59	32	16	27	33
	Good	46	46	46	33	49	44	48	39	44	55	35	38	58	46	40
	Neither good nor poor	17	15	20	25	19	16	16	20	19	10	5	20	18	22	13
	Poor	4	5	4	17	3	3	6	2	5	0	0	4	4	5	13
Very poor	3	4	1	0	3	3	2	5	2	5	0	6	3	0	0	
<i>Base</i>		273	146	126	11	69	152	195	61	232	40	37	71	91	59	15
In an average week, how often, if any, do buses run late?	Never	5	7	3	0	3	8	6	5	5	5	11	9	1	5	0
	Almost never	27	31	22	36	19	29	30	20	27	28	39	25	26	28	20
	Sometimes	39	35	43	36	48	36	37	42	37	46	28	32	45	41	47
	Most of the time	7	5	9	27	4	5	6	10	8	0	0	9	8	7	7
	All of the time	1	1	0	0	1	0	1	2	0	3	0	1	1	0	0
	Don't know	21	21	22	0	25	22	21	22	22	18	22	25	20	19	27
<i>Base</i>		270	144	125	10	69	150	193	60	230	39	36	69	92	58	15
What is the average length	Less than five minutes	26	31	21	36	22	26	28	21	26	24	33	24	26	26	27

of time you have to wait for the delayed bus?	5-10 minutes	49	46	53	27	54	48	48	55	48	55	54	38	54	53	36
	10-20 minutes	19	19	18	9	18	22	17	21	19	17	13	36	11	14	27
	20-30 minutes	5	3	7	27	6	3	5	2	5	3	0	2	7	5	9
	30 minutes to 1 hour	1	1	1	0	0	2	1	0	1	0	0	0	1	2	0
<i>Base</i>		193	100	92	10	50	101	139	42	163	29	24	45	70	43	11
How do you find out bus timetable information & changes to the timetable?	At bus stops	55	61	47	*	52	55	51	62	57	44	74	45	62	40	71
	At the bus station	42	40	44	*	41	44	42	40	41	50	29	44	35	62	36
	Arriva website	17	16	17	*	21	13	20	7	17	14	24	16	15	15	21
	Telford Travelink website	8	8	9	*	8	9	9	5	9	3	9	10	10	5	0
	From a friend / relation	20	16	24	*	22	20	18	22	20	22	15	15	22	25	21
<i>Base</i>		251	134	116	9	63	143	179	55	214	36	34	62	86	55	14
To what extent do you agree or disagree that bus timetable information is easy to find?	Strongly agree	12	11	13	27	14	12	10	14	11	15	21	13	7	10	19
	Agree	47	49	45	27	37	52	49	41	47	51	54	36	52	53	38
	Neither	23	25	22	9	25	23	24	22	25	15	18	24	26	19	38
	Disagree	9	6	13	27	14	7	9	13	9	10	3	17	8	8	6
	Strongly disagree	4	6	2	0	4	5	4	5	5	2	3	7	2	7	0
	Don't know	4	3	5	9	6	2	4	5	3	7	3	4	5	3	0
<i>Base</i>		278	150	127	11	71	154	197	63	236	41	39	72	92	59	16
How do you rate: Temperature on the bus	Very good	10	9	10	9	10	10	10	10	10	10	14	12	5	8	19
	Good	57	61	51	45	56	58	58	52	54	70	68	51	58	59	44
	Neither	25	22	28	27	24	24	25	24	26	15	16	27	28	19	31
	Poor	5	5	6	18	4	5	4	10	6	0	3	3	5	8	6
	Very poor	1	1	2	0	1	1	2	2	2	0	0	3	1	2	0
	Don't know	3	1	4	0	4	1	3	3	2	5	0	4	2	3	0

<i>Base</i>		277	149	127	11	70	153	198	62	236	40	37	73	92	59	16
How do you rate: Comfort of the seats	Very good	5	5	6	0	6	6	5	6	6	0	3	7	4	4	19
	Good	49	52	46	45	45	51	52	37	47	63	62	48	45	49	50
	Neither	27	27	28	27	30	26	27	33	28	24	24	29	32	22	25
	Poor	15	16	15	27	16	16	15	17	16	11	8	14	16	24	6
	Very poor	2	1	3	0	3	1	1	5	2	3	3	1	2	2	0
	Don't know	1	0	2	0	0	1	1	2	1	0	0	1	1	0	0
<i>Base</i>		273	147	125	11	67	151	193	63	234	38	37	73	92	55	16
How do you rate: The overall comfort of the buses	Very good	7	8	6	9	9	6	6	6	8	0	8	7	3	5	25
	Good	45	47	44	36	41	47	48	34	43	63	55	49	43	38	44
	Neither	32	31	32	27	34	30	31	37	32	24	26	30	34	36	19
	Poor	13	13	13	27	13	15	11	16	14	8	8	13	16	15	6
	Very poor	2	1	3	0	3	1	2	5	2	3	3	0	2	5	0
	Don't know	1	1	2	0	0	1	1	2	1	3	0	1	1	0	6
<i>Base</i>		273	146	126	11	68	151	192	62	234	38	38	71	93	55	16
How do you rate: Disposal of litter from the bus	Very good	4	5	2	0	9	3	4	3	5	0	3	5	3	4	6
	Good	37	41	31	27	30	41	40	23	34	53	50	34	34	36	31
	Neither	29	26	33	36	30	28	28	33	30	22	37	25	27	27	50
	Poor	20	19	21	18	18	20	18	26	21	14	11	22	24	20	6
	Very poor	8	7	10	18	9	5	8	10	8	8	0	8	10	11	6
	Don't know	2	2	2	0	3	2	2	5	2	3	0	5	1	2	0
<i>Base</i>		272	147	124	11	66	152	193	61	235	36	38	73	90	55	16
How do you rate: Cleanliness of seats	Very good	4	6	2	0	7	5	4	3	5	0	3	5	4	4	6
	Good	40	44	34	36	40	39	40	36	37	57	47	47	33	36	38
	Neither	34	33	35	36	31	35	34	38	36	22	37	25	41	33	38
	Poor	15	11	19	18	13	15	15	15	15	14	11	15	13	20	13
	Very poor	7	6	7	9	9	6	7	7	6	8	3	7	8	7	6
	Don't know	1	0	2	0	0	1	1	2	1	0	0	1	1	0	0
<i>Base</i>		273	147	125	11	68	152	193	61	235	37	38	73	91	55	16

How do you rate: The overall cleanliness of the buses	Very good	6	8	5	0	12	6	6	7	7	3	8	7	5	7	6
	Good	40	41	38	36	39	41	41	30	35	68	55	40	34	40	31
	Neither	31	31	30	36	26	30	32	32	34	8	24	23	40	27	44
	Poor	16	13	20	9	18	17	14	23	17	14	11	22	14	20	6
	Very poor	6	7	6	18	5	5	6	7	6	8	3	7	7	5	13
	Don't know	1	0	2	0	0	1	1	2	1	0	0	1	1	0	0
Base		270	145	124	11	66	151	192	60	232	37	38	73	88	55	16
How do you rate: Your personal safety whilst waiting for the bus	Very good	5	5	5	9	7	4	5	5	4	8	5	3	5	5	6
	Good	48	50	44	18	52	50	48	48	45	62	65	49	42	49	31
	Neither	35	34	37	64	28	34	35	34	38	16	27	33	44	33	25
	Poor	6	6	6	0	4	7	6	5	6	5	3	3	5	7	31
	Very poor	4	3	4	9	4	3	3	7	4	3	0	8	1	4	6
	Don't know	2	1	3	0	3	2	3	2	2	5	0	4	2	2	0
Base		272	147	124	11	67	151	193	61	234	37	37	73	91	55	16
How do you rate: Your personal safety whilst on the bus	Very good	8	9	6	9	11	7	8	5	8	8	8	5	10	5	13
	Good	53	54	53	27	54	58	53	53	50	73	78	55	46	53	31
	Neither	28	26	31	64	27	22	29	31	31	13	14	27	34	28	31
	Poor	5	7	3	0	3	7	5	3	6	0	0	1	6	7	19
	Very poor	3	3	3	0	1	3	2	6	3	0	0	7	2	2	0
	Don't know	3	3	3	0	3	3	4	2	2	8	0	4	1	5	6
Base		277	149	127	11	70	153	197	62	236	40	37	73	93	58	16
To what extent do you agree or disagree: Bus drivers are generally considerate to other road users	Strongly agree	16	19	13	9	17	17	17	13	15	20	29	14	13	14	19
	Agree	60	58	63	55	57	60	59	60	59	65	63	55	62	67	44
	Neither	14	13	16	9	16	14	13	17	16	5	5	16	19	9	19
	Disagree	6	7	5	9	4	6	6	6	5	8	0	11	4	4	13
	Strongly disagree	2	3	1	18	1	2	3	2	3	0	3	1	0	5	6
	Don't know	2	1	3	0	4	1	2	2	2	3	0	3	2	2	0
Base		278	149	128	11	70	154	196	63	237	40	38	73	94	57	16

To what extent do you agree or disagree: Bus drivers are generally considerate of passenger safety and comfort	Strongly agree	18	23	13	27	13	21	19	13	19	13	35	16	12	17	25
	Agree	50	48	52	36	54	53	50	48	47	65	49	45	54	55	31
	Neither	19	16	23	27	17	14	21	16	20	13	14	21	20	16	31
	Disagree	10	11	9	9	11	10	8	17	11	8	0	14	11	10	13
	Strongly disagree	1	1	2	0	1	1	1	5	2	0	3	3	1	0	0
	Don't know	1	1	2	0	3	1	2	2	1	3	0	1	2	2	0
<i>Base</i>		278	149	128	11	70	154	197	63	237	40	37	73	94	58	16
To what extent do you agree or disagree: Bus drivers are generally friendly and helpful	Strongly agree	21	28	13	27	16	25	22	15	21	21	34	21	14	22	20
	Agree	47	45	49	18	49	48	46	47	45	56	50	42	53	47	27
	Neither	19	14	26	18	26	15	19	23	21	13	16	23	18	17	27
	Disagree	9	11	8	18	7	10	9	11	10	5	0	12	10	10	13
	Strongly disagree	3	3	2	18	0	1	3	3	3	3	0	1	3	2	13
	Don't know	1	1	2	0	1	1	2	2	1	3	0	1	2	2	0
<i>Base</i>		277	149	127	11	69	155	196	62	237	39	38	73	93	58	15
Do you ever travel with children in a buggy?	Yes, most journeys	3	1	5	8	1	1	4	0	3	2	0	3	1	7	6
	Yes, some journeys	7	3	12	17	13	3	7	6	7	7	3	5	11	7	6
	No	90	95	84	75	86	96	90	94	90	90	97	92	88	87	88
<i>Base</i>		280	151	128	11	71	155	200	62	238	41	37	73	93	61	16
How easy is it to get on the bus with the buggy?	Very easy	3	*	5	*	0	*	5	*	4	*	*	*	0	*	*
	Fairly easy	55	*	59	*	60	*	57	*	56	*	*	*	50	*	*
	Neither	24	*	23	*	30	*	29	*	20	*	*	*	33	*	*
	Fairly difficult	10	*	5	*	10	*	5	*	12	*	*	*	8	*	*
	Very difficult	7	*	9	*	0	*	5	*	8	*	*	*	8	*	*

<i>Base</i>		29	7	22	2	10	7	21	5	25	4	1	6	12	8	2
Have you ever not been able to get on the bus because of lack of space for the buggy?	Yes, often	23	*	27	*	9	*	23	*	24	*	*	*	0	*	*
	Yes, occasionally	57	*	59	*	82	*	55	*	56	*	*	*	73	*	*
	No	20	*	14	*	9	*	23	*	20	*	*	*	27	*	*
<i>Base</i>		30	8	22	2	11	7	22	4	25	5	2	6	11	9	2
Which of the following statements most applies for the bus journey you most regularly make?	The buses are overcrowded	10	10	10	17	10	9	9	11	10	10	3	11	11	9	13
	The buses are well used	74	73	75	67	72	75	76	70	73	79	86	67	76	77	60
	The buses are under used	15	15	15	17	18	14	14	16	16	10	11	19	12	14	20
	The buses are empty	1	1	1	0	0	2	1	4	1	0	0	3	0	0	7
<i>Base</i>		268	143	124	11	68	149	194	56	228	39	36	72	89	56	15
Do you ever use a saver bus ticket?	Yes, often	10	8	12	33	14	5	9	13	11	5	14	13	4	10	19
	Yes, sometimes	10	10	11	9	13	7	9	16	11	5	5	13	14	6	6
	No	80	82	77	55	73	88	82	71	78	90	81	74	82	84	75
<i>Base</i>		279	150	128	11	71	153	198	63	236	42	37	70	93	63	16
If yes, what types?	Telford Day Saver	81	84	79	*	68	94	94	59	80	*	*	84	76	*	*
	Telford Weekly Saver	17	12	21	*	21	13	12	29	18	*	*	11	12	*	*
	Telford 4 Weekly Saver	7	0	14	*	5	0	6	12	8	*	*	0	6	*	*
	Telford 10 Trip Saver	11	4	17	*	16	6	6	24	12	*	*	11	6	*	*

	Midlands Day Saver	22	20	24	*	32	6	21	24	20	*	*	16	35	*	*
	Midlands Weekly Saver	0	0	0	*	0	0	0	0	0	*	*	0	0	*	*
	Midlands 4 Weekly Saver	0	0	0	*	0	0	0	0	0	*	*	0	0	*	*
	Midlands 10 Trip Saver	0	0	0	*	0	0	0	0	0	*	*	0	0	*	*
<i>Base</i>		54	25	29	5	19	16	34	17	50	4	5	19	17	9	4
What mostly determines the type of saver ticket you buy?	Cost of travelling	65	75	56	*	65	63	71	47	66	*	*	68	80	*	*
	Your travel pattern	33	21	44	*	35	38	29	47	32	*	*	32	13	*	*
	Ease of buying the pass	2	4	0	*	0	0	0	7	2	*	*	0	7	*	*
<i>Base</i>		49	24	25	4	17	16	31	15	47	2	4	19	15	7	4
Do you have a disability which makes bus travel difficult, or care responsibilities for someone with a disability or mobility issue?	Yes	19	17	22	0	23	20	14	35	19	20	11	21	21	23	0
	No	81	83	78	100	77	80	86	65	81	80	89	79	79	77	##
<i>Base</i>		272	144	127	11	69	149	192	63	231	40	35	71	89	61	16
What improvements, if any, could be made to make	Low steps	37	28	49	38	38	36	34	46	36	44	26	23	39	56	38
	A bus stop nearer to where you live	10	11	10	13	10	10	8	19	9	15	13	9	8	10	23

bus travel easier?	More help from the driver to get on/off the bus	18	15	21	13	20	16	14	31	18	18	6	29	14	21	15
	Seats near the door dedicated for use by people with a disability	32	29	36	50	37	29	28	48	31	38	23	25	34	48	15
	None	42	49	33	25	47	41	47	25	43	35	58	48	39	31	31
<i>Base</i>		227	123	103	7	60	125	160	52	192	34	31	56	79	48	13
To what extent do you agree or disagree that bus services within Telford & Wrekin meet your travel requirements?	Strongly agree	10	12	8	0	10	11	11	8	10	7	8	10	10	11	13
	Agree	50	51	48	42	49	50	49	53	48	61	54	46	52	53	27
	Neither	20	15	25	50	20	17	20	13	20	17	16	15	26	17	20
	Disagree	13	16	11	8	17	13	15	13	14	10	14	22	6	11	27
	Strongly disagree	5	5	5	0	4	5	4	9	5	2	8	6	3	6	0
	Don't know	2	2	3	0	0	3	2	5	3	2	0	1	3	2	13
<i>Base</i>		282	152	129	11	71	157	199	64	240	41	37	72	94	64	15
To what extent do you agree or disagree that local bus fares offer value for money for the service delivered?	Strongly agree	5	6	4	0	4	6	5	5	5	8	6	3	6	5	14
	Agree	24	27	19	27	28	22	24	18	22	31	37	22	19	23	36
	Neither	29	30	28	27	22	31	31	26	31	18	31	20	37	26	21
	Disagree	16	11	23	27	26	10	16	18	17	15	11	14	21	13	21
	Strongly disagree	8	8	8	18	7	8	7	13	9	3	0	16	4	11	0
	Don't know	18	18	18	0	13	23	17	20	16	26	14	25	12	21	7
<i>Base</i>		268	148	119	11	69	145	190	61	228	39	35	69	89	61	14

