

INFRASTRUCTURE OVERVIEW AND SCRUTINY COMMITTEE

Committee Report

Public

Date of Meeting:

13 December 2001

Title: CONCESSIONARY FARES BEST VALUE REVIEW

Report of: The City Treasurer

Report reference: Financial Memo 2001/02 No 122

Summary:

Members are advised on progress made on the Best Value review of Concessionary Fares since 01 November 2001.

Recommendations:

1. Members are requested to scrutinise progress to date on the Best Value review of Concessionary Fares.
2. Members are requested to agree the amendments to the scope of the review detailed in paragraph 4 of the report.

Contact Officer: Peter Mason

Ext: 7270

CITY OF CARLISLE

To: The Chairman and Members of the Financial Memo

Infrastructure Overview & Scrutiny Committee 2001/02 No 122

13 December 2001

CONCESSIONARY FARES BEST VALUE REVIEW

1. INTRODUCTION

1. Members at the meeting of 01 November 2001 considered the initial draft of the Best Value review of concessionary fares.

2. Members in scrutinising the review made several suggestions on how the scope of the review could be more challenging, particularly in respect of rural issues affecting concessionary passholders and more importantly potential passholders.
3. Members asked for a further report on the progress of the review before the final draft was presented for member scrutiny in February 2002. This report updates members on progress made since 01 November 2001.

2. CHALLENGES SET AND OBSERVATIONS MADE AT THE INFRASTRUCTURE OVERVIEW AND SCRUTINY COMMITTEE OF 01 NOVEMBER 2001

2.1 Members stressed the importance of having the necessary elements in place, in particular, an Action Plan, Performance Indicators and up-to-date survey information.

Progress

A base Action Plan had already been developed and Performance Indicators set. These are being adjusted according to the outcome of various stages of the review.

Whilst detailed survey information is already available, collected over the last 3 years, a further survey of 200 rural residents is currently underway. (see Appendix 1 attached)

2.2 Members expressed concern at the low pass take-up by disabled people which required to be looked at further.

Progress

The current survey has been designed to canvass opinions of all current or potential Passholders and may give some indication as to why take-up is low amongst people with disabilities.

In an effort to target disabled people individually over 500 letters containing information about the Scheme have been sent to benefit applicants who are Disability Living Allowance recipients where they do not currently have a concessionary Bus Pass.

2.3 Members suggested that the Executive should be asked to consider whether applying for Chartermark status was appropriate for the Scheme once identified improvements had been implemented.

Progress

Attendance at a Chartermark seminar in York has led to the conclusion that it would be more appropriate for the Revenues Division or the Council as a whole to apply for Chartermark status when appropriate (including Concessionary Fares Scheme). In the circumstances the Chartermark accreditation will not be pursued for Concessionary Fares administration in isolation.

2.3 The Head of Corporate Policy in supporting the Scrutiny process suggested that a number of initiatives under the Rural White Paper should be looked at.

Progress

Work in this area is ongoing. The Rural White Paper's suggestions in relation to

flexible local transport are aimed more at actual provision of transport than concessions and charging, although the Paper suggests that voucher schemes may be particularly appropriate in remote rural areas where scheduled bus services are more limited. The City's Concessionary Fares Scheme will need to adapt to changes arising from the Paper and in supporting more responsive services there will be resource implications. Participation in the County-wide Concessionary Fares Group and working closely with transport personnel within the County Council help to develop Best Value partnership on rural issues, including identifying likely costs and go towards promoting an integrated approach to concessionary fares and rural transport. What will be included in the review is a commitment for any new scheduled bus services introduced under a rural, flexible local transport initiatives to be included in the Concessionary Fares Scheme.

2.5 Members requested further investigations of the advantages of a voucher or token scheme, it was suggested that Officers contact other Authorities who operate such a scheme and report further.

Progress

Informal contact with a number of Authorities who operate token/voucher based concessionary fares schemes indicates that they are considering phasing them out in favour of bus passes.

Survey respondents are being asked whether they would prefer travel tokens/vouchers as one of the alternatives to Passes. Early indications suggest that this would not engender widespread popularity, partly due to the perceived high cost of taxis and bus fares for residents of rural areas travelling to Carlisle i.e. many potential recipients of vouchers/tokens would rather use their own transport.

