



CITY OF  
**YORK**  
COUNCIL

## **TAS Assessment of the York Quality Bus Partnership**

City of York Council  
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**The TAS Partnership Limited**  
Passenger Transport Specialists

# Quality Assurance

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# Executive Summary

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## 1. Introduction

- 1.1 The TAS Partnership Limited (TAS) has been commissioned by City of York Council (CYC) to support the development of the Quality Bus Partnership (QBP) scheme in York. The commission is supported by the current York QBP (YQBP) membership.
- 1.2 The objectives of this review have been broadly agreed as follows:
- To review the terms of reference of the current York QBP against 'good practice' from similar partnership schemes in the UK;
  - Assess whether the current QBP membership supports its structure and responsibilities, or would prefer a change of focus or format;
  - Capture and summarise the individual concerns, if any, of members and other stakeholders involved in the York QBP;
  - Ascertain the level of aspiration amongst partnership members to increase bus patronage in York and to determine the extent to which QBP members believe that the partnership has collective responsibility for development and growth within the local bus market;
  - Identify perceived barriers to the effective delivery of partnership schemes and projects; and
  - Take into account current consensus regarding the role of partnerships given the range of alternative options (i.e. voluntary and formal approaches).

## 2. Our Approach

- 2.1 The review consisted four primary tasks:
- **1:** Considers 'Good Practice' within bus partnerships and an assessment of the current York scheme against the good practice criteria;
  - **2:** York QBP member consultation, including senior managers from UK bus operators
  - **3:** Comparison of the York scheme with other UK QBPs in areas with similar bus operating characteristics
  - **4:** Reviewing the options available to the York partnership and making recommendations aimed at developing partnership effectiveness and bus patronage growth in York.

- 2.2 Throughout the progress of each task, stakeholders from both the council, partnership members and from the bus industry were actively and positively engaged in the review process. We would like to take this opportunity to express our sincere thanks to all contributors to this review.

### **Summary of Findings**

- 2.3 We have summarised below the main findings from the outcomes of each task, covered in more detail within the remaining sections of this report.

## **3. QBP Good Practice and Assessment of York Scheme**

- 3.1 The current York partnership originates from 2001 with a subsequent relaunch in 2007. The objectives of the partnership are captured in the terms of reference documentation:

*"...to encourage greater use of public transport in and around York to reduce problems caused by traffic congestion, to improve the environment and to meet the social need for transport".*

- 3.2 We have made an objective assessment of all aspects of the current York QBP scheme against three broad criteria identified by TAS in previous 'good practice' assessments of quality bus partnerships, provided alongside this report as a companion report.

- 3.3 The three broad criteria against which the YQBP was evaluated include:

- Planning and initiation
- Implementation and delivery
- Monitoring and development

### **Initial Findings**

- 3.4 Our initial findings suggest that:

- The Terms of Reference (ToR) and Heads of Terms (HoT) documents provide a reasonable outline of the partnership, its purpose and its stated objectives, but there is a mix of different objectives and overlap between the two documents. There is a therefore a need to update both documents;
- Supplementary documents include minutes of partnership meetings and the Annual Action Plan, but the last copy of the Annual Plan appears to originate from 2008/09;
- The partnership consists of a series of separately signed agreements between individual operators and CYC.
- The partnership is well-represented from both the local authority and bus and coach operators, although membership could be extended to other

parties with transport interests (including NHS, community transport, rail and taxi / private hire vehicle representatives for example);

- The outputs from the partnership are less well supported and defined. Whilst the partnership refers to the need for quantitative analysis, there is no supporting evidence for:
  - Performance and goal-setting, for example the use of Key Performance Indicators to identify promising projects and monitor progress;
  - Revenue and/or capital expenditure for projects or the partnership (other than reference to members' budget resources and complementary projects e.g. the Local Sustainable Transport Fund); and
  - Risk assessment or other partnership management tools, for example cost-benefit analysis of partnership projects.

3.5 We note that the current focus for the partnership is to address reliability concerns and those of traffic congestion, although the partnership appears to have had a more historic objective to increase patronage, which has latterly become a secondary focus. There is also no direct evidence from any of the partnership forums or sub-groups that environmental and social needs are being actively addressed and as such we recommend these should be pursued in the next phase of partnership development.

## **4. Partnership Members Survey**

4.1 This involved an informal survey of YQBP members regarding five common elements regarding the current York QBP:

- Performance;
- Organisation;
- Importance;
- Future; and
- Patronage Growth

4.2 A SWOT Analysis of the current and potential options for the partnership was distilled from members' feedback. The York QBP has a number of inherent strengths including membership base and willingness to develop the 'bus product' for York. However, the current partnership appeared to lack a strategic focus and could be undermined by communications breakdowns between members, especially if these led to a misrepresentation of members' interests.