Non bus users - have you ever used the bus service for local travel?	Yes	53	53	55	80	61	43	55	46	53	56	47	49	55	58	60
	No	47	48	45	20	39	57	45	54	47	44	53	51	45	42	40
<i>Base - Non users</i>		367	200	166	23	106	178	262	80	312	50	47	106	103	95	15
Why did you stop using the bus service?	Journey time too slow	57	56	57	53	68	49	59	49	54	68	68	46	57	61	50
	Too expensive	28	25	31	32	29	25	26	28	27	29	24	20	25	35	40
	Required route not available	28	25	31	47	31	26	30	21	25	43	40	26	24	30	20
	Lack of direct services	31	34	27	53	31	31	31	23	26	57	36	34	24	35	20
	Proximity of bus stop	8	7	9	11	9	5	7	12	6	14	8	6	10	7	10
	Alternative transport more convenient	57	56	59	68	54	60	60	49	55	68	68	56	59	57	30
	Concerns about personal safety	18	19	17	37	18	14	15	21	20	11	20	16	19	17	30
	Service not available at the required time	30	35	24	32	35	30	33	26	27	46	44	30	22	33	30
	Lack of comfort of travel	18	17	18	21	20	15	17	21	18	18	16	16	17	20	10
	Not accessible with a disability	11	12	11	0	9	16	8	26	13	4	0	14	13	13	10
Unpleasant	11	9	14	11	9	7	12	12	12	7	4	10	16	11	10	

	experience															
Base - Non users		203	109	94	17	65	81	142	43	172	28	25	50	63	54	10
Why do you currently not use buses?	Journey time too slow	60	61	59	57	68	54	64	46	59	69	65	56	62	58	60
	Too expensive	28	25	31	33	29	26	28	24	26	34	19	23	21	39	40
	Required route not available	33	34	33	57	35	32	37	20	30	52	46	37	26	37	10
	Lack of direct services	29	32	27	43	35	26	29	22	27	45	46	29	26	28	20
	Proximity of bus stop	8	8	9	14	6	5	7	12	8	10	8	6	13	5	10
	Alternative transport more convenient	59	62	55	67	50	62	61	56	59	55	58	63	67	54	20
	Concerns about personal safety	18	17	19	29	18	15	15	22	18	17	15	13	15	19	50
	Service not available at the required time	29	30	28	29	35	26	31	29	28	34	38	27	25	32	30
	Lack of comfort of travel	15	16	15	14	19	15	15	15	15	17	15	13	11	21	10
	Not accessible with a disability	9	9	9	0	4	15	6	22	10	3	0	12	10	9	10
	Unpleasant experience	5	4	6	0	7	4	5	5	5	3	4	4	7	4	10
Base - Non users		207	113	94	18	68	82	150	41	176	29	26	52	61	57	10
What would encourage you	Cheaper prices	32	29	34	50	33	26	33	26	31	35	31	28	29	38	35

to use the bus service?	More reliable service	23	18	28	54	22	17	20	30	21	33	17	19	25	28	24
	Availability of direct service to required destination	48	47	50	63	53	51	48	46	47	59	63	53	41	46	41
	Proximity of bus stop	16	18	14	25	19	16	14	23	16	18	23	18	13	15	24
	Quicker journey times	34	30	39	50	34	29	34	35	32	47	33	36	34	32	35
	Cleaner buses	18	18	17	29	13	18	18	16	19	10	4	22	20	17	18
	Less crowded buses	16	13	20	42	15	10	16	14	16	20	6	16	21	18	6
	More comfortable buses	16	14	17	21	21	13	16	17	16	18	10	15	14	22	18
	Services available at the required time	38	35	41	63	37	36	37	40	35	53	42	42	35	39	18
	More accessible for people with a disability	15	13	17	8	13	17	12	27	16	8	10	22	15	14	0
	None of the above	20	25	14	8	21	21	20	21	21	14	13	20	24	17	29
<i>Base - Non users</i>	364	197	166	24	106	174	257	81	310	51	48	102	103	93	17	
If all your requirements were met by the bus service, would you...?	Try to use the bus service	46	44	48	48	52	44	45	51	44	62	60	40	40	49	56
	Continue to use car or other methods of transport	35	37	33	26	31	34	37	33	36	23	31	37	41	29	31

	Don't know	19
<i>Base - Non users</i>		<i>388</i>

20	19		22	17	22
<i>210</i>	<i>177</i>		<i>25</i>	<i>113</i>	<i>192</i>

19	16
<i>271</i>	<i>88</i>

20	15
<i>330</i>	<i>53</i>

9	23	19	22	13
<i>55</i>	<i>113</i>	<i>105</i>	<i>98</i>	<i>16</i>

TELFORD & WREKIN COUNCIL

CABINET - 23rd MARCH 2010

RESPONSE TO SCRUTINY REPORT ON BUS SERVICES

REPORT OF CABINET MEMBER FOR ENVIRONMENT AND RURAL AREA

1.0 PURPOSE

- 1.1 To inform Cabinet Members of the proposed response to the Scrutiny report.

2.0 RECOMMENDATION

- 2.1 **That the recommendations made by the Scrutiny Commission are noted and the response set out in Appendix 1 is approved.**

3.0 SUMMARY

- 3.1 This report summarises the response to the recommendations made by the Scrutiny review into bus services, which are operated in the borough by Arriva Midlands. The review undertook an in depth consultation with users and non-users including groups such as the Bus User Group, Senior Citizen Transport Action Group, Disability Forum as well as speaking with Arriva management, other operators for example in the West Midlands and officers from Shropshire Council and staff in the Council's Transport Service Delivery Unit.

4.0 PREVIOUS MINUTES

None.

5.0 INFORMATION

- 5.1 Members were aware of concerns raised by ward residents about bus services in the borough. The review had four main objectives;
- To address immediate and future issues of reliability and quality of provision and to improve the bus services in Telford & Wrekin
 - To review the Quality Bus Partnership between the Council and Arriva
 - To identify the needs of Telford & Wrekin with regard to bus services and assess whether the current provision meets these needs

- To change perceptions of the bus services and increase bus patronage
- 5.2 A major concern for regular and infrequent passengers alike is the punctuality and reliability of services. The reason for poor punctuality may lie either with the bus operator, the local traffic authority (the Council), or a combination of the two, however performance against national indicators has improved in the last two years from 76% to 80.5% of buses on non frequent services running on time. By improving dialogue and procedures better information relating to road works could be shared between officers and information supplied to the bus operator would improve punctuality and reliability.
 - 5.3 Within the borough there are a number of commercial routes which are operated and funded solely by the bus operator and subsidised routes which the council chooses to fund in order to provide access to services for people who either do not have access to a car or who choose to travel by sustainable transport. The recommendations in this report will help formulate the forthcoming route review which is being undertaken by Arriva in order to refresh the network, address concerns raised by users and Members and through the introduction of a bus subsidy policy, provide an efficient bus network. Future procurement will be widely advertised through the OJEU process and be timed to try and encourage other operators to the area; but it is acknowledged that Telford is not big enough to support more than one operator.
 - 5.4 The report coincided with a review of transport being undertaken by Northgate Kendrick Ash, which focuses on best value improvements and cost efficiencies to be derived from Council owned assets and Council funded services across all wheeled transport. However, some recommendations are interlinked and the development of a bus subsidy policy and a new proposed demand responsive transport system will ensure transport provision is improved in the borough within available budgets. Consideration of a transport interchange in Telford town centre is identified as a priority and this will be considered as part of the Telford Central Development Action Plan.
 - 5.5 A barrier for some people to use public transport is the bus stop infrastructure as if this is in a poor state of repair it will affect resident's perceptions of the public realm. The report recommends funding be allocated to the cleansing, provision and maintenance of bus shelters.
 - 5.6 Bus services were de-regulated and taken out of local authority control and into private ownership in 1985. Bus operators are now registered and licensed to operate individual routes and regulated by the Traffic Commissioners, completely outside local authority control. Telford & Wrekin Council and Arriva Midlands have a Quality Bus Partnership which is a voluntary agreement to work together and a commitment to provide reliable, affordable, high-quality services. The Council undertakes through its Local Transport Plan to provide infrastructure

improvements such as bus lanes, traffic management, bus shelters and accessible kerbs, whilst Arriva provides vehicles maintained and operated to a high standard, fast frequent services and trained staff. The importance of senior management support from both organisations is essential to ensure a strong commitment from both parties and a willingness to invest in order not only to improve services for residents, but address the future growth of the borough e.g. rural, neighbourhood priority areas, key services and borough towns.

- 5.7 The partnership initially had great success resulting in a reversal of a 3% p.a. decline in bus patronage during the 1990s, to a 20% growth from 1999-2006. However, in recent years bus patronage has declined nationally and locally and reflects a lack of investment in routes. BV104 (customer satisfaction) in 2007-08 showed that 59% were satisfied with local bus services overall, and 18% were dissatisfied. This figure is within 0.3% of the average of Telford & Wrekin's family group of comparable authorities, ranking 4th in the group of 14 authorities.
- 5.8 Transport access to the Ironbridge Gorge World Heritage site will be included in the development of the Council's next Local Transport Plan (LTP3). An integrated rail/bus/museum entry ticket is intended to be launched for the 2010 tourism season.
- 5.9 In April 2009 the concessionary fare scheme for eligible people was extended and made available from 9.00a.m. This extension has provided additional access to services for card holders and has cost an additional £110,000. As from April 2010, the Department for Transport will be requiring authorities to provide a breakdown of costs of the scheme identifying expenditure for the core scheme and any enhancements the Council chooses to offer. It is envisaged this will be used to ensure appropriate grant payments are paid. It is recommended that no further extensions to the scheme are considered at this time.

6.0 BACKGROUND

6.1 Equality & Diversity

Concern was raised by users regarding the provision of low floor easy access buses on all routes. In January 2010, Arriva introduced a new fleet of fourteen buses on the 44 route, which has enabled some of the buses previously used to be cascaded onto other routes. The government has set a target of all buses to be fully accessible by 2017, but Arriva is confident the network will soon be 100% easy access.

6.2 Environmental Impact

As the Arriva fleet is renewed better, more efficient carbon friendly vehicles are introduced reducing the carbon footprint. When routes are re-tendered prices are received for low emission, low floor access buses and a decision on affordability has to be made.

6.3 Legal Comment

There are no direct legal implications arising from this report, however, legal advice will be provided when required in respect of procurement and contractual issues that may arise.

6.4 Links with Corporate Priorities

Bus services support sub-priority 4 “Improving Access, Mobility and Public Transport” of the Council’s Priority Plan for “Maintaining a High Quality, Attractive and Sustainable Environment”-

- Design and manage a transport network which supports sustainable economic growth and promotes sustainable travel
- Reduce social exclusion and optimise accessibility to local facilities including healthcare, education and employment in Telford Town Centre, Borough Towns and the rural area
- Increase public satisfaction levels with public transport

6.5 Opportunities & Risks

- 6.5.1 Members are reminded of the efficiencies and financial savings identified in the Transport Review undertaken by Northgate Kendrick Ash with the need to deliver the Service Improvement Programme. Failure to invest in bus services could leave areas within the borough where there is low car ownership devoid of access to key services. Extension of the concessionary fare scheme to 24 hours a day could mean the Council will have to fund the purchase of buses on certain routes due to over loading as under the scheme the bus operator can be no better or no worse off.

6.6 Financial implications

- 6.6.1. The budget strategy for 2010/11 includes £600,000 savings to be delivered from efficiencies identified through a review of the Transport service being led by Northgate Kendrick Ash. This review will consider a number of areas which are included within the Scrutiny review, and the recommendations of the two reviews need to be viewed concurrently in order to avoid duplication or conflict.
- 6.6.2. The response to the Scrutiny review as detailed in Appendix 1 agrees to review a number of areas which, if adopted, may increase spending

within the Transport Service – in particular the allocation of a budget for the repair and maintenance of bus shelters, and the consideration of an extension to the current concessionary travel scheme

6.6.3. The budget for concessionary travel in 2009/10 is £1,780,300 – which is net of Concessionary Travel Grant income of £539,000. In addition, the extensions to the concessionary scheme in 2009/10 to allow travel between 9.0 am and 9.30am will increase the concessionary travel spend by £110,000. As the Concessionary Travel Grant can only be used to fund travel within the core hours, all of these additional costs will fall against the base budget. Any enhancements to the concessionary travel scheme to further extend the hours of operation will increase expenditure and would not be eligible for Concessionary Travel Grant funding. There is no capacity to absorb any additional costs within the existing transport budgets.

6.6.4. In view of the budgetary position of the Council, and the requirement for the Transport service to deliver ongoing savings, it is recommended that any increased costs in service are at least offset by identifying corresponding savings within the service area.
JAC 040310

6.7 Ward implications

The report relates to all wards in the borough.

7. BACKGROUND PAPERS

Scrutiny Review of Bus Services January 2010

Appendix 1 Cabinet Response to Scrutiny Review of Bus Services.

Report prepared by Helen Hill, Transport Business Manager x 84606

Bus Services Scrutiny Review

	Scrutiny Review Group Recommendations	Benefits of recommendation	Summary of Action Being Taken	Timescale	Officer responsible
1	To introduce a system of cleansing of bus shelters by TWS	To make bus stops decent for bus users, to make buses a more attractive transport option and to improve the overall quality and attractiveness of the environment.	Agreed. Officers will look to accommodate this in the emerging contract Technical Specification review.	Spring 2010	Mark Greaves
2	To allocate a budget for erecting, maintaining and repairing bus shelters, potentially as a match funding scheme with the Parish Councils. (This is also a recommendation in the Transport Review.)	To make bus stops high quality and accessible for bus users, to make the buses a more attractive option and to improve the overall quality and attractiveness of the environment.	Partially Agreed. Funding can be allocated from the Local Transport Plan (LTP) Capital Programme for 2010-2011 to improve bus shelters but capital funding cannot be used for general maintenance. The funding allocation for future years is yet to be determined and a decision will need to be taken for future years funding once LTP allocations are known. Match funding from Parish Councils is sought whenever possible. The Council receives three additional shelters each year through its contract with Adspace, who manage and provide shelters on highly trafficked routes,	2010-2011	Stuart Freeman
3	Senior Transport officers to be informed by Highways officers as soon as possible about planned road maintenance and other road works affecting bus services so that advance warning can be given to Arriva and the public and arrangements can be made to minimise disruption and inconvenience.	To minimise disruption to bus services resulting from road works.	Agreed. Improved communication between service delivery units is a key strand of the One Council approach. Improvement in communication between officers and Arriva is being implemented.	Spring 2010?	Keith Smith Stuart Freeman Helen Hill
4	To strengthen the Quality Bus Partnership by developing the	To make the Quality Bus Partnership as robust	Agreed. Senior management / Cabinet Member to meet with Arriva		Jonathan Rowe

Bus Services Scrutiny Review

	relationship at Chief Executive / Head Office level to get better buy-in	and effective as possible.	Managing Director annually. Two meetings have already occurred this year.		
5	To incorporate a suitable area for the Bus Station as part of the new Town Centre Development Plan, including a dropping-off and picking-up area.	To improve the accessibility of the bus services to all bus users, and in particular for elderly people and people with disabilities or mobility issues.	Pending. The location of the bus station has been considered as part of the Central Telford Area Action Plan (CTAAP). Detailed designs are not being developed at this stage, but any future scheme will seek to improve drop-off/ pick-up arrangements	September 2010	Michael Barker Stuart Freeman
6	The Bus Services Scrutiny Review Group members to present the findings of the review to Arriva Senior Management. This will feed into Arriva's route review, and provide further feedback to Arriva from customers which may be useful in planning service.	<ul style="list-style-type: none"> • To try to ensure the findings of the review are presented to Arriva for discussion so they can have maximum impact. • To help build a positive relationship with Arriva. 	Completed The lead of the scrutiny review into bus services met with Arriva to present findings and understand implications of route review.	February 2010	Helen Hill
7	The Bus Services Scrutiny Review Group members to be consulted on the development of the Subsidised Bus Policy and the business case for demand responsive rural transport. These are being developed by Northgate Kendric Ash as part of the Transport Review. The evidence gathered during the scrutiny review will be fed into this process.	To ensure the findings of the review are taken into account in the development of strategies.	Agreed Scrutiny Members were invited to a workshop to engage with the formulation of the policy. Further consultation with Members will be undertaken as routes in the borough are reviewed and the policy is implemented.	February 2010	Helen Hill
8	To develop a comprehensive bus access policy in conjunction with the Ironbridge Gorge Museum Trust as part of the World Heritage Access strategy to ensure sustainable transport links the	To improve access to tourist sites in the Gorge to increase levels of tourism.	Agreed. Policy regarding transport access to the WHS will be considered as part of the development of LTP3 by March 2011. An integrated rail/bus/ museum entry ticket is intended to be		Keith Harris Stuart Freeman

Bus Services Scrutiny Review

	<p>museum sites. The Council needs to improve links into the Gorge but the museum should fund transport around the museum sites.</p>		<p>launched for the 2010 tourism season. Discussions regarding cost recovery for Gorge transport services with the Museums' Trust will be held as part of planning future funding for Gorge Connect for 2011 and beyond. Currently external funding has been secured for this year to support the Gorge Connect bus service Saturdays, Sundays, Bank Holiday Mondays April - October</p>		
9	<p>The Council to review the transport budget in proportion to projected population growth and declining patronage. The wider social, economic and environmental benefits of investment in bus services should be taken into account.</p>	<ul style="list-style-type: none"> • To facilitate the development of high quality bus services which meet the strategic growth ambitions of the borough and the needs of local people. • To help meet the Council's Climate for Change agenda. • To help meet the Council's Equalities and Diversity Policy. 	<p>Not Agreed. The Transport Review has identified savings in the bus subsidy budget. Section 106 agreements will be sought from developers to help support services to new developments. Tenders for subsidised bus services will seek costs for using low emission/ eco friendly vehicles with low floor easy access, but this may increase the costs and may not be affordable in line with best value and value for money principles. The CTAAP recognises the importance of sustainable transport and bus priority measures will be part of the development of the town centre. Efficiencies can be identified from current spending through the development of a bus subsidy policy and resource allocation could ensure key services are made accessible to residents</p>		
10	<p>Senior Transport officers to be involved at the early planning stage of development projects so that transport is planned and budgeted for in a strategic way.</p>	<ul style="list-style-type: none"> • To improve the efficient planning and budgeting of transport funding. • To ensure local people are able to access new 	<p>Agreed Officers will liaise with residential and business developments to plan future public transport arrangements.</p>	<p>Ongoing/ Subject to implementation of Transport Review</p>	<p>Stuart Freeman</p>

Bus Services Scrutiny Review

		developments and facilities.			
11	To review the cost implications of removing time restrictions on concessionary travel with a view to offering unlimited free travel throughout the borough to all concessionary pass holders. This should be done when the current extension from 9.30am to 9.00am has been operating for 12 months.	<ul style="list-style-type: none"> • To evaluate and ensure the affordability of the current extension or any further extension to the current concessionary travel scheme. • If the scheme is extended it will improve the affordability of travel for pass holders and bring the scheme in line with neighbours in Shropshire. 	Not Agreed The Council will review the current arrangement where funding is provided for the scheme starting at 9.00 a.m. with the aim of continuing with this, however any extension to these hours will not be considered.	May 2010	Helen Hill
12	To explore the opportunity to advertise tenders at the same time as neighbouring authorities to encourage operators to tender for services at the same time. Explore the opportunity to do this with Shropshire Council for the Park & Ride contract due to be renewed in October 2010.	<ul style="list-style-type: none"> • To increase the likelihood of more competitive tenders. • To bring additional value for money from joint contracting. 	Agreed. Current subsidised bus route tenders expire October 2010 and these will be re-tendered in conjunction with the bus subsidy policy and the route review being undertaken by Arriva. It would not be a joint contract but co-ordinating the tendering process will ensure operators are aware of the potential for expansion into this area.	October 2010	Helen Hill
13	The Council to procure bus contracts through the OJEU process and ensure as many operators as possible are aware of the opportunities.		Agreed. Due to the value of the contracts the Council is obliged to procure through the OJEU process.	October 2010	Helen Hill

TELFORD & WREKIN COUNCIL

CABINET - 23RD MARCH 2010

TRANSPORT CHANGE PROGRAMME: BUS SUBSIDY POLICY

REPORT OF HEAD OF ENVIRONMENTAL SERVICES

1. PURPOSE

- 1.1 To gain approval for the adoption of a bus subsidy policy which will provide a structured methodology for the way the Council decides which bus routes to subsidise now and in the future.