2.6 Members commented on the injustice created by the different schemes adopted in Dumfries and Galloway when compared with Carlisle and the City Treasurer undertook to raise the issue with Central Government.

Progress

A letter has been sent to the Secretary of State for Transport by the Portfolio Holder Infrastructure, Environment and Transport but no reply has been received to date (see appendix 2).

2.7 Members resolved that further investigations and consultations, including those suggested above, be undertaken with qualifying Carlisle residents on possible improvements that could be made to the Concessionary Fares Scheme and reported back to Members before the final draft of the Best Value review is prepared.

Progress

Survey in progress. Initial results will be circulated at the meeting.

2.8 Potential improvements to the Concessionary Fares Scheme to be investigated

and reported back.

Progress

Ongoing - will be provided with the survey findings.

3. CHALLENGES SET BY THE BEST VALUE WORKING GROUP

3.1 The Best Value Working Group set the following challenges to the review process.

(i) Further explanation of the scheme benefits over the national minimum.

(ii) Expand on linkages, in particular how the Concessionary Fares Scheme links into Council policy.

(iii) Expand on Challenge.

Progress

The above areas have been incorporated into the Best Value review report.

(iv) Produce a set of costed options for improving the Scheme.

v. Consult councillors on the likelihood of money saved being used to fund enhancements.

Progress

‘Educated guess’ costings presented to Members and a list of options agreed for consultation with Passholders/potential passholders.

(vi) Consumer consultation survey.

Currently in progress.

(vii) Include specific quantifiable targets in Action Plan.

Ongoing.

1. SCOPE OF REVIEW

1. The additional challenges set by members and the Best Value Working Group has required minor enhancements to be made to the scope of the review in the areas of:

- i. Timetable, e.g. additional reports on progress to Infrastructure Overview and Scrutiny Committee;
- ii. Co-opting of ‘expert’ review team members to resource the additional challenges and their roles on the team;
- iii. Review challengers including Infrastructure Overview and Scrutiny role.

Note – a qualifying resident group to vet and challenge the emerging findings of the review has yet to be identified.

1. Attached at Appendix 3 is the revised ‘scope’ amendments to the original scope agreed by members. Amendments are highlighted in italic print.

1. RECOMMENDATION

1. Members are requested to scrutinise progress to date on the Best Value review of Concessionary Fares.

2. Members are requested to agree the amendments to the scope of the review detailed in 4. above.

D THOMAS

City Treasurer

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Contact Officer: Peter Mason Ext: 7270

City Treasury

Carlisle

06 December 2001

PBM/CH/f1220102

Appendix 3

Scope and Boundaries of Concessionary Fares Best Value Review

The review will examine all elements of the Carlisle City Council Concessionary Fares Scheme.

Preliminary Issues for the Review

- Identify and appoint appropriate person(s) for carrying out the review.
- Develop an effective Action Plan for the review.
- Produce an effective framework for consultation

Key Issues for Review

Main issues will be

- Ensure that Members aspirations are met.
- Identification of aspirations of Passholders and potential Passholders and ensure that these are appropriately met.
- Efficient distribution of Passes to eligible residents of the District.
- Satisfaction of applicants in the process of acquiring and using the Pass.
- Cost effective administration and operation of the scheme
- Participation of qualifying bus operators in the District and accurate payments to these operators based on actual ridership.
- Accurate and timely production of management information
- Contribution of the scheme to the broader aims of the Council e.g. Transport Plan.
- Contribution of the Scheme beyond the City Council e.g. Countywide Scheme.
- Operation of the Scheme in accordance with statutory requirements e.g. Transport Act 2000
- Publicity and promotion of the Scheme.
- Identify and implement examples of Best Practice where these can be shown to improve the take up and operation of the Concessionary Fares Scheme.
- Consider the future of Concessionary Fares, particularly in relation to legislative change; introduction

of new technology; and urban/rural issues.

Reporting Mechanisms and Proposed Report Submission Dates

1. Review plan

Submit to Best Value Officer in July 2001

2) Research and Analysis Stage and draft Action Plan

Draft report to Best Value Working Group and Executive by end September 2001.

3. Action Plan and First Draft Review Report

Report to Best Value Working Group, Executive, portfolio holder (i.e. environment portfolio) and Infrastructure Overview and Scrutiny Committee in November 2001.