## Findings

- 4.3 Whilst York is not universally viewed as a growing market, most operators see inherent value in the potential of York and accordingly aspire to growth within that market. Analysis of existing problems is an essential first step to determining what can produce growth.
- 4.4 A number of reasons for the stagnation of patronage growth in the City were put forward, among them the acceptance by First Group that moving senior management away from York could have contributed to decline. A number of suggestions was made to achieve passenger growth and modal shift and it was a commonly held view that YQBP should lead the way in achieving growth. It is important that a strong and good image is created for public transport in the City to improve public perception of bus travel.
- 4.5 Our findings suggest that YQBP serves a useful function in bringing together operators, Council officers and bus users to develop ideas to improve the quality of bus services but it lacks focus. There is a clear willingness of all members of YQBP to work together to deliver success in raising the profile and quality of public transport with consequent increase in passenger numbers. It is anticipated that the QBP will lead on a number of joint operator activities currently not pursued such as publicity and marketing.
- 4.6 The City of York's success in securing additional funding is a wonderful opportunity for YQBP to raise the profile of bus operation and increase patronage. To do so there needs to be a restructuring of the organisation of the QBP with clear objectives (agreed at the main meeting), and detail being determined away from the main meeting. In order to ensure that the funds are used to maximum effect, a reporting procedure should be adopted (outlined in the recommendations) with clearly defined targets for each policy item.
- 4.7 Members perceive clear value in Councillors and bus user representatives attending YQBP meetings and it is proposed that they continue to do so. A smaller Executive may be seen to be more effective at making strategic decisions.

## 5. UK Case Studies

- 5.1 This involved undertaking a succinct survey highlighting the characteristics, membership and reported (or notable) outcomes from six other bus partnerships, in areas which shared a similar bus operating environment to that of York.
- 5.2 Our initial findings from the case studies were as follows:
- Most of the Quality Bus Partnership schemes have been in place for over five years;
  - The schemes all involve partnerships between the local authorities in the area in which the scheme operates (including Shire and District councils where appropriate) and the principal UK bus operating groups, notably



Arriva, First, Go-Ahead and Stagecoach. In most cases there is a very dominant local operator;

- Most partnerships consist of local authority and bus operator representatives as core constituents. Other than perhaps the Slough scheme, only York has a cross-sectional membership including community and user group representatives. For York this has the advantage that the partnership is engaged widely with the community, although it does make it difficult to reach consensus based decisions because of the number of stakeholders and differences between the outcomes they seek from participation in the partnership;
- All schemes involve formal, signed agreements with Council and operator partners;
- Where schemes have ended or are due for imminent expiry, there are discussions in place amongst partners to extend the schemes;
- Most of the schemes focus on the following stated objectives:
  - Increased bus use and bus patronage over the period of the scheme;
  - The principle of achieving modal shift from car to bus (specifically in high-profile areas such as Brighton, Cambridge and Oxford); and
  - Increased social inclusion and accessibility to high quality bus services – this has tended to involve investment in low floor, low emission vehicles (more recently funded through the DfT Green Bus Fund) and investment in at-stop infrastructure (reference to Kickstart, now Better Bus Area funding, to provide some capital support for such schemes).

## **6. Refining the Partnership**

6.1 This brought together the initial findings to identify the characteristics of a 'good' bus partnership:

- Defined, strategic objectives leading to interventions whose outputs and outcomes can be measured against local or national government objectives (e.g. economic growth and carbon reduction), or bus operators' commercial objectives (e.g. patronage and revenue growth);
- A forum that brings together those who can first recognise and secondly influence a particular operational or commercial concern relating to bus services on a given route or in a specific area;
- A shared willingness to create more efficient and better quality bus services in a given area, with mutual trust and appreciation of each members' position entering into the partnership and a joint vision for improvement over the medium to long term;

- A single signed agreement by all members with a commitment to improving bus services – the agreement should be publicly available and communicated to all members’ employees and stakeholders;
- Constituent members include the senior management teams from both the local transport authority and bus operators who are able to make quick and effective decision; and
- “Task and Action” groups, focusing on specific projects and schemes, take place on an informal basis and report back to the Executive Group. Task and action groups should capture user and other representatives’ interests in bus services, depending on the scheme or initiative which they are formulated to address.

6.2 We also considered what changes would be required within YQBP to take the partnership forward. We also considered the role of Qualifying Agreements (QA) as a potential delivery mechanism to achieving stated objectives and recognising the potential of the recent funding award from the DfT to kick start the efforts of the partnership.