2. RECOMMENDATIONS

- 2.1 That Members agree and adopt the proposed bus subsidy policy**

3. SUMMARY

- 3.1 The Transport Change Programme was agreed by Cabinet in July 2009 with a number of caveats, one being that the proposals to introduce a bus subsidy policy be subject to more consultation and a business case be brought back to Members. A full business case with supporting appendices is now submitted for consideration.

4. PREVIOUS MINUTES

- 4.1 Cabinet minutes 21.07.09 CB-52 Closed Session

5. INFORMATION

- 5.1 Appendices to this report set out the business case in support of the proposed policy and include an Equalities Impact Assessment.

6. BACKGROUND AND KEY PROPOSALS

- 6.1 The Council has a responsibility to increase accessibility to services such as healthcare, education, employment for as many people as possible; thereby reducing social exclusion and improving access to the borough towns
- 6.2 As part of the Transport Act 1985, bus services were deregulated in October 1986 and are now controlled and managed by the Traffic Commissioner.. Local Authorities are able to contract for bus services where the deregulated market does not provide them (known as subsidised bus services).

- 6.3 The Council currently (2008/09) spends in the region of £706,580 annually at a gross level on subsidised bus services, £575,930 at a net level (after grant funding).
- 6.4 In Telford and Wrekin, 96% of the bus routes are commercially operated (by Arriva Midlands) and 4% are provided and subsidised by the Council.
- 6.5 The Council has to ensure that the limited funds available are spent in the most effective manner with regard to value for money and best value principles.
- 6.6 Currently, the Council does not have a policy which covers this spend. Expenditure needs to be linked to Council priorities and support value for money objectives. The bus subsidy policy is not intended to commit the Council to the additional provision or deletion of services; it is simply designed as a tool for aiding decision making.

The policy will support officers and Members by:

- 6.6.1 Establishing weighting and scoring criteria against which new and existing contracts can be tested both in terms of value for money and socio-economic factors
- 6.6.2 Creating a framework which would allow decision making around the continued provision of services in terms of changing requirements both from a demand and supply point of view
- 6.6.3 Establishing rules and process whereby new requests for subsidy can be managed
- 6.6.4 Ensuring formal evaluation against agreed criteria.
- 6.7 The scoring mechanism ranks services into one of three categories of priority for funding, Low, Medium and High. Should there be a requirement to reduce expenditure, contracts which score in the low priority category would be considered first. Conversely new subsidised bus service requests would need to score in the High or Medium category in order to be considered.

The proposed scoring mechanism is based on three criteria – subsidy, accessibility and sustainability.

Subsidy per passenger – the cost per passenger carried. This places value on the cost of the service against the number of passengers carried

Accessibility – the extent to which the service provides access to priority areas / services. Designed to ensure that the Council pays for services which meet its priorities.

Sustainability – extent to which the service meets a continuing need. Designed to promote sustainability of the network, that resources are well targeted and that the contract is not there for a ‘niche’ requirement

Full scoring information is contained in the executive summary and full policy documents.

7. EQUALITY & DIVERSITY

7.1 An Equality Impact Assessment has been undertaken for these proposed changes and it will be reviewed prior to implementation. Consultation has already been undertaken with a wide range of interested groups including the Senior Citizen’s Transport Action Group, the Rural Transport User Group, the Bus Users Group and the Disability Forum

8. ENVIRONMENTAL IMPACT

8.1 There is no proposal to increase the use of bus services, therefore there should be no increase in CO₂ emissions.

9. LEGAL COMMENT

9.1 The Council is allowed to subsidise bus services required to meet social needs that would not otherwise be met. When it is deciding whether to award contracts for subsidised bus services, as well as having to have regard to the interests of the public and the public passenger transport service providers, the Council is also obliged to follow detailed tendering procedures. Legal advice will be provided as required in the implementation of any new policy

10. LINKS WITH CORPORATE PRIORITIES

10.1 This policy supports Sub Priority 4: Improving Access, Mobility and Public Transport, and, in particular ***‘Designing and managing a transport network which supports sustainable economic growth and promotes travel for all’***.

11. OPPORTUNITIES & RISKS

11.1 Opportunities

11.1.1 The adoption of this policy could allow savings to be realised from the annual spend on bus services

11.1.2 The policy puts a framework around current and future decision making

11.1.3 The policy allows the Council to move to a more considered and sustainable future funded network

11.2 Risks

11.2.1 The adoption of a Bus Subsidy Policy is not seen as a contentious issue, as can be seen from the consultation responses received. However, the application of the policy and potential removal of services could cause public concern as does any change to existing bus services

11.2.2 The subsidy per passenger element of the proposal has the potential to disadvantage rural passengers, where services will in the main be more expensive on a per passenger basis. Therefore, services in rural areas are scored in the highest bracket

11.2.3 The subsidy per passenger element of the proposal has the potential to disadvantage education funded routes as services are more expensive on a per passenger basis, therefore these services are scored in the highest bracket.

12. FINANCIAL IMPLICATIONS

12.1 The routes currently subsidised by the Authority are detailed in the table in Appendix 3 of the attached report.

12.2 Total gross spend on subsidised routes in 2008/09 was £706,580 which was part funded by Rural Bus Subsidy Grant of £130,650.

12.3 Savings of £74,120 on subsidised routes have been realised in 2009/10 as a result of retender and routes rationalisation. These savings are not attributable to the proposed bus subsidy policy.

12.4 The proposed bus subsidy policy aims to provide a framework for prioritising Council expenditure on subsidised bus routes, and hence provide a tool for identifying further budget savings.

12.5 If the policy is accepted and the categorisation of routes into high, medium or low priority has been finalised, further financial modelling will be carried out. This will provide an evaluation of the savings which could be achieved, together with a list of routes which would be affected. An important element of this financial modelling work will be to assess the likely impact on our allocation of Rural Bus Subsidy Grant of any changes to bus services.

12.6 The budget strategy for 2010/11 includes £600,000 to be delivered as savings from a number of initiatives identified through a review of the transport service undertaken by Northgate Kendric Ash. Savings generated as a result of the adoption of the proposed bus subsidy policy will contribute towards this savings target.

12.7 All subsidised bus routes are due to be reviewed in October 2010 and it is anticipated that the implementation of the new bus subsidy policy will coincide with the award of the new contracts.

13. WARD IMPLICATIONS

The report has Borough wide implications

14. BACKGROUND PAPERS

Appendix 1 Executive Summary

Appendix 2 Bus Subsidy Draft Policy

Appendix 3 Equalities Impact Assessment

End of Report

***Report prepared by Brian Cotter, Northgate Kendric Ash
Tel: 07971 952614***

Project Document	Executive Summary
Project Title	Bus Subsidy Proposal
Date & Version	March 2010 v1.0

The Council has a responsibility to make suitable travel accessible to as many people as possible. Key requirements are optimising access to local facilities including healthcare, education and employment, and reducing social exclusion

To this end the Council oversees an annual spend of £706,580 per year on the provision of enhancements to the existing commercially run bus services. This money is spent on providing bus routes which would not be commercially viable for the private sector operators.

To put the requirement in context, in Telford and Wrekin, 96% of the bus routes are normally commercially operated (by Arriva Midlands) and 4% are provided and subsidised by the council

The council has to ensure that the limited funds available are spent in the most effective manner. It is therefore suggested that a policy is adopted to underpin the decision making process. Every case for subsidy has its merits, and there are many considerations to take into account but not all routes can be adopted. This policy is to ensure that all of the many objectives and requirements are properly and formally considered and weighed in reaching the final decision on which routes to fund. In effect the policy will set out the Councils rationale and methodology for route provision and subsidy.

The suggested policy takes into account all the Councils Key Priorities, gives consideration to National Indicators and contains an Equalities Impact Assessment. Comments from representative groups, who were consulted during the process, are included.

The result of the application of the policy will be a transparent allocation of monies to meet the needs of rural areas and to provide service to new or changing populations and demographics.

Rationale & Methodology

The policy will use three priority scoring criteria:

1. **Subsidy per passenger** – the cost per passenger carried, designed to place value on the cost of the service against passengers carried in most circumstances

Subsidy per passenger	
1	>£2.50 or not known
2	£1.50 to £2.50
3	90p to £1.50
4	50p to 89p
5	<50p or covered by Rural Bus Subsidy Grant or Education funded route

2. **Accessibility** – extent to which the service meets priority transport areas for the Council. Designed to ensure that the Council pays for services which meet its' priorities

Accessibility	
1	<ul style="list-style-type: none"> • More than 50% of the route is inside the Borough of Telford & Wrekin
2	<ul style="list-style-type: none"> • Links to a site of new development (where use of S106 monies has increased the required subsidy per passenger) • Links to shared community facilities such as community centres accessed by older people and disabled residents
3	<ul style="list-style-type: none"> • Gives access to Leisure Facilities • Provides Access to World Heritage Site
4	<ul style="list-style-type: none"> • Links to an Industrial Area • Links to a neighbourhood area • Links to a site of new development (where use of S106 monies has not increased the required subsidy per passenger) • Links to key Rural Corridors which are in Borough
5	<ul style="list-style-type: none"> • Links to a Borough Town • Links to Princess Royal Hospital • Link to Telford Town Centre • Links to Secondary or Higher Education Establishment

3. **Sustainability** – extent to which the service meets a continuing need. Designed to promote sustainability of the network, that resources are well targeted and that the contract is not there for a 'niche' requirement

Sustainability	
1	service operates on Sundays only
2	service operates on Saturdays only or on Saturdays and Sundays only
3	service operates on Sundays and on weekdays and/or Saturdays
4	service operates on Mondays to Saturdays
5	service operates on Mondays to Fridays only

Routes will be scored against these three priority criteria and ranked either **LOW**, **MEDIUM** or **HIGH** in terms of their fit to these priority areas.

Score	Priority
20 or less	Low
21 to 30	Medium
More than 30	High

It is envisaged that should there be a requirement to reduce subsidy funding overall that two routes are used:

1. A general discussion is taken with Arriva Midlands to see how overall costs could be reduced (this could be general reduction in frequencies whilst keeping routes intact)
2. Officers from the ITU review the 'Low' priority routes

Dependent upon the required level of saving the transport professionals from the ITU will propose to cabinet the most appropriate mix of general reductions and contract removal based upon discussion with Arriva Midlands and review of the Low priority routes.

The policy also states how new requests for services should be managed through the use of Section 106 monies to initially stimulate demand with a view to moving routes to a commercial basis over time (before S106 monies run out). Thereafter, should the route not be commercial and additional budget is not available, the route would be scored in the same way as existing routes and a decision made as to whether the Council should fund it by removing an existing funded route.

It is envisaged that should there be a requirement to reduce the bus subsidy budget, the place to look first would be those routes in the **LOW** category.

It is intended that subsequent to the adoption of this policy, savings proposals will be presented to CMT for consideration.

Information on the Current provision of Services – 2008/09 Actual costs

The tables below detail the current provision of services where a subsidy payment is made:

Route	Frequency	Detail	£ 08/09	Support	Pgrs	Subsidy per Pgr	Cost to Council
66	Monday to Saturday Hourly	Shawbirch to Town Centre	£143,829		209,600	£0.68 (Now £0.35 upon retender in 2009)	£143,829
23		Telford to Oakengates					
24		Oakengates to Telford					
76/77	Monday to Saturday Hourly	Wellington to Coalport	£88,439	£130,644 (Rural Bus Subsidy Grant)	101,014	£0.87	£39,422 (Average Subsidy £0.24) Overall average subsidy £1.04
822	Monday to Saturday 2 Hourly	Telford to Rodington	£43,947		50,189	£0.87	
Wrekin Connect	Various	Various Rural Routes	£37,618		11,647	£3.23	
33/55 Sunday Services	Hourly/90 Mins	Blueline, Greenline and Oakengates to Princess Royal	£8,234		13,837	£0.59	£8,234
33/55 Evening Services	Hourly	Blueline	£58,108		38,087	£1.52	£58,108
44 Evening Services	Hourly	Madeley to Leegomery	£35,398		36,800	£0.96	£35,398
22/11 Evening	Hourly	Telford Town Centre	£33,421		53,168	£0.62	£33,421

Services		CircularTelford to Halesfield, Brookside to Telford					
Sub Total			£448,994	£130,644	514,342	£0.61	£318,412

Shared Services

Route	Frequency	Detail	£ 08/09	Shared With	Pgrs	Subsidy per Pgr	Cost to Council
701	2 Journeys a day term time only	Sutton Hill to Colleges	£51,436	CYP	7,034	£7.31	£122,512 (CYP pay £110,218)
702		Coalb'kdale to Colleges	£39,144	CYP	6,384	£6.13	
703		Little Wenlock to Well'ton Colleges	£31,934	CYP	7,857	£4.06	
341/2	Mon-Sat every 2 hours	Well'ton to Market Drayton	£66,279	Shrops CC	Not Available shared routes	Not Available shared routes	£66,729
96	Mon-Sat every 2 hours	Telford to Shrewsbury					
113/114	Mon-Sat up to 4 journeys per day	Telford to Bridgnorth					
81	Mon-Sat 3 journeys per day	Telford to Shrewsbury					
519	Mon-Sat Every 2 hours	Newport Shrewsbury	£57,153	Shrops CC	Not Available shared routes	£0.88	£57,153
481	Mon-Sat daytime	Telford to Stafford	£11,640	Staffs CC	Not Available	Not Available	£11,639

	half hourly Evenings and Sundays hourly				shared routes	shared routes	
Sub Total			£257,583				£257,583
Total			£706,580	£130,644			£575,933



TELFORD & WREKIN COUNCIL

BUS SUBSIDY POLICY

1 Introduction and Context

Bus Services were subject to deregulation in October 1986 as part of Transport Act 1985. As such any commercial operator can provide any service it wishes to provided that (under general rules) it gives 56 days notice of the introduction, withdrawal or timetable change of a service. The relevant authority for the control of services is the Office of the Traffic Commissioner and not the Local Authority, the relevant Local Authority where the bus services operate in effect has very little control regarding the operation of bus services except where the Authority operates a Quality Contract Scheme.

Additionally the legislation made provision for each Local Authority (or in the case of Metropolitan areas Passenger Transport Executive (PTE) to contract for services where under the normal working of the market such services would not be provided, these contracts are often referred to as socially necessary contracts or subsidised contracts. These services are generally sought for the following reasons:

- To provide weekend bus services
- To provide early morning or late evening services
- To provide services to areas of low population
- To provide services to areas of new or changing population demographics

The Council spends in the region of £706,580 each year on these services at a gross level or £576,356 at a net level (after grant funding). The council decides which routes it wishes to subsidise and the routes are tendered through the OJEU process. The full costs of running the services are borne by the Council as the operator supplies the vehicles and operates the timetables the council has tendered for.

It is these subsidised services that this policy seeks to address in order to:

- **Establish criteria against which new and existing contracts can be tested both in terms of value for money and socio-economic factors**
- **Create a framework which would allow decision making around the continued provision of services in terms of changing requirements both from a demand and supply point of view**
- **Establish rules and process whereby new requests for subsidy can be managed**
- **Ensure formal evaluation against agreed criteria**

Policy Context

The Environment and Rural area is a key priority for the Council. Sub Priority 4: Improving Access, Mobility and Public Transport identifies the actions undertaken to improve accessibility. These include;

- Designing and managing a transport network which supports sustainable economic growth and promotes travel for all
- N178 – Improving the number of bus services running on time and reducing average passenger waiting times
- N175 – Reducing social exclusion and optimising accessibility to local facilities including healthcare, education and employment by increasing the number of households within 15 minutes and 30 minutes of primary borough towns by public transport and walking

- N177 increasing the number of bus passenger trips originating in the borough

2 Policy criteria

It is clear that there are many ways in which we can approach this issue and many criteria which could be used as an eventual solution, it is useful therefore to focus upon what is important to Telford. The key reason why the Council spends money in this area is to increase accessibility to services for the citizens of the Borough to:

- Work
- Leisure
- Shopping
- Education
- Healthcare

It follows therefore that the criteria for provision of subsidised services should concur with these aspirations.

The proposal is to build a simple scoring mechanism which attempts to rank services in to one of three categories of priority for funding, Low, Medium and High. It follows then that should there be a requirement to reduce expenditure it is those contracts sitting in the low priority category that would be considered first. It is also possible for the Council to say that it will only consider any new subsidy request which falls in to the High or Medium category.

The proposed scoring matrix is:

Subsidy per passenger – the cost per passenger carried, designed to place value on the cost of the service against passengers carried in most circumstances	
1	>£2.50 or not known
2	£1.50 to £2.50
3	90p to £1.50
4	50p to 89p
5	<50p or covered by Rural Bus Subsidy Grant or Education funded route

Accessibility	
1	<ul style="list-style-type: none"> • More than 50% of the route is inside the Borough of Telford & Wrekin
2	<ul style="list-style-type: none"> • Links to a site of new development (where use of S106 monies has increased the required subsidy per passenger) • Links to shared community facilities such as community centres accessed by older people and disabled residents
3	<ul style="list-style-type: none"> • Gives access to Leisure Facilities • Provides Access to World Heritage Site
4	<ul style="list-style-type: none"> • Links to an Industrial Area

	<ul style="list-style-type: none"> • Links to a neighbourhood area • Links to a site of new development (where use of S106 monies has not increased the required subsidy per passenger) • Links to key Rural Corridors which are in Borough
5	<ul style="list-style-type: none"> • Links to a Borough Town • Links to Princess Royal Hospital • Link to Telford Town Centre • Links to Secondary or Higher Education Establishment

Sustainability – extent to which the service meets a continuing need. Designed to promote sustainability of the network, that resources are well targeted and that the contract is not there for a ‘niche’ requirement	
1	service operates on Sundays only
2	service operates on Saturdays only or on Saturdays and Sundays only
3	service operates on Sundays and on weekdays and/or Saturdays
4	service operates on Mondays to Saturdays
5	service operates on Mondays to Fridays only

We can test all of our existing routes against these criteria to give each a score. The proposed scoring brackets are as follows:

Score	Priority
20 or less	Low
21-30	Medium
More than 30	High

It is envisaged that should there be a requirement to reduce subsidy funding overall that two routes are used:

1. A general discussion is taken with Arriva Midlands to see how overall costs could be reduced (this could be general reduction in frequencies whilst keeping routes intact)
2. Officers from the ITU review the ‘Low’ priority routes

Dependent upon the required level of saving the transport professionals from the ITU will propose to cabinet the most appropriate mix of general reductions and contract removal based upon discussion with Arriva Midlands and review of the Low priority routes.