4. *Progress Report*

Best Value Working Group and Infrastructure Overview and Scrutiny Committee in December 2001.

5. *Final Draft Report*

Best Value Working Group February 2002

6. *Final report*

March 2002

Stakeholder Consultation

Various consultation exercises have been carried out with Pass holders and potential pass holders (see Review Timetable – annex 1).

Discussions have taken place with the following Bus Operators who provide services in the District with regard to Scheme participation and remuneration levels. These include:

Arriva Northumbria

Caldew Coaches

Fellrunner

First Edinburgh

Highfield Coaches

NK Brown

Oor Coaches

Reays Coaches

Royal Mail (Postbus)

Stagecoach Cumberland

Telford's Coaches

White Star Motors

Wright Brothers

A number of special interest groups were consulted as appropriate. These included Parish councils and groups supporting pensioner aspirations and those working with or providing support to people with disabilities.

As part of the Benchmarking exercise it is envisaged that other members of the Historic Cities Benchmarking Group will be surveyed regarding their Concessionary Fares Schemes.

Research and Consultancy

Internal policy documents, financial information, records of passes issued, performance targets and Committee reports will be used as a basis for internal research.

Externally it is envisaged that information will be obtained through surveys; identification and review of Benchmarking and Best Value reports from other Authorities; information from LGA surveys; Parliamentary legislation and guidelines and other relevant sources identified during the review process.

Resources

The City Treasury has employed a temporary part-time Project Officer with responsibility for co-ordinating the Concessionary Fares Scheme. She has a background in project management monitoring and evaluation and will carry out the bulk of the Review under the direction of and reporting to the Head of Revenues. Therefore, there should not be any negative impact on the day-to-day service delivery.

Review Team Members

Project Leader: Peter Mason, Head of Revenues

Review Adviser: Karen Hook, Best Value Officer

Review Co-ordinator: Carolyn Mitchell, Concessionary Fares Scheme Project Officer

Survey Assistant: Eddie Cain, Temporary Interviewer

Review Challenges

Best value Working Group

Infrastructure Overview and Scrutiny Committee

Qualifying Resident Group consisting of Passholders and Non-passholders

Other Participants

The Council's Information Officer, Lynne Wild, has been consulted on the 2000 and 2001 surveys and was responsible for developing, co-ordinating, analysing and reporting on earlier surveys. Interviews were carried out by a number of canvassing staff .

The Benefits Section within the Revenues Division will be used in identifying and contacting potential bus pass applicants who have disabilities.

The assistance of other departments will be requested as required where they may have expertise or in specific areas e.g. publicity.

Team Roles

Peter Mason Manage the review

Ensure that the objectives of the review are met within the agreed timescales.

Advise Chief Officers, Executive and Scrutiny Committee of progress, emerging findings, best value report including recommendations and action plan.

Carolyn Mitchell Co-ordinate the review

Collate and analyse information and produce draft reports

Design and conduct or co-ordinate surveys as appropriate

Karen Hook Provide advice, guidance and support during the Review.

Eddie Cain Interview survey respondents.

Appendix 2

The Rt Hon Stephen Byers MP

Secretary of State for Transport, Local Government and the Regions

The Rt Hon John Spellar MP, Minister of State, Minister for Transport

Responsible for: Transport.

7 December 2001

Dear Sir

As the Portfolio Holder for Infrastructure, Environment & Transport on the Carlisle City Council I wish to express concerns on behalf of the City Council about the disparity of travel concession schemes between England and Scotland.

Whilst the Council welcome the anticipated extension of the national concessionary fares scheme to men aged 60-64 under the Travel Concessions (Eligibility) Bill and the proposal to grant half-fare travel to pensioners for National Travel it appears that this is much less generous than concessionary travel proposals in Scotland and Wales

Carlisle district borders Dumfries and Galloway and, for a number of the latter district's residents Carlisle is the nearest 'shopping centre'. We therefore have a number of regular visitors to the city centre from across the Border. The proposal in the Scottish parliament for free travel for eligible residents from October 2002 and only half-fare travel for our residents has caused consternation amongst our Concessionary Fares Scheme Passholders who already feel that their Scottish counterparts, using the same bus services, are 'getting a better deal'.