## **7. Recommendations**

7.1 We believe that the foundations for a successful bus partnership in York are present and that the emphasis of the partnership needs to move from aspiration to delivery.

### **Constitution and Administration**

7.2 Based upon our initial findings and recommendations from Sections 1 to 3 inclusive and our appraisal contained in Section 4, we recommend that:

- The current partnership is refined but remains a voluntary scheme;
- An independently chaired Executive Group is constituted that forms the core of the future revitalised bus partnership in York – this should consist of only senior local authority officers and senior bus operator representatives who can make strategic decisions and ultimately influence the strategic objectives of the partnership;
- Establish stakeholder action and interest groups to implement the QBP Action Plan approved by the Executive Group. All Groups (including the Executive and a Development Strategy Group) should deal with items within their allocated remits such as specific traffic congestion points and aspects of marketing and information etc. They would meet as required and report to the Executive Group or QBP meetings as appropriate.
- There should be a distinct Operators Group (similar to BOSSY and ABOWY in South and West Yorkshire respectively) – if the operators agree. The Confederation of Passenger Transport could be asked to facilitate this.

- The full QBP should continue to meet four times per year to continue to engage the interest and input of those not involved in the Operations Groups, Executive Group or other Groups. The frequency of meetings should be reviewed to ensure the meetings maintain their relevance. The Operators Group would meet four times per year ahead of the YQBP meeting and report back to YQBP on progress on issues of concern to operators and new proposals.
- Quantified reports should be presented to each QBP meeting on patronage levels, service punctuality and reliability using KPIs agreed by the partners.
- Papers should be prepared in advance of QBP meetings, outlining proposals for new actions which would then be added to the QBP's strategic plan.
- Agendas and papers for meetings of the QBP, Executive Group and other Groups should where possible, except in cases of real urgency, be circulated at least two weeks prior to meetings;
- Minutes of meetings must be produced within two weeks of the meeting date to enhance effectiveness and to ensure they are available well before the subsequent meetings of the relative Groups.
- The partners should encourage some representation of rail, health, community transport and taxi interests. This might then be a Quality **Public Transport** Partnership, rather than a strictly Quality Bus Partnership.

### 7.3 The first Executive Group meeting should:

- Review and revise the Terms of Reference and Heads of Terms of the YQBP to update the documents and ensure that there is a common set of objectives in both documents. This should include a review of the stated objectives of the partnership, including an open and honest assessment of the current stated objectives against each member's position, plans and aspirations for York – this may include identifying the steps and barriers to success and a clear commitment from Executive members to achieving the stated objectives;
- Emphasise a focus on 'delivery' rather than simply providing a discussion and advisory forum;
- Ascertain and agree roles and responsibilities of partnership members (including administration, reporting and other duties)
- Establish a framework or process for scheme development including identification of revenue, staff, capital requirements and sources together with cost-benefit or other appropriate analysis to justify investments and priorities;

- Agree to publicise the activities and objectives of the partnership through a jointly-supported website for bus users;

## **Areas for Action**

7.4 We recommend various initial actions for YQBP or its sub-groups:

### **a) Agree Targets for Improving Buses in York**

- ◆ Reflecting key aims set by CYC and operators in line with the Bus Improvement Study's recommendations. This could include reliability/punctuality targets and targets relating to patronage growth and (where required) improvements to passenger satisfaction with services.

### **b) Multi Operator Tickets**

- ◆ To examine the range, periods of validity, pricing, 'main types' and boundaries of such tickets. Possible investigation of common levels of discount for young people – perhaps target 16-24 age band. Expansion of Yorcard and agreement on 'back office' procedures'.

### **c) Service Changes and Publicity**

- ◆ Agree a set of fixed dates for service changes
- ◆ Agree common format for timetables; agreement to include tendered journeys in main operator timetables (perhaps in exchange for CYC specifying acceptance of main operator's tickets)

### **d) Bus Stations and Bus Stops**

- ◆ Agree a code of conduct for stand allocation and use at strategic locations with services grouped by corridor or destination, not operator.

### **e) Infrastructure Improvements**

- ◆ Agree priorities for sites, locations or corridors where investment should be focussed, followed by a rolling programme.
- ◆ Possible agreements to better coordinate services and share frequencies where operations overlap.

### **f) Marketing**

- ◆ Agree key aspects for marketing – different targets – Residents, tourists, Park & Ride. Agree timing and roll-out with operators, plus how they can contribute to initiatives.

**g) Customer Satisfaction**

- ◆ Reactive and proactive measures reflecting the concerns of passengers identified through a programme of annual surveys. Possible link with Passenger Focus work.