3 Proposals for managing new requests for service

New homes are being built within the Borough albeit that these may have abated in the current financial climate; nonetheless, it is prudent to lay out some proposed guidelines.

Section 106 funding is secured from developers and used wherever possible to enhance existing routes subject to the regulations attached to the funding. This may mean diverting a route through a development and funding additional mileage/time (if route permits) or enhancing frequency of service, length of operation etc. The alterations are made with the aim of moving the service towards becoming commercial so that the operator takes on the costs. The risk is that the funding is too small to make enough substantial changes to the route and the service does not become commercial, meaning that the council has to decide whether to continue to subsidise the route after the Section 106 funding is spent or the service is downgraded to the previous level of support.

The proposed mechanism covers the period after which the S106 monies run out.

Appendix 1 – Policy Consultation comments

DRT & Bus Subsidy Consultation

Attendees

Name	Group Represented
Gordon Frost	Arriva
Anne-Marie Davis	Senior Citizens Forum
Juanita Case	Transport Action Group
Roger Aveley	Scrutiny
Stephanie Jones	Scrutiny
Caroline Oakes	Rural Access
Helen Hill	Integrated Transport Unit
Brian Cotter	Northgate Kendric Ash
Sarah Bass	Business Efficiency Team
Matthew Arnold	Northgate Kendric Ash
Roland Brown	Disability Group
Joan Green	Representing Chris Mayo Carers Partnership Board
Tina Jones	CVS User Lead Disability Group
Dave Wade	CVS Manager
Ann Watkins	Bus User Group

DRT Comments

- Twister needs at least 24hrs notice to book a seat
- Dial a ride is just for the urban area and operated in off peak times
- Twister is rural covering Wrockwardine and Wenlock at present

- Not all present knew about the all the options
- Can users get their shopping trolleys on the bus – the tartan pull along type not the ones you put a £1 in!!!!
- Twister is wheelchair accessible but this will reduce the amount of seats available
- Demographics indicate that we have an aging population in rural areas

- The current travel plan is due to come to an end in 2011 and we will be out for extensive consultation next year to develop the new 5 yr plan

- Important to understand the actual running costs of the vehicles we may want to use if we increase fleet.

- Dorset were the Beacon authority for DRT but now resident would rather jump on a scheduled bus than book a bus
- Hampshire stopped all DRT except for 1 in the New Forest.
- Fixed rather than flexible routes had the best patronage
- More links to Parishes within the Parish Charter to open up the evenings and weekends to volunteer drivers who may use the fleet vehicles out of hours to run their own youth community buses to link to town centre amenities

- Ensure that the detail of how many disabled people accessing DRT and in general, the buses, is correct
- DDA issues with Arriva – drivers still leaving wheelchair passengers at side of road if pushchair users are on there first
- Dial A ride has to be booked at least a week in advance to get a seat and is always full in the first 30 mins the phone lines open.

Subsidy

- Ensure that the overall populous is considered with this and not just a blanket of residents
- Understand VFM but don't just cut costs – establish what is actually needed
- Yes go for it!!

Appendix 2 – Example subsidy policies

Example 1

Stirling Council

They operate a scoring mechanism as follows:

Scoring Criteria

Accessibility – extent to which alternative public transport service is available at most individual are served	
1	alternative within 1 hour during daytime at same location
2	alternative within 1 hour during daytime no more than 1.5 miles (2.4 km) distant
3	alternative within 2 hours during daytime at same location
4	alternative within 2 hours during daytime no more than 1.5 miles (2.4 km) distant
5	no reasonable alternative

Access to Employment – extent to which people travelling to/from work can use service	
1	no journeys serving a major or subsidiary employment centre
2	at least (a) one journey arriving at a subsidiary employment centre between 07:00 and 09:00 AND (b) at least one journey leaving a subsidiary employment centre between 17:00 and 19:00.
3	at least (a) one journey arriving at a subsidiary employment centre between 07:00 and 08:00 AND (b) at least one journey arriving at a major employment centre between 08:00 and 09:00 AND (c) at least one journey leaving a major employment centre between 17:00 and 18:00 and (d) at least one journey leaving a major employment centre between 18:00 and 19:00.
4	at least (a) one journey arriving at a major employment centre between 07:00 and 09:00 AND (b) at least one journey leaving a major employment centre between 17:00 and 19:00.
5	at least (a) one journey arriving a major employment centre between 07:00 and 08:00 AND (b) at least one journey arriving at a major employment centre between 08:00 and 09:00 AND (c) at least one journey leaving a major employment centre between 17:00 and 18:00 and (d) at least one journey leaving a major employment centre between 18:00 and 19:00.

Social inclusion – extent to which service is used by people over 60 and/or disabled	
1	no more than 10% of passengers are concessionary
2	more than 10%, but no more than 20% of passengers are concessionary

3	more than 20%, but no more than 30% of passengers are concessionary
4	more than 30%, but no more than 40% of passengers are concessionary
5	more than 40% of passengers are concessionary

Subsidy – financial performance in terms of subsidy per passenger.	
1	subsidy per passenger is more than £15
2	subsidy per passenger is more than £10, but no more than £15
3	subsidy per passenger is more than £5, but no more than £10
4	subsidy per passenger is more than £1, but no more than £5
5	subsidy per passenger is no more than £1

Sustainability – extent to which service operates at times when demand is low.	
1	service operates on Sundays only
2	service operates on Saturdays only or on Saturdays and Sundays only
3	service operates on Sundays and on weekdays and/or Saturdays
4	service operates on Mondays to Saturdays
5	service operates on Mondays to Fridays only

The evaluation will be carried out separately by two officers and any differences in evaluation discussed with mediation from a third officer as necessary

This approach allows a simple score for each service as in the following example:

Criteria	Score
Accessibility	5
Employment	4
Social Inclusion	3
Subsidy	5
Sustainability	3
Total	20

Using this kind of scoring matrix allows all services to be ranked in terms of score and therefore in terms of the values that the Council deems are important to it.

In addition it proposes rules where scores are equal:

The evaluation is to be carried out independently by two officers and any differences in evaluation discussed with mediation from a third officer as necessary

And, where scores are equal **and** there is a decision to be made about providing the service or not, it proposes the following rules:

If several services score equally but not all can be implemented then officers would:

- ***Carry out more detailed evaluations taking account of cost and local conditions***
- ***Consider other means of funding services including contributions for other organisations***
- ***Consider other means of meeting needs including Demand Responsive transport***
- ***Written records and details to be kept***

Example 2: Lancashire County Council

At Lancashire County Council (LCC), up to March 2006 a simple test of sustainability of a subsidised route was utilised:

- 1. The service was required to meet 20% of its' overall cost**
- 2. The service should incur a subsidy of no more than £2 per journey**

From March 2006 LCC introduced a more sophisticated, detailed and considered approach which recognised rural and urban areas of the bus network and sought to prove both value for money and link with Council priorities, full details below:

a. Bus Support Strategy (other than areas defined as rural):

1. Withdraw the financial threshold for service support of no more than £2 per passenger journey. This causes a distortion in favour of providing subsidy for short distance services over longer distance services and takes no account of the value of an individual service in helping meet the County Council's objectives and the Shared Priorities.
2. Use a threshold for the minimum proportion of the cost of a supported service, including any proposed new services arising out of accessibility planning, to be met by users through the fare box. This will normally be 40 percent for all new or renewed contracts. This is based on the premise that 40 percent cost recovery is a reasonable indicator that a service is well supported by the public and that it is fulfilling a variety of need.
3. Introduce a value for money test for existing or new services where less than 40 percent of the cost is or estimated to be met through the fare box. The test will be based on the measured contribution of the service to the County Council's objectives. This will allow the County Council to prioritise the bus services it financially supports in accordance with its core objectives and the availability of financial resources at any one time.

4. Identify services that have the greatest potential within the supported network for passenger growth (with the relevant operator where part commercial) and develop quality enhancement packages aimed at both increasing ridership and reducing the level of financial support.

b. Rural Bus Service Support Strategy (areas eligible for RBSG)

The County Council will be looking towards supporting the best mix of fixed bus services, flexible bus services, and voluntary/community transport to meet the needs of rural residents and to provide access to the countryside.

The County Council will use RBSG to maintain a core rural bus network with a threshold for the minimum proportion of the cost of a supported service to be met by users through the fare box. This will normally be 40 percent. Services where, generally, less than 40 percent of cost is being met through the fare box, will be subject to a value for money test based on their overall contribution to the County Council's objectives.

The scoring system will be the same as the core supported network. However, rural services will be subject to an additional weighting reflecting the lower levels of population, the longer distances travelled and to take into account the wider benefits of such services to the rural economy, and in providing access to essential opportunities and services.

Three levels of public transport (including flexible services) have been defined for rural areas:

Category A - Services providing direct links between major centres but serving intermediate areas classed as rural

These services are mostly provided on a commercial basis on at least an hourly frequency but with the County Council sometimes financially supporting journeys at certain times of the day or week. Usually more than 80 percent of the route mileage would be within areas classed as rural and at least 70 percent of journeys across the week operated on a commercial basis.

Services falling into this category have significant potential to be developed further in that they:

- Provide links between the main urban centres of the County and into neighbouring areas and could offer an alternative to the private car;
- Offer the widest opportunities for people in the rural communities served to access essential services;
- Offer the biggest opportunity within rural areas to effect some transfer of existing journeys from car to public transport;
- Offer the potential for local interchange points with other rural services operating on a demand responsive basis, including through ticketing.

The County Council will:

- Identify with the relevant operators those services that have the greatest potential for passenger growth based on a service development package that will bring significant accessibility benefits to the rural communities served;
- Consider establishing, during the Local Transport Plan period, a budget to enter into possible "Kickstart" agreements where the County Council considers the service

development package will bring the enhanced service to commercial viability within a set period of time;

- Prioritise emerging proposals in order to achieve maximum benefit for the available financial resources.

Category B – Services that provide direct links between market towns or into major centres/market towns from larger rural settlements

These are services that would provide the core rural bus network funded primarily through RBSG and have the following characteristics:

- Unlikely to be provided on a commercial basis;
- At least 80 percent of the route mileage would be within areas classed as rural;
- Have the potential to play a significant role in providing transport from rural areas to education establishments;
- Offer the potential for local interchange points with other rural services operating on a demand responsive basis, including through ticketing;
- Have a limited demand responsive element to allow smaller nearby settlements or nearby tourist destinations to be served as required;
- Have the potential to give greater value for money in the longer term through the inclusion of the service in a rural “kickstart” initiative.

The County Council will define the routes falling into this category and adopt the following target minimum service level benchmark to be achieved by the end of the Plan period:

Target Minimum Service Level Benchmark:

Rural Population served by the route*	Employment/ Training	Shopping	Healthcare/ Hospital
2,000 - 4,000	2 per day Mon-Sat	3 per day Mon-Sat	2 per day
4,000 - 10,000	Minimum 2-hourly service 0700-1900 Mon-Sat		Included

*Defined as population living within 400 metres walking distance of the route outside the major centre or market town (where over 10,000 in population).

For the purposes of determining the revenue to cost ratio of providing a service, where statutory schoolchildren are carried, the County Council will determine the cost of alternative provision and deduct this from the price of the contract.

Category C - Serving rural populations of under 2,000 people

As mentioned above, the County Council's experience with “one size fits all” solutions to meeting the transport needs of rural communities has not always achieved best value.

Where conventional bus services (including flexible services) are provided or proposed, they will be expected to meet the core criteria for financial support as detailed above and will be subject to a value for money test (including the rural weighting and an allowance for any statutory schoolchildren) where at least 40 percent of cost is not met through revenue.

For settlements classified as rural and not served by the core rural bus network defined above, the County Council will consider the best value solutions that are available to meet the accessibility needs of those communities based on the priorities to be established in the County Council's Accessibility Strategy. This will include options such as demand responsive transport, community based solutions including social car schemes, or integrating with other available transport in the area such as that provided for Special Education Needs or Social Services Clients, or integrated with transport provided for local Primary Care Trusts. The County Council will refer options for meeting accessibility needs to the relevant Local Accessibility Partnership.

c. Community and Accessible Transport Strategy

In 2003/4, community transport schemes carried over 216,000 passengers. The demand for community transport (CT) services is ever increasing and outstrips supply. The County Council has provided additional financial resources to increase the provision of CT services and new weekend and evening services have been provided in various parts of the County. The County Council presently financially supports 7 CT groups providing dial-a-bus and dial-a-ride services and fifteen community car schemes.

CT services must be considered as an integral part of the public transport network although barriers to the full integration of services do still exist. The main barrier is that CT providers generally operate dial-a-ride and dial-a-bus services under Section 19 of the Transport Act 1985.

This restricts use to certain groups of the public. However, a growing number of CT groups have become full PSV operators and the County Council intends to give every encouragement to other non-PSV groups to obtain this status. This will allow such groups to play a full part in the provision of local transport services especially where recognised needs cannot be met cost-effectively through the provision of a conventional bus service as per the proposed criteria as set out below.

The County Council's Community Transport policies are set out in Appendix H.

d. Value for Money Test for Conventional Bus Services

The County Council is proposing to use the test as set out in Table 3.2. As mentioned, the test is designed to ensure that where conventional bus services are operating at below 40 percent cost recovery, the money spent is targeted at the County Council's accessibility priorities. Whilst the County Council considers that services/contracts that achieve a score of above 30 will be considered to achieve value for money, the table is also designed to allow the County Council to prioritise the services it supports when the available revenue budgets are insufficient to cover all the demands placed upon it. **This methodology was under development at the time of publication of this Bus Strategy and was expected to be fully implemented by Autumn 2006. The scoring system below has been adopted by the County Council as an intermediate methodology for prioritising service support, but this may change over time.**

Table 3.2 – VALUE FOR MONEY TEST FOR CONVENTIONAL BUS SERVICES MEETING LESS THAN 40% OF THEIR COST FROM REVENUE

CRITERIA	MEASURE	SCORE*
AVERAGE PASSENGERS PER JOURNEY INCLUDING STATUTORY SCHOOLCHILDREN (derived from surveys or ticket machine data)	20 or more	10
	15 to 20	8
	10 to 15	6
	5 to 10	4
	1 to 5	2

<p>PRIMARY JOURNEY PURPOSE (Either direct or via an interchange) Where a journey has more than one primary journey purpose the score will be combined.</p>	<p>Employment Shopping Education/Training Health Facilities Journey supporting access to the evening economy Access to leisure and youth facilities Other</p>	<p>10 10 10 10 1 3 3</p>
<p>RURAL SERVICES WEIGHTING</p> <p>Services where at least 80% of the route mileage is within areas classed as rural.</p>	<p>General weighting Provides access to Areas of Outstanding Natural Beauty or tourist "honeyspots" Provides for leisure visits to the countryside other than above</p>	<p>10 8 4</p>
<p>INDEX OF MULTIPLE DEPRIVATION FOR EACH WARD SERVED (Where availability of alternative public transport is greater than 400 metres)</p>	<p>Worst 5% 5-25% 26-50% 51-75% 76-95% Best 5%</p>	<p>20 16 12 8 4 0</p>

Appendix 3 – Subsidised Routes as of March 2010

The tables below detail the current provision of services where a subsidy payment is made with 2008/9 actual costs.

Route	Frequency	Detail	£ 08/09	Support	Pgrs	Subsidy per Pgr	Cost to Council
66	Monday to Saturday Hourly	Shawbirch to Town Centre	£143,829		209,600	£0.68 (Now £0.35 upon retender in 2009)	£143,829
23		Telford to Oakengates					
24		Oakengates to Telford					
76/77	Monday to Saturday Hourly	Wellington to Coalport	£88,439	£130,644 (Rural Bus Subsidy Grant)	101,014	£0.87	£39,422 (Average Subsidy £0.24) Overall average subsidy £1.04
822	Monday to Saturday 2 Hourly	Telford to Rodington	£43,947		50,189	£0.87	
Wrekin Connect	Various	Various Rural Routes	£37,618		11,647	£3.23	
33/55 Sunday Services	Hourly/90 Mins	Blueline, Greenline and Oakengates to Princess Royal	£8,234		13,837	£0.59	£8,234
33/55 Evening Services	Hourly	Blueline	£58,108		38,087	£1.52	£58,108
44 Evening Services	Hourly	Madeley to Leegomery	£35,398		36,800	£0.96	£35,398
22/11 Evening Services	Hourly	Telford Town Centre Circular Telford to Halesfield, Brookside to Telford	£33,421		53,168	£0.62	£33,421
Sub Total			£448,994	£130,644	514,342	£0.61	£318,412

Shared Services

Route	Frequency	Detail	£ 08/09	Shared With	Pgrs	Subsidy per Pgr	Cost to Council
701	2 Journeys a day term time only	Sutton Hill to Colleges	£51,436	CYP	7,034	£7.31	£122,512 (CYP pay £110,218)
702		Coalb'kdale to Colleges	£39,144	CYP	6,384	£6.13	
703		Little Wenlock to Well'ton Colleges	£31,934	CYP	7,857	£4.06	
341/2	Mon-Sat every 2 hours	Well'ton to Market Drayton	£66,279	Shrops CC	Not Available shared routes	Not Available shared routes	£66,729
96	Mon-Sat every 2 hours	Telford to Shrewsbury					
113/114	Mon-Sat up to 4 journeys per day	Telford to Bridgnorth					
81	Mon-Sat 3 journeys per day	Telford to Shrewsbury					
519	Mon-Sat Every 2 hours	Newport Shrewsbury	£57,153	Shrops CC	Not Available shared routes	£0.88	£57,153
481	Mon-Sat daytime half hourly Evenings and Sundays hourly	Telford to Stafford	£11,640	Staffs CC	Not Available shared routes	Not Available shared routes	£11,639
Sub Total			£257,583				£257,583
Total			£706,580	£130,644			£575,933

Step 5 New and Emerging Policies

Name of Lead Officer: Helen Hill

Portfolio: Environment & Regeneration

Business Unit: ITU

Name of Policy / Function being assessed: Bus Subsidy

For new and emerging strategies / policies / functions that will require approval at Director's Board or Cabinet, this equality impact assessment process should be completed during development, and prior to presentation at Director's Board.