I would appreciate it if you could advise me as to whether any measures are planned which would prevent this inequity i.e. granting free travel to English pensioners and people with disabilities.

Yours faithfully

Councillor Geoff Prest

Portfolio Holder

Infrastructure, Environment and Transport

Scope and Boundaries of Concessionary Fares Best Value Review

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- Operation of the Scheme in accordance with statutory requirements e.g. Transport Act 2000
- Publicity and promotion of the Scheme.
- Identify and implement examples of Best Practice where these can be shown to improve the take up and operation of the Concessionary Fares Scheme.

Relevant sections in Review	Appendices
4.3.4	K
4.3.1, 4.3.2	D, E, F, G, M
4.1.3	B, N, M
4.3.1	H, M
4.1.1, 4.1.4, 4.4, 5.3	C, N, M
4.1.4, 4.3.3	C, J, M
1, 4.1.2, 4.1.3	B, M
3	M
3	M
4.1.2, 4.1.3, 5.2.3	M
4.2, 5.1	C, M
5	C, M
4.1.1, 4.1.3, 5	C, M

- Consider the future of Concessionary Fares, particularly in relation to legislative change; introduction of new technology; and urban/rural issues.

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Portfolio Holder
Infrastructure, Environment and Transport

Carlisle City Council Concessionary Fares Scheme Rural Survey December 2001

Interim findings at 11th December 2001

The survey is undertaken by 2 experienced interviewers. Potential respondents are found by 'knocking on doors' in rural areas. Where more than 1 member of a household qualifies for a Bus Pass only 1 of them is interviewed.

The target for this survey is 200 respondents.

The total respondents to date is 136, 61% female and 39% male. The vast majority of those interviewed qualified for a Pass because of their age (94%) although a number of these also had a disability.

Survey area	Respondents to 11/12/01
CA4	17
CA5	27
CA6	48
CA8	44

51% of respondents did not have a Bus Pass at the time of the interviews. Of those, the main reason cited was having own transport (51%) whilst the next most popular response was a physical inability to use the bus (17%).

The bulk of respondents (60%) who gave an answer indicated that they had first heard of the concessionary fares scheme by word of mouth and 27% from local newspapers.

Only 3 respondents had found it difficult to get a Pass and this was due to mobility problems. 2 found the Passes difficult to use but this was because of the lack of buses rather than problems with the Passes themselves.

52% of Passholders used their Passes between 0.25 and 5 times a month and 48% used them 6 or more times a month.

72% of Passholders who replied said that they would use the buses about the same amount if they did not have a Pass.

Only 27% of those who answered the question indicated that they were aware that they could now use their Passes for journeys throughout Cumbria with Stagecoach. Only 22% knew that they could use their passes for journeys beyond the District boundaries with other bus operators.

Of those respondents who gave a reason for not using their Passes beyond the District boundaries the most common response was lack of knowledge (47%) followed by not going out of the District (29%). However, 56% said that they did intend to use the Pass beyond the District boundary in the future. The main reasons for these journeys were cited as day trips/leisure activities; shopping; and visiting friends and relatives.

The most common forms of transport (other than buses) used by survey respondents were own transport (47%) and taxis (19%).

59% of respondents said that they would not, or were unlikely to, use a national half-fare travel facility if it were available.

81% of those who stated a preference said that they would rather have a plastic Smartcard type bus pass which would not need to be renewed unless it was lost or became damaged than the current laminated Pass renewable every 3 years.

When given a choice of concessionary travel schemes those who replied indicated a majority preference for bus passes (76%). 18% opted for travel vouchers/tokens and 5% for Railcards.

The main improvements suggested for the scheme were better concessions and the bulk of the other comments related to the need to improve bus services.

In summary, emerging findings suggest

- (i) Qualifiers not getting bus passes mainly cited the reason being that they had their own transport.
- (ii) Concessionary fares Scheme needs better advertising, particularly in using bus passes for journeys outside the District.
- (iii) The overwhelming preference of rural qualifiers for concessionary travel was for half-fare concessionary passes (76%). Only 18% opting for tokens/vouchers.
- (iv) British Rail concessionary passes were not popular with only 5% choosing this option. However, this 5% could be accommodated at a cost of £18,000 p.a.