1. What is the scope of the policy/function/practice?

<p>Think about:</p> <ul style="list-style-type: none"> • Explaining the policy or function to an outsider • What does it include? • What does it not include? • Who is it chiefly aimed at? 	<p>The Council subsidises some existing bus routes which would not be commercially viable for the private sector operators. This is to support the Councils responsibility to make suitable travel accessible to as many people as possible; optimising access to local facilities including healthcare, education and employment, and reducing social exclusion</p> <p>In Telford and Wrekin, 96% of the bus routes are normally commercially operated (by Arriva Midlands) and 4% are provided and subsidised by the council</p> <p>The council has to ensure that the limited funds available are spent in the most effective manner. It is therefore suggested that a policy is adopted to underpin the decision making process.</p>
---	--

2. What is the purpose of the above?

<p>Think about</p> <ul style="list-style-type: none"> • What is it trying to do? • What does it aim to achieve? • Would examples help to explain it? 	<p>Every case for subsidy has its merits, and there are many considerations to take into account but not all routes can be adopted. This policy is to ensure that all of the many objectives and requirements are properly and formally considered and weighed in reaching the final decision on which routes to fund. In effect the policy will set out the Councils rationale and methodology for route provision and subsidy in terms of value for money, accessibility and sustainability.</p>
---	--

3. Who is defining or has defined the strategy policy / function and who implements it?

<p>Think about</p> <ul style="list-style-type: none"> • Is it based on national guidelines or requirements? • Is it based on custom and practice? • Has it grown out of past policies? • Who is involved in its development? Managers/Staff/ elected members/service users? 	<p>This is a completely new policy that has been defined by senior council officers and officers in the Integrated Transport Unit (ITU). ITU and Northgate Kendric Ash (NKA consultants) have been involved in the development of the policy along with cabinet members.</p> <p>The policy proposals will go through CMT, CAP and to Cabinet on the 23rd March 2010</p> <p>The Policy will be adopted by the council and applied by Officers and members when deciding on which routes to subsidise.</p>
---	---

4. Who are all of the groups of people or organisations that are affected by this policy or function? (for example: customers / service users / partners / staff)

<p>Think about</p> <ul style="list-style-type: none"> • Internal and external people • Staff, partners, contractors, service users, potential service users, lead bodies, • national or regional bodies • Voluntary sector groups or organisations 	<ul style="list-style-type: none"> • Council Officers and Members • Bus users • Voluntary User Groups • Bus operators • Transport Commissioner
--	---

5. Who are the key people to be involved in the assessment process?

<p>Think about</p> <ul style="list-style-type: none"> • A small team of people with sound knowledge and understanding of the policy or function 	<p>The Transport Steering Group will oversee the assessment process of the policy: Jonathan Rowe – Head of Environmental Services Helen Hill – Integrated Transport Unit</p>
--	--

<ul style="list-style-type: none"> Someone with understanding of the information / data related to this work Possibly a “critical friend”, someone who is one step removed from the policy or function who can ask questions you may not ask yourself. 	<p>Julia Copus- Finance Manager Sarah Bass -Business Efficiency Team Brian Cotter/Chris Marsh - NKA</p> <p>Integrated Transport officers will be involved in testing the policy</p>
--	---

6. What equality specific data is readily available to help the development of this policy?

<p>Think about</p> <ul style="list-style-type: none"> Profile of users Local statistics / census data Output information Local / National research Benchmarking information Complaints/Comments/ Compliments Informal feedback <p>Also think about how this data can be broken down to inform you about the different equality groups</p>	<p>No specific data is available but views of rural and urban bus users, senior citizens, disability and carers forum groups have been taken in to account.</p>
---	---

7. What are the particular issues for the groups below in relation to this policy?

Age	General Access to bus services throughout the day
Disability	General Access to bus services throughout the day
Gender/Transgender	General Access to bus services throughout the day
Racial group	General Access to bus services throughout the day
Religion or belief	General Access to bus services throughout the day
Sexual orientation	General Access to bus services throughout the day
Location/ Urban / Rural	General Access to bus services throughout the day in areas where demand is low
Deprivation	General Access to bus services throughout the day

8. How are you proposing to address the above issues within the policy?

Age	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by older people
Disability	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by disabled people
Gender/Transgender	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by voluntary groups
Racial group	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by voluntary groups
Religion or belief	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by voluntary groups
Sexual orientation	Ensure the policy weightings cover not only residential requirements but community social facilities such as community centres that are accessed by voluntary groups
Location/ Urban / Rural	Ensure that the policy does not unduly discriminate against location
Deprivation	Ensure that the policy does not unduly discriminate against location

9. Before you finalise your policy, who are you consulting with or planning to consult with?

<p>Think about:</p> <ul style="list-style-type: none"> • Who are you consulting with as part of the development process. • Can you monitor your consultees to assess if all groups are being reached? • Is it one particular Equality and Diversity strand of customer (i.e. disabled people) that your amendments need to focus on • Do you need to involve partner agencies/ staff members / national organisations in this consultation exercise? • What is your time scale? • Do you need to speak to the Council's Consultation, Research & Information Manager? (Extension 80132) 	<p>The policy proposal will be considered by CMT and CAPS and ratified by Cabinet on the 23rd March 2010</p> <p>The current subsidised routes are subject to competitive tender action in April and the policy is to be in place to support this process.</p>
--	--

10. What format is your consultation taking / going to take?

The council needs to take a co-	Meeting have been held with bus operators
---------------------------------	---

<p>ordinated approach to consulting with the community , therefore please liaise with your PEG reps / CALM Group in ACC / and recorded your consultation on the Consultation Register?</p> <p>Think about</p> <ul style="list-style-type: none"> • Have you already got a group you participate with (for example a bus users group that is representative of the identified groups you wish to consult with) • Have you discussed with your PEG members whether a joint approach could be made? • Have you identified any overlap with other service areas /partnerships where joint consultation could take place • Are you aware of the council's consultation strategy and support available through policy? (for example community panel) • Have you planned that it may take more than one consultation exercise to get the information you are after? 	<p>and bus users groups as well as Senior Citizen and Disability Forums to discuss the proposal of a policy and what it should consider. They outcomes of these meetings have been reflected in the final report and development of the policy.</p>
---	---

11. How are you planning to give feedback to the people who have been consulted?

<p>Think about</p> <ul style="list-style-type: none"> • Letting the consultees aware of where the documentation will be published • Asking the consultees if they would be willing to be “critical friends” in the future 	<p>Feedback will be give following agreement to proceed at the scheduled forum meetings of the rural bus users group, bus users group, senior citizens forum and disability forum.</p> <p>Feedback will also be given to the bus operators during the re tendering process.</p>
---	---

12. How are you going to monitor the equality impact of this policy or function on customers in the future?

<p>Think about</p> <ul style="list-style-type: none">• Monitoring forms• User information• Output information• Local / national research• Benchmarking information• Complaints/comments/compliments• Informal feedback• User groups	<p>Through the existing national indicators and feedback from the various forums</p>
--	--

13. What do you anticipate the longer term equalities outcomes will be as a result of this EIA?

A more considered and sustainable approach to subsidising bus routes which will prove best value for the money spent.

Sign Off Process for Assessments completed at Step 5

Head of Service Approval

The outcomes of equality impact assessments need to be built into best practice within Portfolios. Within your Portfolio there will be a mechanism for ensuring that outcomes and awareness of any issues to be addressed are fed into existing management structures at Head of Service level. Heads of Service should be aware of the outcomes of your EIA before its approval at PEG

Approval at PEG

Your PEG is responsible for keeping records of EIAs to be conducted and completed and for "signing off" the EIA.

Dates of PEG meetings and the details of PEG Lead Officers are available on the Intranet. Please keep your PEG Lead informed on progress with your EIA.

Inclusion in Report to Directors / Cabinet

The Council's report format contains a section on equality and diversity issues. This is where you will identify any issues that have arisen so decision makers are aware of them. *(insert link to Council's report format)*

Finally, summary report.

The Council has a legal duty to publish the outcomes of EIAs and will meet this duty by placing summary reports on the Council's website. A Summary Report Template is available for you to "cut and paste" key points from your assessment for publication. Please send your summary report to your PEG Lead.

A [summary report template](#) is available to help with this process.

Thank you for strengthening the Council's work on equality and diversity by conducting this equality impact assessment

Equality Impact Assessment Completion Sheet

To be completed at the end of:

Step 5 – for new and emerging policies

Name of Lead Officer.....

Portfolio.....

Name of Policy / Function

.....

The Equality Impact Assessment for the above has been completed to the end of Step 5

Date approved at PEG

End of Step 5

TELFORD & WREKIN COUNCIL

CABINET – 23rd MARCH 2010

REFOCUSING THE ROLE OF LOCALITY WORKING – SUPPORTING DELIVERY OF OUR PRIORITIES

REPORT OF ASSISTANT CHIEF EXECUTIVE

1. PURPOSE

- 1.1 To set out proposals to revise the focus of the former Locality Management Service, and to seek approval for the proposed role of the team on supporting delivery of the Council's priorities and outcomes against key targets and objectives.

2. RECOMMENDATIONS

- 2.1 **That approval is given to changing the focus of the former Locality Management Service from responding directly to issues that are identified at a local level, to delivering on issues that are a priority for the Council, and for the service to no longer be organised on a geographic Cluster basis, apart from within the identified rural areas.**
- 2.2 **That the revised role of the team in providing a 'rapid response' to tackling priority issues, delivering key actions within the Priority Plans, improving outcomes against the Council's performance priorities and delivering consultation and community engagement activities to support the delivery of these priorities, is endorsed.**

3. SUMMARY

- 3.1 Proposals to roll out Locality Management were presented to CAPS on 14th September 2009. Feedback at this meeting identified that the role of the team in responding directly to local issues was seen to duplicate the role of the Elected Ward Member as the lead in dealing with issues of local concern. Concern was also raised about the delivery of the service on a geographic Cluster basis, which was seen to be confusing to Members and residents and as potentially adding another layer between local areas and services. It was requested that a further report be brought back to CAPS that addressed these concerns.
- 3.2 It is proposed that Locality Management is not rolled out as was originally suggested and that the focus of the team is changed. The revised role of the service would be to deliver a 'rapid response' to dealing with issues that don't fall clearly within one service area, and that present a potential threat to the delivery of the Council's priorities or its reputation. The team would also provide additional support in

delivering against the Council's strategic priorities, by supporting the delivery of some elements of the Priority Plans, and facilitating delivery against priorities identified through our planning and performance framework. The team would also provide additional capacity to deliver more in depth consultation and community engagement activity in line with the Council's priorities. Cabinet and CMT would take a lead role in identifying the key areas of work for the team, the processes and criteria for establishing this work programme are summarised in Appendix 1.

- 3.3 A Scrutiny Review of the Locality Management pilots was scheduled for 2009. A meeting of the Review Group was held on 16th September 2009 at which the Members of the group were advised that a revised approach to Locality Working was being developed. It was therefore agreed that a full Scrutiny Review would not take place, but the group would be given the opportunity to comment on any proposals prior to them being submitted Cabinet. A number of Scrutiny Special Interest meetings have been held and Members have had the opportunity to comment upon a draft CAPS report. The points of further clarification sought by Scrutiny have been incorporated into this revised report wherever possible.

4. PREVIOUS MINUTES

Reports on Strategic Locality Management were presented at the Corporate Directors meetings on the following dates; 9.7.06, 31.7.07, 5.12.07, and 27.1.08. A report on implementing Locality Management was presented at CAPS on 14th September 2009.

5. INFORMATION

5.1 BACKGROUND

- 5.1.2 Proposals to roll out a model for Locality Management based upon the learning from the South Telford and Newport and Rural pilots were presented at the 14th September CAPS meeting. Concerns were raised about the focus of Locality Management on responding to and addressing local issues. It was felt that the proposed approach would lead to duplication of the role of the Elected Ward Member whose role it is to take the lead in dealing with issues on behalf of the residents in their Ward. It was also felt that the focus on geographic Cluster areas for delivering Locality Management were confusing to both Elected Members and residents and potentially added an unnecessary additional layer between services and the local area. There was seen to be benefit from having a geographic focus in the rural area in relation to supporting the Rural Forum and taking forward the Rural Plan, and support was given to the continued geographic focus on the rural area, in line with Council priorities.
- 5.1.3 Locality Management was identified as the subject of a Scrutiny Review and a meeting of the Review Group was held on 16th September 2009. At this meeting Members also raised concerns about the duplication of the role of Ward Members when dealing with local

issues, and also found the Cluster arrangements to be confusing. Members were advised of the need to find a more sustainable model for Locality Working and that further proposals were being developed. It was therefore agreed not to hold a full Scrutiny Review and the Lead Cabinet Member agreed for Scrutiny to comment on the proposals prior to submission to Cabinet. A number of Special Interest Meetings were held which provided Scrutiny Members the opportunity to comment on the proposed model.

5.1.4 Scrutiny Members agreed that the pilot arrangements for Locality Management needed to be reviewed and sought further clarification on the following points; the role of Elected Members, links to the Council's regeneration programme, working relationships with partners and the LSP, processes for prioritising the workload of the team, the transition arrangements within the 2 pilot areas, and how the new way of working would be evaluated. This report has been amended to provide further clarification on these points. Members also asked for details of consultation on the revised model. Consultation with key stakeholders has been ongoing throughout the pilot projects and the outcomes of this have contributed to the new model. However, as the pilot was only being delivered within 2 areas of the Borough an extensive consultation on the revised arrangements is not proposed. Council Members, through CAPS and Scrutiny have been involved as part of the review process and meetings will be held with key partners to discuss these proposals. Members also wanted details of the proposed structure of the team; these proposals are being developed as part of the wider review of Council structures so aren't currently available.

5.2 Re-focusing the Role of Locality Management

5.2.1 In order to address the issues raised at the CAPS meeting and by Scrutiny Members, it is proposed that the pilot for Locality Management is not rolled out. It is proposed to redefine the role of the service whilst building upon some of the strengths of the pilot Locality Management approach. The CAPS meeting identified that the work of the team was seen to add greatest value when it had supported the delivery of the Council's strategic objectives. Successes had been seen in developing the Council's rural agenda, and playing a key role in the delivery of the Council's programme of regeneration. Scrutiny also identified the need for the team to continue to support the Council's programme of regeneration. It is therefore proposed that the work of the team focuses upon supporting the delivery of the Council's strategic objectives, rather than responding directly to local issues. The focus on geographic Clusters was not seen by CAPS, to add value, therefore the team will no longer be organised in this way and will work on specific priorities that may be focused within a particular location, or across the whole Borough. It is proposed that there is a period of transition from the Locality Management Model in South Telford and Newport to ensure that priority areas of work can be sustained. As part of this transition, discussions will be held with partners, Ward Members and the community to ensure the impact of the transition is minimised. The working arrangements for the rural area will remain unchanged, as it was felt that a geographic focus on the rural area provided added

value, and supported the Council's priority for addressing the needs of the rural community.

5.2.2 It is suggested that Locality Management is not rolled out in line with the previous model and the role of the former Locality Management Team is revised. This will also involve changing the name of the team to more closely represent its revised remit in delivering against priority actions and focusing on the rural area. It is suggested that there would be three aspects to the approach of the team.

- **Providing a 'rapid response' to unforeseen issues that arise and create a threat to the delivery the Council's priorities or reputation**
- **Carrying out a planned programme of work that supports improved outcomes against our strategic priorities**
- **Providing additional capacity to deliver more in depth consultation and community engagement in the delivery of our strategic priorities.**

The processes and criteria for identifying these key areas of work are outlined in Appendix 1. The team would deliver against these priorities by working, where appropriate, in partnership with other Council services, partner organisations, Town and Parish Councils and residents. When working in a specific location the team would work closely with Elected Members, arrangements for working with Elected Members are outlined later within the report. The work of the team would be targeted at delivering actions that lead to improved outcomes against the Council's strategic priorities.

5.3 Identification of Key Areas of Work

5.3.1 Providing a 'Rapid Response' Service

The need for the Council to develop and deliver against its strategic priorities can mean that there can be little capacity as an organisation to respond to unexpected issues. These unforeseen issues can be identified either at a strategic or local level, such as significant resident dissatisfaction with a local area as occurred within Sutton Hill. These issues often do not fall easily within the remit of one service area or agency, and require the involvement of a range of services. The team would be in a position to provide a 'rapid response' in order to gain a greater understanding of the issue and to develop a range of actions to address them. This would allow the Council to have a faster response to dealing with issues that may have a detrimental affect upon either performance against key indicators or to the reputation of the Council, further information on the criteria for a 'rapid response' is detailed in Appendix 1. These issues could be identified by Cabinet or CMT or at a local level by Ward Members or residents. The issues may be complex and although they require a fast response, the measures required to address them may require a longer term approach.

5.3.2 Supporting the Delivery of the Council's Priorities

Those issues within the Priority Plans that require a partnership approach and significant community consultation and engagement could be delivered through the team. As part of the Priority Planning process a number of issues requiring additional actions to ensure delivery would be identified and allocated to the team, this may include areas of work such as supporting the delivery of the Borough Towns Initiative or other regeneration programmes across the Borough. A prioritised work programme for the team would be developed and agreed on an annual basis. The team's role would be to bring together partners and key stakeholders to identify and deliver a range of actions and interventions. A key element of the delivery against these priorities would be the engagement of Elected Members and local residents. This work may be focused within a particular Ward, or across several Wards in the Borough. The team could also provide additional capacity and support in delivering against the Council's planning and performance framework. Those issues that have been identified as requiring improvements in achieving performance and outcomes could be identified within the team's work programme. The role of the team would be to bring together the appropriate services and stakeholders to gain a greater understanding of the issue and to identify and deliver a range of actions to improve outcomes. Dependent upon the issue this may involve working closely with Ward Members, Town and Parish Councils, residents and a wide range of partners. These issues would be identified and agreed through the appropriate Cabinet Members and Corporate Directors.

5.3.3 Often issues that are identified at a local level, but are a priority for the Council, are dealt with on an ad-hoc or individual basis. One of the ways that the Council and partners currently respond to those issues is through 'Operation Clean Sweep', which involves a week of co-ordinated partnership activity within a specific area to address community safety and environmental issues that have been identified as a priority by residents. It is proposed that a strategic intelligence-driven approach is taken to the delivery of this activity, providing the opportunity to address a wider range of issues, focusing on issues that are both a strategic and local priority, resulting in a greater impact upon the satisfaction of residents. It is proposed that this partnership activity be planned as part of the programme of consultation and engagement activity delivered through the 'Your Community Matters' events. This would involve the 'Operation Clean Sweep' being re-branded to represent a wider focus than community safety and environmental issues. The team would lead on the organising these events as part of their role in delivering the 'Your Community Matters' engagement programme.

5.3.4 Consultation and Community Engagement

The Council delivers a wide range of consultation activity, much of which is delivered through surveys or questionnaires. This approach is certainly appropriate for some consultation activities; however, there

can also be a need for more in depth consultation that can involve face to face discussions, focus groups and more intensive community engagement. The team has a proven track record of engaging and empowering communities to become more involved in decisions that are made about their area, and would be in a position to provide this support across a range of issues. This consultation and engagement activity would be focused upon those issues that are of strategic importance to the Council and would be directed as part of a corporate programme of activity.

5.4 Working with Elected Members and Town and Parish Councils

5.4.1 Relationship with Cabinet

As identified above much of the work of the team would be driven by the Council's strategic priorities through the Priority Plans and therefore there would be a close link with the relevant Cabinet Member. Progress against priorities would be reported through the new Priority Boards, or through the Council's planning and performance framework. Also regular briefings and progress reports would be made to the relevant Cabinet Member on priorities relating to their area of responsibility, and to CAPS as required, updates would also be given to Ward Members on specific pieces of work in their area. The work of the team would be within the remit of the Cabinet Lead for the 'Efficient, Community Focused Council' Priority Plan.

5.4.2 Relationship with Ward Members

Having changed the focus of the team away from directly responding to local issues it is envisaged that there would not be a duplication of the role of Ward Members. However, it would still be crucial that Ward Members are closely involved with any pieces of work that are carried out within their Ward. The team would involve Ward Members in developing and delivering actions that impact upon their area. Ward Members would also be involved in community engagement or consultation activity that takes place within their Ward, ensuring that their role as the lead for that area is not duplicated or undermined. Regular briefings would also be held with Ward Members.

5.4.3 Working with Town and Parish Councils and other Partners

The team would continue to support Town and Parish Councils through the Parishes Forum and through the Parish Charter. The Officer responsible for the rural area would continue to lead on the monitoring and further development of the Parish Charter, and would be the lead within the team on issues relating to Town and Parish Councils. The team would work closely with Town and Parish Councils on activities or projects that are carried out within their Parish, which would provide the opportunity to work more closely with Parishes on issues of importance to both Telford and Wrekin Council and the Town and Parish Councils.

As the lead in organising the programme of 'Operation Clean Sweeps' (to be renamed/badged), the team would pull together the appropriate

partner organisations to ensure a joined-up approach to planning the events and delivering actions to address particular issues. The team would also continue to work with partners to support delivery of our priorities, as outlined earlier.

The responsibility for determining the mechanism for co-ordinating partner activity on a geographic (Cluster) basis would, in future, fall within the remit of each Priority (Thematic) Partnership, and would no longer be led by this team, however the team would be working with partners on specific priority pieces of work. The outcomes of these pieces of work would be reported through the appropriate LSP structures. It is envisaged that issues that need to be dealt with on a geographic Cluster basis would be determined through the performance and planning arrangements within each Priority Partnership.

5.5 Performance Management

5.5.1 The performance arrangements for the team would include identifying improved outcomes against key performance indicators, and progress against key actions within the Priority Plans. However some of the issues that the team will be dealing with will be complex and some improvements may be longer term, and the outcomes more difficult to measure. Therefore, other measures would also be used to assess the impact of the team, such as increased levels of community engagement and capacity, or satisfaction with resolution of a particular issue. The performance management framework for the team will link to and support corporate performance management arrangements.

5.7 Equality and Diversity

5.7.1 The work of the team would be directed at those areas and issues that have been identified as a priority to the Council through its assessment of needs. Equality is a priority for the organisation and the work of the team would assist in gaining a greater understanding of some of the equality issues in delivering services within the Borough. The proposed community consultation and engagement activity will provide an opportunity to gain a greater understanding of the needs of all of our communities within Telford and Wrekin. An Equality Impact Assessment has been completed on Locality Management, much of which would also apply to the revised remit of the team. The EIA identified the need for community engagement activity to be monitored against the 6 equality strands wherever possible, to ensure that all communities are being engaged. The work of the team would provide an opportunity to target those communities whose views may be seen to be under represented. The former EIA will be revised to take account of any changes to the way in which the team works.

5.8 Environmental Impact

5.8.1 One of the roles of the team would be to help to develop sustainable solutions to ongoing issues that are experienced across the Borough, and to support the delivery of key actions within the Priority Plans. It is

envisaged that this work would have a positive impact upon the environment, and through community engagement activity also lead to more sustainable solutions to local environmental issues.

5.9 Legal Comment

- 5.9.1 A number of Government strategies and papers seek to foster greater locality working to improve the quality of lives within neighbourhoods and communities. How the Council implements locality working is a matter for the Council.
- 5.9.2 Under section 183 Local Government and Public Involvement in Health Act 2007 a new “duty to involve” was introduced in respect of best value authorities on 1 April 2009; this seeks to embed an engagement and empowerment culture and requires authorities to inform, consult and involve local residents and other stakeholders.
- 5.9.3 If it is proposed to devolve any powers to officers then appropriate delegations will need to be sought to ensure powers can be exercised in accordance with Local Government Act 1972 and 2000 provisions.

5.10 Links with Corporate Priorities

The role of the team would be to support the delivery of the Council’s Corporate Priorities by supporting the delivery of actions within the Priority Plans. Some of the team’s work would be identified through the priority planning process, also the community consultation and engagement activities will be delivered in support of achieving the Council’s Corporate Priorities.

5.11 Opportunities and Risks

In proposing this action, the Corporate Risk Management Methodology has been complied with. This approach is not intended to eliminate risks but to identify the risks and manage them. However not all risks can be managed all of the time and some risks may not have been identified.

The following key risks and opportunities associated with this action have been identified and assessed and arrangements will be put in place to manage them.

- Increased expectations in delivering positive outcomes against complex or longstanding issues
- Securing funding to maintain the service beyond 2011
- Lack of engagement of key partners including other Council services

5.12. Financial Implications

- 5.12.1 The 2009/10 budget for the Team is £720.4k. This covers the costs of the Business Manager, 3 Locality Managers, 4 Neighbourhood Co-ordinators, admin support and general overheads. In 2009/10 funding

is available through mainstream budget totalling £429.6k, LPSA reward grant of £200.2k and the Cohesion grant totalling £90.6k.

5.12.2 A total of £900k was allocated to Locality Management through the LPSA reward grant. This is one off funding and will fund the current structure until 31st March 2011. The Cohesion grant is available through the Area Based Grant allocated through the government's current 3 year settlement. This grant increases to £140k in 2010/11 however it is unclear as to whether this funding will continue in the next 3 year government settlement cycle. For planning purposes it has been assumed that this funding will not be available. As a result in 2011/12 there will be a budget shortfall of £268.5k based on the current structure of the team. This budget gap has not been built into the current budget strategy for the Council.

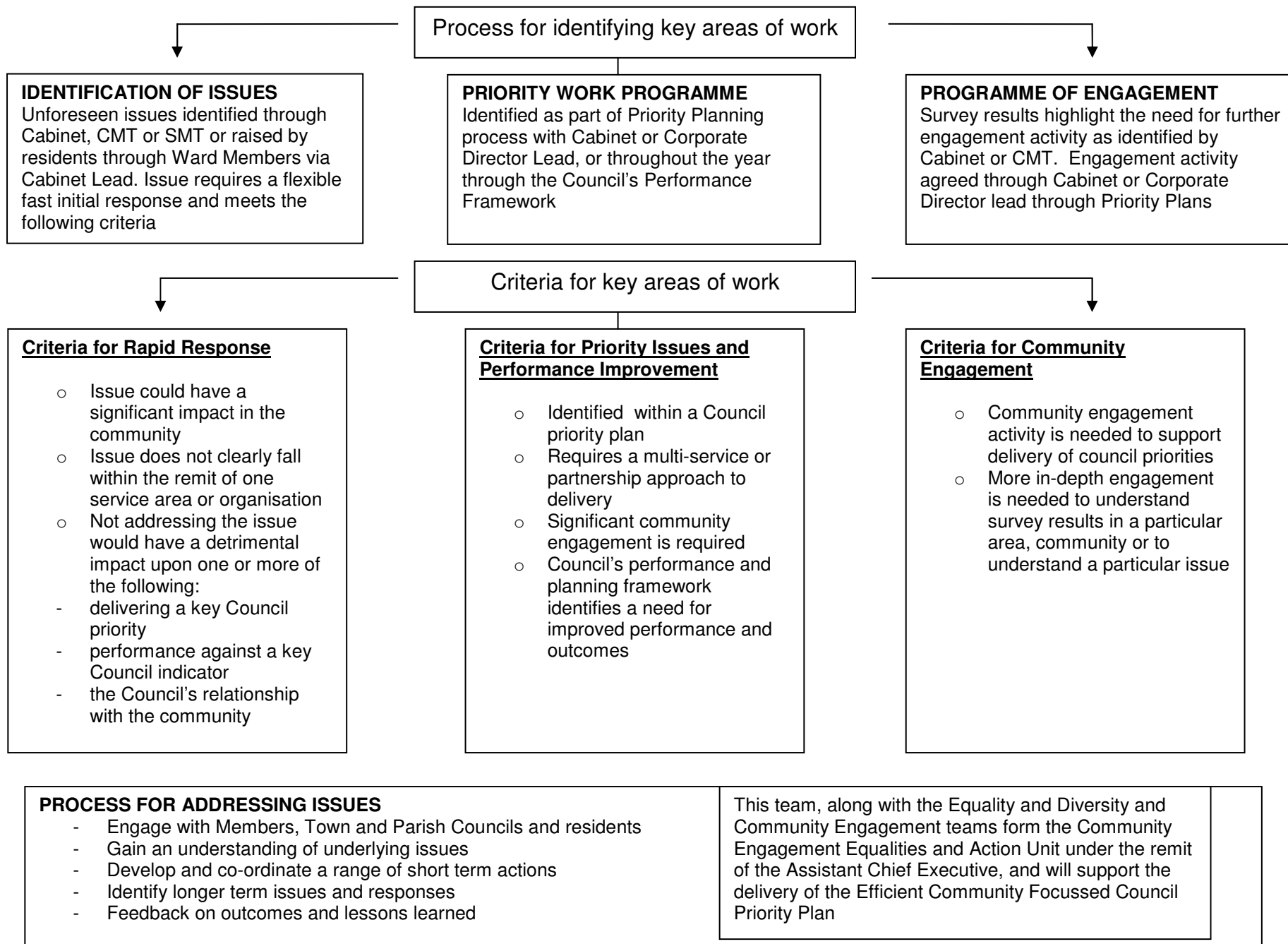
5.12.3 In addition to the revenue funding outlined above a capital allocation of £10k per year for 2008/09, 2009/10 and 2010/11 was allocated to Locality Management.

6. Ward Implications

The role of the team in supporting the delivery of Council's corporate priorities has implications across all Wards within the Borough. The report outlines arrangements for ensuring that there are close working relationships with Ward Members when the team are working within their Ward.

Report prepared by

***Rachael Jones
Community Engagement Equalities and Action Manager
Community Engagement Equalities and Action Team
Telford and Wrekin Council
Tel: 01952 382135***



TELFORD & WREKIN COUNCIL

CABINET – 23rd MARCH 2010

COUNCIL TAX – DISCRETIONARY DISCOUNT & NATIONAL NON DOMESTIC RATES – DISCRETIONARY RATE RELIEF

REPORT OF HEAD OF LEISURE & CUSTOMER SERVICES (including Revenues & Benefits)

1. PURPOSE

- 1.1 To review guidelines for relief of business rates and council tax in specific limited circumstances.

2. RECOMMENDATIONS

- 2.1 That the proposed new guideline for awarding discretionary Council Tax discount in certain prescribed circumstances be approved as detailed at Appendix 1.
- 2.2 That the refreshed guidelines for the granting of discretionary rate relief for rural businesses be approved as detailed at Appendix 2.
- 2.3 That the refreshed guidelines for the granting of discretionary rate relief for charitable, voluntary and non profit making bodies be approved as detailed at Appendix 3.
- 2.4 That the refreshed guidelines for the granting of hardship rate relief be approved as detailed at Appendix 4.
- 2.5 That Cabinet approve the introduction of a new scheme to review the decision of the Head of Leisure & Customer Services where a taxpayer is dissatisfied with her decision as detailed at Appendix 5.

3. SUMMARY

- 3.1 The Local Government Act 2003 inserted section 13A into the Local Government Finance Act 1992, to enable Councils to reduce the amount of Council Tax payable by Council Tax payers. This allows the Council to introduce a local scheme to meet local situations which are not covered by national discounts and exemptions and provides billing authorities with powers to reduce the charge for individual properties or classes of property by any amount as it sees fit, including remission of the full amount of tax payable.
- 3.2 There are several discretionary business rate relief schemes currently in operation which provide relief to charitable organisations, non profit making bodies, rural businesses and to ratepayers suffering hardship. Members last approved the guidelines for granting discretionary rate relief at a Cabinet meeting on 11th February, 2002.

4 INFORMATION

Council Tax

- 4.1 Billing authorities have unlimited discretion to reduce the Council Tax charge for individual properties or classes of property. This gives Local Authorities powers to introduce local discounts not already covered by the national discount scheme. However Cabinet Members should note that the loss in Council Tax revenue resulting from the granting of local discounts has to be met in full by the billing authority.
- 4.2 The paragraphs below give an outline of those discretions.
- 4.3 The Authority can reduce or remit the amount of Council Tax due, and could, for example introduce a discount to meet local situations. Examples of where discretion could be exercised might include (i) major flooding; (ii) national emergency such as Foot and Mouth; (iii) natural disasters; (iv) other exceptional circumstances.
- 4.4 Where a tax payer is subject to a factor, as exemplified in paragraph 4.2 and it has not been necessary to vacate the property there is no statutory discount or exemption that can be applied and, therefore, the tax payer remains liable to pay the tax as demanded. The ability to award a local discount in such cases will provide the Council discretion to reduce or remit the amount of tax payable.
- 4.5 It is proposed that the determination of applications be delegated to the Head of Leisure & Customer Services or her nominated officer on a case by case basis only. It is also proposed that the creation of classes of case should however be referred to Members; for example if there was a natural disaster and a large number of properties were affected it may result in it being impracticable to deal with on a case by case basis.

Business Rates

- 4.6 The rural rate relief scheme provides 50% mandatory relief to sole small general stores, post offices, pubs and petrol filling stations and all small food shops within pre-designated rural settlements. Councils can top-up this relief up to 100%, and can also provide 100% discretionary rate relief to any small village business which may not qualify for mandatory relief, although there are financial consequences for the Council.
- 4.7 Discretionary Rural Rate relief is currently awarded in accordance with guidelines approved by Cabinet in 2002. Details of awards made in the current financial year are shown in the table in 4.13.
- 4.8 Charitable relief (including relief to other non profit making bodies) is currently awarded in accordance with guidelines approved by Cabinet in 2002.
- 4.9 The guidelines for awarding discretionary charitable rate relief are very narrow and do not allow blanket policies to apply in deciding whether discretionary relief is appropriate or not. This is a requirement of the legislation.
- 4.10 Hardship relief is a discretionary power to award rate relief to relieve hardship for businesses. In considering applications for rate relief the Council must have regard for the interest of the Council Tax payers within the authority. This includes the cost to the community and the benefit or disadvantages of awarding hardship relief. The Council must also be mindful of precedents for all similar cases which are set by individual decisions including their financial cost to the Council.
- 4.11 As a decision to grant hardship relief is discretionary when considering an application the Council must be satisfied that :-

a) The ratepayer would sustain hardship if the Council did not grant a remission.

And

b) It would be reasonable for the Council to grant remission having regard to the interests of the Council Tax payers within the Authority.

4.12 In accordance with government guidelines hardship relief should only be granted in the most exceptional circumstances.

4.13 The funding position for all rate relief and details of awards made in the various categories, in accordance with the current guidelines are shown in the tables below.

	Legislative Provisions For Discretionary Relief (Local Government Finance Act 1988)	Mandatory Element Of NNDR Liability Fully Funded By Central Government	Percentage Of Discretionary Element Funded By Central Government	Percentage Of Discretionary Element Funded By T&W Council
Charitable Occupation	s47(2)(a)	80%	25%	75%
Non Profit Making Bodies	s47(2)(b)	0%	75%	25%
Rural Business To Which Mandatory Relief Applies	S47(3A)	50%	75%	25%
Other Small Rural Businesses	S47(3B)	0%	75%	25%
Community Amateur Sports Clubs	S47 (2ba)	80%	25%	75%
Hardship Relief	s49	0%	75%	25%

Relief Type	No. of Properties	% of relief awarded	Amount of relief awarded £	Percentage Of Discretionary Element Funded By BTW	Financial Cost to T&W for 2009/10
Mandatory Charitable relief	235	80%	£2,272,072.97	0%	Zero
Mandatory Rural Rate relief –	7	50%	£5,645.39	0%	Zero
Discretionary Rural Rate Relief	7	50%	£7367.16	25%	£1,841.79

Discretionary relief – Children & young people	33	20%	£17,770.39	75%	£13,327.79
Discretionary Relief – local culture & heritage	23	20%	£47,412.15	75%	£35,559.11
Discretionary Relief – credit unions	3	20%	659.60	75%	£494.70
Discretionary Relief – Public Halls	33	20%	£44,604.51	75%	£33,453.38
Discretionary Relief - disabilities	16	20%	£22,814.40	75%	£17,110.80
Community Amateur Sports Clubs Mandatory	11	80%	£21,834.70	0	Zero
Community Amateur Sports Clubs discretionary	0	20%	0	75%	Zero
Other	28	20%	£45,038.51	75%	£33,778.88

4.14. The cost to the Council for the awards of discretionary rate relief for the current financial year is £135,566.46. The data was extracted from the Revenues & Benefits data base as at 22nd October 2009.

4.15. In addition, delegated authority should be updated for the awarding of any discretionary rate relief. In effect this means that the Head of Leisure & Customer Services or her nominated representative will have delegated authority to award any of the discretionary relief's outlined in this report and contained in the legislation.

4.16. Members should also be aware that if any existing guidelines are amended which disadvantage a ratepayer, a 12 month advance notification must be given to the ratepayer before increased rates become due and payable. Increased business rates would not take effect until the 1st of April following the 12 month period.

5. EQUALITY AND DIVERSITY

5.1 An Equality Impact Assessment on the revised approach has been approved by the Head of Service. A copy of the impact assessment can be made available on request.

6. ENVIRONMENTAL IMPACT

6.1 There are no environmental impacts.

7. LEGAL COMMENT

- 7.1 The Council has the power and discretion to introduce and implement the discretionary relief schemes as proposed in the report. Further legal advice will be provided if required.

8. LINKS WITH CORPORATE PRIORITIES

- 8.1 The Council aims to protect vulnerable members of the local community and to alleviate hardship where possible. The use of Section 13A to introduce a locally defined discount on a case by case basis, or classes of case, in accordance with the guidelines contained in this report would promote these aims of the Council. The award of charitable relief and hardship relief for businesses also links to these council aims.

9. OPPORTUNITIES AND RISKS

- 9.1 Withdrawal of part or the entire discretionary relief scheme could affect the financial viability of some businesses which would lead to criticism of the council. This is particularly the case given the current economic climate.

10 FINANCIAL IMPLICATIONS

- 10.1 Section 13A of the Local Government Finance Act 1992 enables local authorities to reduce the amount of council tax payable in individual cases or classes of case i.e. to grant local discounts, over and above discounts already granted in the national discount scheme. The ability to give local discounts is only available to billing authorities, such as Telford & Wrekin Council, and the billing authority must meet the full cost of granting such discounts. To-date, Telford & Wrekin Council hasn't awarded any local discounts under this legislation. The proposed guidance will be used to consider any applications received where the Council might exercise its discretion and each application will be considered on its own merits. It is anticipated that there will not be a significant number of awards so the financial impact will be low.
- 10.2 NNDR relief is currently granted providing relief to charitable organisations, non profit making bodies, rural businesses and ratepayers suffering hardship. Where the relief granted is mandatory then the cost is fully funded by central government. Where a discretionary element is granted the cost falls directly on the Council's budget. Details of the types of relief and costs for 2009/10 are shown in para. 4.13 of the report. It is anticipated that the existing budget will be sufficient to cover any discretionary relief awarded in accordance with the proposed guidelines.
- 10.3 In both cases applications for relief/discount will be dealt with on their own merits however it is important that the financial implications of any precedent set is also considered when decisions are made.

11. WARD IMPLICATIONS

- 11.1 Borough wide

12. BACKGROUND PAPERS

Sections 42, 43, 47, 49 Local Government Finance Act 1988 (As Amended)
Local Government Finance Act 1992
Local Government Act 2003

Report Prepared by:-
Sophie Lane
Revenues Manager
(01952) 383 838

DISCRETIONARY COUNCIL TAX DISCOUNT GUIDELINES

The Council has discretion to reduce or remit Council Tax for a particular case or classes of case that is not covered by statute set discounts or exemptions.

Criteria for consideration:

These guidelines seek to set criteria that the Council should take into account when considering applications for a reduction in the amount of Council Tax payable. The Council should have defined criteria which will be taken into account when determining an application for discretionary discount.

The council will consider the following in determining applications:-

- Whether the taxpayer has been forced to vacate or partially vacate the property due to serious damage caused by external environmental factors beyond their control.
- Whether the taxpayer has suffered a significant degree of discomfort / inconvenience or upheaval as a result of the change caused by external environmental factors beyond their control.

Where a property has been affected the extent and nature of damage and the degree to which the property has been affected / vacated and the type of property e.g. main home, holiday home, second home etc will be factors in determining an application.

Each case will be considered on its merits however the following criteria should be met for each case:-

- The Council Tax Payers financial circumstances will be taken into account.
- All entitlement to Council Tax Benefit, discounts and exemptions must be applied prior to consideration of an application.
- The Council must be satisfied that the Council Tax payer has taken all reasonable steps to resolve their situation prior to making the application.
- The Councils finances will allow for a reduction to be made.

Applications:

Applications for discretionary discount must be made in writing from the tax payer, their advocate/appointee or recognised third party acting on their behalf by completing a discretionary discount application form, and outlining the reasons why a discount should be awarded. The applicant should explain the impact of not awarding a discount.

The applicant should specify the amount of discount being claimed.

Each discretionary discount award will be time limited for a maximum period of 12 months or less if the property becomes fully habitable. The level of award can be altered following a review period or where there is a change in circumstances during the award period.

Council Tax remains payable as demanded whilst applications are being considered.

RURAL RATE RELIEF GUIDELINES

Rural businesses are defined in the appropriate legislation and must be located in a rural settlement as defined by the rural settlement list published by the Council by the end of December each year.

Criteria for consideration:

Where the property does not fall within the mandatory provisions the following conditions apply:-

- The property is used for purposes which are of benefit to the local community, **and**
- It would be reasonable for the billing authority to make such a decision having regards to the interest of its Council Tax payers.

In the cases of:-

- Sole Post Offices
- Sole General Stores
- Sole Public Houses
- Sole Petrol Filling Stations
- Food stores

applications for discretionary relief to top up the mandatory 50% already awarded will be considered favourably.

The following should be taken into consideration when deciding whether discretionary relief should be awarded:-

- Whether the business employs a significant number of staff who are resident in the local community in which the business is located.
- Whether there are any other suppliers of the service concerned which are easily accessible to residents within the rural settlement.

Applications:

Each application for relief will be considered on its own merits.

Every applicant for discretionary rate relief must submit the latest available trading accounts or equivalent/relevant documentation and evidence as to the proportion of expenditure attributable to rates.

In determining the application, the Authority will give some consideration to the financial viability of the business concerned, thereby having regard to the interests of the council tax payers in general. This will be balanced by the detrimental effect on the rural community should the business have to cease trading either as a direct or indirect result of not awarding relief.

Awards for discretionary rural rate relief will be restricted to businesses with a net profit of less than £30,000 for the financial year that the application relates to.

Any entitlement to relief will only be considered by application from the ratepayer or his/her/company nominated representative.

Every applicant for discretionary relief must state how, in their opinion, the business benefits the local community.

Every applicant for discretionary relief must state what, in their opinion; the local community would lose if rate relief were not awarded.

Rates remain payable as demanded whilst applications are being considered.

**CHARITABLE, COMMUNITY AMATEUR SPORTS CLUBS
& NON PROFIT MAKING BODIES
RATE RELIEF GUIDELINES**

Criteria for consideration:

Discretionary Rate Relief can be granted under three specific circumstances:-

1. The Ratepayer is a registered charity (or community amateur sports club) or trustees for a charity and the property is wholly or mainly used for charitable purposes. Mandatory relief will already have been granted, so 'Top Up' relief and can be anything from 0-20%.
2. The property is not an excepted property and all or part is occupied for the purposes of one or more institutions or organisations not established or conducted for profit & whose main objects are charitable or otherwise philanthropic or concerned with education, social welfare, science, literature or the fine arts. This relief can be granted from 0-100%.
3. The property is not an excepted one and is wholly or mainly used for the purposes of recreation and all or part of it is occupied for the purposes of a club or society or other organisation not established or conducted for profit. This relief can be granted from 0-100%.

(An excepted property is a property occupied by either a Billing or Precepting Authority)

'Top up' relief:

Top up relief will be granted in the following circumstances:-

1. Where the aims and objectives are specifically to help children and young people, in line with council priorities. This will generally exclude organisations principally established for the education of children and young people. Relief may be considered where the provision of education is wholly provided for the benefit of disadvantaged groups.
2. Where the aims and objectives of the organisation are to enhance the provision of local culture and heritage, including theatres and dramatic societies.
3. Formally designated credit unions.
4. Public halls, community centres, and learning centres.
5. Organisations specifically formed to support disadvantaged groups such as people with disabilities, those with a terminal illness, drug and alcohol misuse, the elderly.

Where the property is occupied as a charity shop, it should be used wholly or mainly for the sale of goods donated to the charity and the net proceeds of the sale of goods are applied to the purpose of the charity.

Organisations which do not qualify for mandatory relief:

The same criteria as detailed in 1-5 of the top up relief shown above will be considered.

Additionally, the award will be granted where the council is satisfied that:

1. The organisation meets local needs and benefits local people, providing a valuable service to the community
2. The organisation permits access to all sections of the community, or has restricted access to a specific sector of the community for justifiable reasons such as addressing inequality.
3. The individual ratepayers interests are balanced against the interests of the Council Tax payers of the Borough.

Organisations which are used for the purpose of recreation / club:

Between 0-100% relief may be awarded taking into account the following factors:-

1. Access to the organisation

- Is membership open to all sections of the community?
- Are membership rates set at such a level as to exclude the general community?
- The ratepayer must be able to show that the criteria by which it considers applications for membership are consistent with the principles of open access.
- Are facilities at the premises made available to people other than the members?
- Are the majority of members mainly resident in the borough?

2. Provision of facilities

- Whether the organisation provides facilities which would not otherwise be available in the local community.
- Whether the organisation provides facilities complementary or of a higher standard to those already available
- Have the facilities available been provided by self-help or grant aid?

3. Other considerations

- Is the organisation affiliated to local or national organisations? I.e. are they actively involved in local/national development of their interests?
- Is the organisation encouraging community participation and development?
- Every applicant for discretionary relief must state how, in their opinion, the organisation benefits the local community.
- Every applicant for discretionary relief must state what, in their opinion the local community would lose if rate relief were not awarded.
- Does the organisation operate a bar, and if so what profit is made from this.

Applications:

Each application will be determined on its own merits.

Applications for relief must be submitted in writing together with all supporting documentation such as audited accounts, constitution and membership details

In all cases rates remain payable as demanded whilst applications are being considered.

HARDSHIP RATE RELIEF – GUIDELINES

Criteria for consideration:

Hardship relief is granted at the discretion of the Council which can reduce or remit the amount of rates due, provided it is satisfied that:-

- The ratepayer would sustain hardship if the authority did not do so **and**
- It is reasonable for the authority to do so, having regard to the interests of the persons subject to its council tax.

There is no statutory definition of hardship and, therefore, in accordance with government guidance (issued in 2002), the following will be considered:-

- The test of “hardship” need not be confined strictly to financial hardship; all relevant factors affecting the ability of a business to meet its liability for rates will be taken into account.
- The interests of council taxpayers in the area may be wider than direct financial interests. For example, where the employment prospects in the area would be worsened by a company going out of business, or the amenities of an area might be reduced.
- Where the granting of relief would have an adverse effect on the financial interest of the taxpayers the case for reduction or remission may still, on balance, outweigh the cost to the taxpayers.
- The ratepayer must provide evidence of hardship e.g.: severe loss in trade, a marked decline in trade compared to corresponding periods in previous years.
- The business must be viable.

Reduction or remission on the grounds of hardship should be the exception rather than the rule. In accordance with Government guidelines hardship relief should only be granted only in the most exceptional circumstances.

Application:

Each application will be considered on its own merits.

An application for relief must be made by completing a hardship rate relief application form.

Applications must detail the following:

- An outline of the reasons why relief should be given;
- the impact on the business of not awarding relief;
- the amount of expenditure attributable to rates
- a suggestion of the amount of rate relief that is being claimed.

We aim to give you a decision on your application within 30 working days of receiving all information required to process it.

Copies of accounts for the last three years will be required when submitting an application for relief.

Relief will be granted for short periods of time which could be renewed following a review.

Rates remain payable as demanded whilst applications are being considered.

APPENDIX 5

DISCRETIONARY RELIEF REVIEW PROCESS

Where a ratepayer is dissatisfied with the decision of the Head of Leisure & Customer Services or her nominated officer a review process will be instigated.

Where the taxpayer is dissatisfied with the initial decision in respect of an application for discretionary rate relief, the review will be considered by a Corporate Director following consultation with the appropriate Cabinet Member.

The ratepayer is required to submit details in writing giving their reasons as to why the decision should be subject to a review.

Requests for a review of the decision can be made against unsuccessful applications or against the level of discretionary rate relief awarded where a partial award has been granted and must be made within 30 working days of being notified of the decision.

Applications may only be made by the original applicant or an agent / representative appointed by the applicant.

Each application will be considered on its own merit.

The decision of the Corporate Director and Cabinet Member is final. Where the tax payer remains dissatisfied with the decision the appeal route is by way of judicial review.

Notification of the outcome of the decision will be made in writing within 14 days of the decision being made.

Business Rates remain payable as demanded whilst applications are being considered.

TELFORD & WREKIN COUNCIL

CABINET - 23 MARCH 2010

ST LUKE'S CATHOLIC PRIMARY SCHOOL - PINWOOD AVENUE PLAYING FIELD

REPORT OF THE HEAD OF PROPERTY & DESIGN

1 PURPOSE

- 1.1 The purpose of this report is to seek approval to the installation of fencing to secure the junior football pitch located on the playing field at Pinewood Avenue, Trench. The report also seeks approval to provide the local community with reassurance as to the future use of the remaining field by applying to have the land voluntarily registered as a village green.

2 RECOMMENDATIONS

- 2.1 **That Cabinet approve that delegated authority be given to the Head of Property & Design to apply for planning permission for the installation of fencing around the junior pitch located on the playing field at Pinewood Avenue, Trench.**
- 2.2 **That Cabinet approve that delegated authority be given to the Head of Property & Design to make an application for voluntary registration of the land shown hatched on the plan attached at Appendix A as a village green.**

3 SUMMARY

- 3.1 In 2000/01 a fencing scheme to secure a part of the existing St Luke's site was installed, and whilst this protected the school buildings, it left the playing field unprotected.
- 3.2 The school has for some time been unable to use the school playing field as it has been used by dog walkers and the consequential health and safety implications of this use has prevented the children being able to access the provision. In addition, the implication of the more rigorous Safeguarding element of recent OfSTED inspections has substantially increased the need to address this issue.
- 3.3 The local community has for a number of years had unrestricted access to the Pinewood Avenue playing field, as it has been perceived by residents as a community facility, and strong concerns have been voiced by local people that this should remain the case. The area of land accommodating the football pitch is considered by Department for Children, Schools and Families to be a school playing field. Consequently, whilst the Council wishes for the whole playing field to remain accessible to the local community, the requirements of the OfSTED

inspectorate do need to be taken into consideration. By voluntary registering the remaining unfenced portion of the playing field as a village green, this would provide residents with certainty over the future use of the open land external to the enclosed football pitch.

- 3.4 The area of the playing field proposed to be fenced (see Appendix A) would remain available to the community out of school hours as the kissing gate would not be secured or locked. This would allow local residents use of the football pitch when not in use by the school, and would alleviate many of the problems associated with dog fouling etc. which has been a concern for the school and the Council previously.

4 PREVIOUS MINUTES

- 4.1 There are no previous minutes.

5 INFORMATION

- 5.1 The Council has been consulting with local residents about the use of the playing field at Pinewood Avenue. The opportunity for all users including St Luke's Catholic Primary and the local community is of priority concern, particularly the need to use the football pitch as required. The main issue to address is to ensure that the football pitch can be separated from the remainder of the open field during the school day. This would allow the St Luke's pupils to use the football pitch and would not prevent local residents wishing to access the site.
- 5.2 In early 2009 a village green application for the whole of the playing field at Pinewood Avenue was submitted by Wrockwardine Wood and Trench Parish Council on behalf of local residents. Consultation meetings hosted by the Parish Council, with attendance from Telford & Wrekin Members and Officers, were held with local residents to discuss the related issues. As a consequence it has now been agreed between all parties concerned to proceed with the planning application for the fencing of the football pitch and to apply to voluntarily register the remaining area of the field as a village green.
- 5.3 The site is designated as Green Network therefore any form of development would be contrary to planning policy.

6 EQUALITY AND DIVERSITY

- 6.1 The proposals detailed in the recommendations to this report would help to promote the Council's equality commitment in terms of:
- Provision of a secure playing field area for the school which will ensure that all pupils have the opportunity to benefit from a full physical education curriculum.
 - By registering the remaining playing field as a village green, this would ensure that the open space will be available for all local people into the future.

- The proposals for the junior pitch include improvements to allow access to the junior pitch for disabled users by providing a pathway and accessible kissing gate for wheelchair users.

7 ENVIRONMENTAL IMPACT

- 7.1 The football pitch would be enhanced as part of these proposals, and registering the land as a village green would ensure its future as public open space.

8 LEGAL COMMENT

- 8.1 Registration of land as a village green means that the land cannot be used in future for any purposes which are inconsistent with village green purposes (i.e. development of the land would be prohibited). The Council, as registration authority, has the power to accept applications for voluntary registration of village greens and the power to register the land. Ongoing legal advice regarding the application process will be given.

9 LINKS WITH CORPORATE PRIORITIES

- 9.1 The specific proposals will contribute to the realisation of the Council's Priority Plans with particular emphasis in respect of:
- Children & Young People (optimising the health and well-being of children, ensuring children & young people grow up in safety and security);
 - Community Protection and Cohesion (reassuring the community and building stronger communities);
 - Environment (maintaining a clean, quality environment).

10. OPPORTUNITIES AND RISKS

- 10.1 The opportunities and risks associated with this proposal have been identified and assessed. Arrangements will be put in place to manage the risks and maximise the opportunities that have been identified.

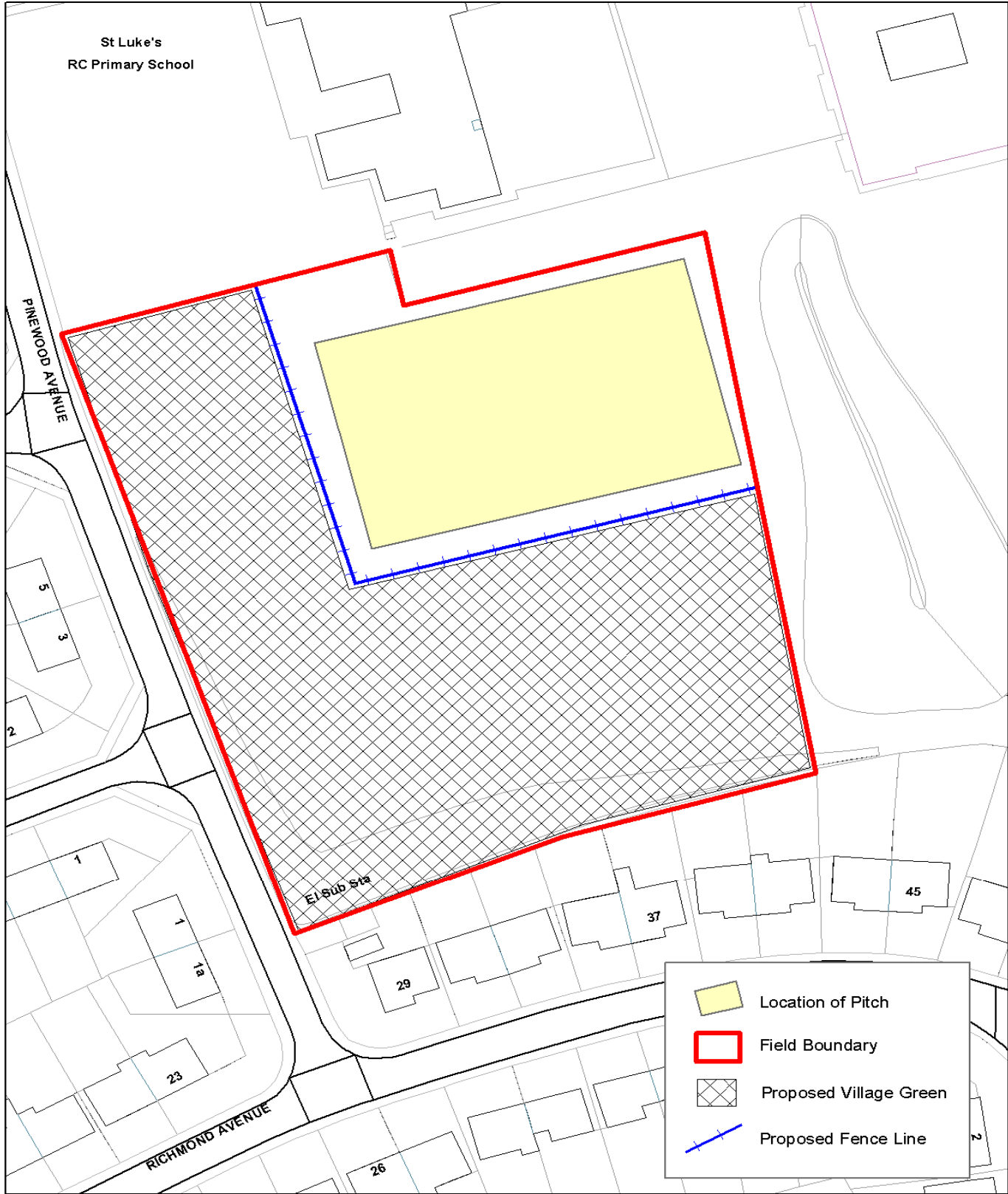
11 FINANCIAL IMPLICATIONS





- 11.1 The funding for the fencing would be prioritised through the Local Authority Co-ordinated Voluntary Aided Programme (LCVAP). The land is currently maintained by the Local Authority through delegated school budgets, and this would continue.


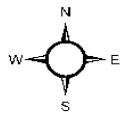
12 WARD IMPLICATIONS

- 12.1 The site is located within the Wrockwardine Wood and Trench Ward.
Ward Members Councillors Robert Groom and Charles Smith

Report prepared by: Mal Yale, Capital & Facilities Manager Tel: (01952) 380931



	Location of Pitch
	Field Boundary
	Proposed Village Green
	Proposed Fence Line

 <p>Telford & Wrekin COUNCIL</p>	<p>Children & Young People Civic Offices PO Box 440 Telford TF3 4WF</p>	<p>Proposed Fence Location (approx)</p>	Scale: Not to Scale	
			2010	
<p><small>Reproduced from the Ordnance Survey mapping with the permission of the Controller of Her Majesty's Stationery Office © Crown copyright. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings Borough of Telford & Wrekin Licence No 100019694 Date: 2010</small></p>				

TELFORD & WREKIN COUNCIL

CABINET - 23 MARCH 2010

MAKE A DIFFERENCE SUGGESTION SCHEME

REPORT OF THE ASSISTANT CHIEF EXECUTIVE

1. PURPOSE

- 1.1. To put forward final proposals for the new Make a Difference suggestion scheme.

2. RECOMMENDATIONS

- 2.1. That Cabinet endorse the final proposals and agree that the scheme is launched on 1 April 2010;

3. THE SCHEME

3.1 Purpose and Objectives

3.1.1 On 10 November 2009 Cabinet endorsed the development of a new Employee and Member suggestion scheme. The implementation of this scheme is a 'One Council, One Team, One Vision' priority as it will create the opportunity for employees and Members to engage in the delivery and improvement of council services and operations.

3.1.2 The new scheme provides a formal route for employees and members to put forward their suggestions to help achieve efficiencies and improve services.

The main objectives are to:

- generate quality ideas and implement them
- support the 'One Council, One Team, One Vision Ethos'
- empower and recognise staff
- improve our services and achieve efficiency savings
- improve employee engagement

3.2 Key Principles

- Suggestions will be encouraged which achieve efficiencies, improve the way we deliver services, manage the organisation and improve working conditions
- All Council employees and Members can make a suggestion through the scheme
- Suggestion can be made online or manually
- Every suggestion will be recorded and tracked and this information will be available for all employees and Members
- Employees and Members can remain anonymous if they wish
- Due recognition and reward will be given for any suggestion put forward

- Every suggestion will be independently evaluated
- If employees/Members disagree with the outcome of an evaluation they can request a review
- Suggestions will be evaluated to see if it could be implemented in other services / at a Council-wide level
- If employees would like to be involved in implementing their suggestion this will be accommodated where possible – this must be agreed with their manager)
- The scheme will be reviewed after 12 months to ensure it is effective.

3.3 Process

3.3.1 Appendix 1 illustrates the process that will be followed when a suggestion is submitted through the scheme.

3.3.2 There are 4 main roles involved in the process:

- Suggestor – employee or Member who puts a suggestion forward
- Coordinator – officer who leads and manages the scheme day-to-day
- Evaluator – manager responsible for evaluating whether a suggestion can and should be implemented, identifying the pros, cons, costs and benefits
- Steering Group – oversee scheme delivery and performance (appendix 2 – Terms of Reference).

3.3.3 The Coordinator will sit within the Organisational Development and Change Management Service.

3.3.4 Evaluators will be selected in each service area to evaluate suggestions. Meetings are currently being held with each Service Area management team to establish who will be evaluators. Training sessions will be held with evaluators to ensure that they understand their role and how the process will work.

3.4 Accessibility and Eligibility

3.4.1 Accessibility - All Telford & Wrekin Council Members and employees that are directly employed by Telford & Wrekin Council are entitled to submit suggestions through the Make a Difference Scheme and where appropriate receive a reward.

3.4.2 Eligibility of suggestions – suggestions will be checked by the Coordinator to ensure they are eligible before they are sent on to be evaluated (Appendix 3).

3.5 Recognition and Reward

3.5.1 Everyone who submits a suggestion through the scheme will receive a thank you letter/e-mail and a Make a Difference gift (e.g. mug) to recognise their efforts and to raise awareness of the scheme to others.

3.5.2 Good news stories and successes will be promoted in a variety of ways.

3.5.3 Employees will be eligible for a reward if a decision is made to implement their suggestion. However, rewards will not be available to Members.

- 3.5.4 Employees will choose one reward from a selection of options: £25 cash, £25 'Love to Shop' Vouchers, £25 gift certificate to The Place, 1 month Aspirations Gym membership, 1 Adult Passport Ticket to Ironbridge Gorge Museums.
- 3.5.5 For team suggestions, £25 vouchers will be given per employee up to 4 employees for a team event i.e. vouchers for restaurant, bowling, theatre, etc (maximum reward £100 for teams with 4 or more employees).
- 3.5.6 Annual awards will be developed (e.g. Delivering major cashable efficiency savings and non-cashable efficiency savings). The value of these rewards need to be determined.

3.6 Future Management and Resources

- 3.6.1 The scheme will be managed within the Organisational Development & Change Management service.
- 3.6.2 The estimated budget for the scheme is £3000 (administration, rewards, publicity). Budgets are being realigned to resource the scheme.
- 3.6.3 The Coordinator will provide regular performance reports to the Steering Group and where appropriate the Corporate Management Team to ensure the scheme is effective and delivering required outcomes (Appendix 4).

4.0 OTHER IMPLICATIONS

4.1 Equal Opportunities

The scheme is available to all Council employees and members.

4.2 Environmental Impact

Some suggestions may have a positive impact on environmental issues.

4.3 Links with Corporate Priorities and Risk

The scheme helps to deliver the Efficient Community Focused Council. All suggestions will be reviewed to ensure that it helps to delivery the corporate priorities.

4.4 Financial comment

The ongoing cost of the scheme is estimated to be around £3,000 per annum which will be accommodated within existing budgets; any costs arising in 2009/10 will be met from current year underspends.

The granting of incentive awards is a taxable item. However, discussions with HM. Revenues & Customs (HMRC) indicate that in relation to Suggestion Scheme Encouragement Rewards, where the value is £25 or less then there is no tax liability. There are certain conditions attached to this: (a) the scheme must be open to all employees; (b) the suggestions must relate to the business; (c) the suggestions must not be part of a person's normal job; (d) suggestions can't come from a meeting whose purpose is to get suggestions. Once the scheme is fully developed it will need to be sent to our local HMRC Compliance officer to gain formal approval. In the event that HMRC do not give approval there would be additional costs of tax and national insurance that would fall on the Council. Where the value of the

reward is greater than £25, for example the team awards, this will be given in vouchers and a paye settlement agreement will be required so that it does not form part of an individual's taxable income. Also, in this instance, the employer is subject to tax and details would have to be included in annual payroll returns.

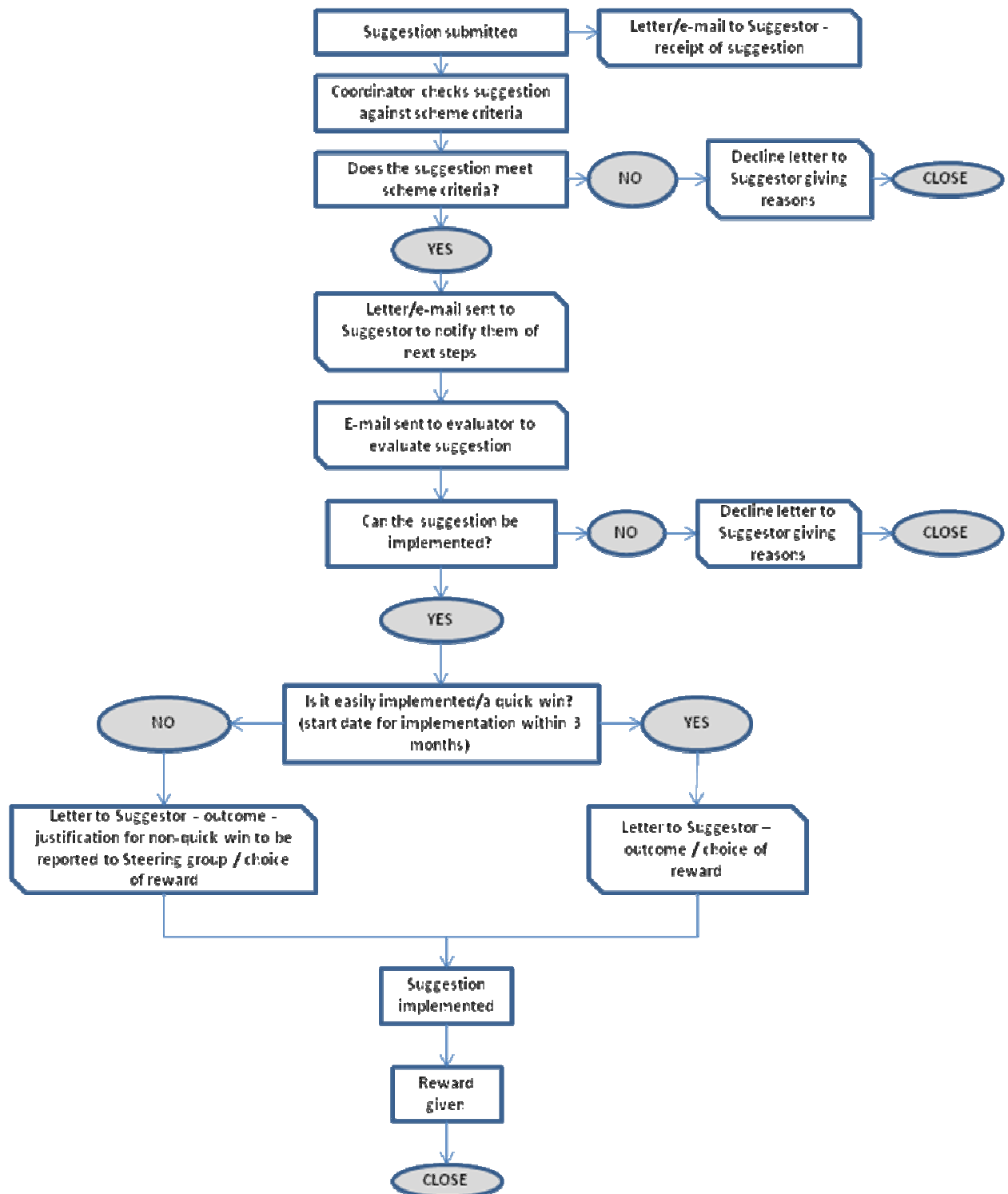
4.5 Legal comments

Key points to consider from a legal perspective are as follows:

- The scheme should be made available to all council employees who should all be given an equal opportunity to take part
- The process for considering suggestions should be consistent and transparent ensuring fair consideration is given to all suggestions (the process should be clearly set out).
- Before commencing the scheme the 'incentive award', tax issue (referred to in the financial comment above) needs to be clarified and resolved. Formal confirmation of the view from HMRC should be obtained in the event of any future queries.

Report Prepared by Debbie Byle, Project Lead, 380137

Appendix 1 – The Process



Appendix 2 – Make a Difference Steering Group Terms of Reference

Roles and Responsibilities

The overarching role of the Steering Group is to oversee the delivery of the Make A Difference scheme at the Council.

Responsibilities include to:

- monitor the delivery of suggestions and the benefits that are being achieved e.g. cost savings and efficiencies and service improvements
- review suggestions that will have a council-wide impact and approving future action
- manage any challenge that come through the scheme
- undertake a scheduled review of a sample of suggestions which have been declined following evaluation

Frequency of meetings

The group will meet on a monthly basis. This will be reviewed in 6 months (October 2010).

Members

1. Organisation Development & Change Management Manager / Gail Rider –Business Efficiency Team - to share role
2. Employee Focus Group Chair / Vice Chair
3. Senior HR Officer
4. Corporate Finance Manager
5. Union representative (to be coordinated by union reps)
6. Scrutiny Leadership Board Member/Value for Money Scrutiny Member

Chairman to be identified at next meeting – end March 2010.

Co-ordinator to be identified (scheme to be overseen by Debbie Byle, Project Lead at this stage (March 2010)

Appendix 3 – Eligibility of Suggestions

Suggestions will not be progressed through the Make a Difference scheme if:

- a. *You could reasonably have been expected to come up with your suggestion as part of your normal duties*

The test here is, could you implement the suggestion without approval from your line manager? If yes, your suggestion cannot be progressed through the scheme. However, your suggestion is still valuable and you are encouraged to implement it.

- b. *Your suggestion tackles a health and safety issue*

Your suggestion concerns a health and safety matter and all employees have a legal duty to report all shortcomings in health and safety provision.

- c. *Your suggestion relates to your terms and conditions of employment*

If your suggestion relates to the terms and conditions of your employment, please speak to your manager or contact Human Resources.

- d. *Your suggestion is a duplicate*

Your suggestion is the same or similar to one that has already been received and reviewed through the Make a Difference Scheme.

- e. *Your suggestion refers to a problem without giving a solution*

Any suggestion put forward should propose a solution to an issue, problem or opportunity.

- f. *Your suggestion is a complaint rather than an idea*

The Make a Difference scheme is not intended as a vehicle for complaints.

- g. *Your suggestion has been made at a meeting held for the purpose of suggestions*

Appendix 4 – Performance Reporting

A performance report will be presented to the Steering Group on a monthly basis.

1. Key Indicators

There are 3 key indicators which measure the effectiveness of the scheme:

- **Implementation rate**

Calculation: (no. of suggestions submitted (exc. duplicates) / no. of suggestions implemented

The 2008 survey carried out by Ideas UK indicated that the implementation rate for public and sector suggestion schemes 12% (12 suggestions implemented in every 100).

Target for 2010/2011: 10% implementation rate.

- **Savings achieved**

Estimated financial savings will be identified for all suggestions as part of the evaluation process.

In some circumstances, suggestions that are implemented will not achieve financial benefits. However, for suggestions where estimated financial benefits have been identified, these will be monitored to establish the actual savings realised.

The savings made could be reinvested in another part of the service to support improvement. However, in the current financial climate cashable savings may need to contribute to the overall savings target.

Target for 2010/11: Baseline to be established and target set for 2011/12

- **Non-financial benefits achieved**

Estimated non-financial benefits will be identified for all suggestions as part of the evaluation process.

Once suggestions are implemented, actual non-financial benefits will be monitored. Outcome measures for these will be specific to each suggestion.

Other information will be reported to the Make a Difference Steering Group to inform them about the following:

2. Additional information

Additional information will be provided to inform the Steering Group about the delivery of the scheme on a monthly basis.

This information will also be broken down by Service Area:

No. of suggestions submitted	No. of suggestions awaiting implementation
No. of suggestions declined	No. of suggestions implemented
No. of suggestions under evaluation	

For suggestions which are implemented, the following information will be reported:

Suggestion	Non-financial benefits
Implementation information	Actual financial savings achieved
Date of implementation	Action non-financial benefits received
Approximate financial savings	