

# Customer Service and Operational Performance Panel



**Date:** 6 June 2018

**Item:** Assisted Transport Services

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## This paper will be considered in public

### 1 Summary

- 1.1 At its meeting on 17 November 2017, the Panel considered a paper outlining a vision for spontaneous and independent travel for Londoners with reduced mobility (the Assisted Transport Services Vision). The Panel agreed to continue to support TfL in delivering its Assisted Transport Services (ATS) vision through the support of an ATS champion, from amongst its members, who would: 'challenge, champion and support' the development of ATS proposals.
- 1.2 This paper updates the Panel on progress to date in embedding the ATS vision within TfL's broader strategic objectives and delivering the actions set out in the ATS Roadmap, most notably the launch of a pilot to trial new ways in which to improve flexibility and choice for ATS customers; an integrated contract for the supply of taxis and Private Hire Vehicles (PHVs) for ATS services; and the integration of the operation of the Capital Call scheme within TfL On Demand Transport alongside the Dial-a-Ride service.

### 2 Recommendation

- 2.1 **The Panel is asked to note the inclusion of the Assisted Transport Services Vision and Roadmap in the Mayor's Transport Strategy and the progress made since the last meeting in delivering the outcomes.**

### 3 Background

- 3.1 With the number of Londoners with reduced mobility set to rise and pressure on available budgets to deliver existing ATS provision it has been clear for some time that a review of ATS provision has been needed. TfL provides the vast majority of funding for non-statutory door-to-door schemes in London contributing £46m towards the overall costs of £48m for Dial-a-Ride, Taxicard and Capital Call.
- 3.2 The ownership and governance of the various services that make up London's ATS provision is complex. Appendix 1 outlines the different public authorities (TfL, London Councils, the 33 London Boroughs, 32 NHS Clinical Commissioning Groups) and 22 charitable Community Transport Operators involved, the number of which has meant that the pace of change in ATS provision has been gradual.

- 3.3 TfL's Roadmap for a spontaneous and independent ATS, endorsed at the November 2017 meeting of the Panel aims to create added momentum to the pace of change. The Roadmap will achieve this through a series of incremental actions that culminate in a world leading service provision for ATS customers that meets five design principles: safe and reliable journeys; convenience; flexibility and choice; integration and innovation.

## **4 Embedding the Assisted Transport Services Roadmap**

- 4.1 The ATS vision and the actions set out in its accompanying Roadmap have been included in the final version of the Mayor's Transport Strategy (MTS), published in March 2018. This has firmly embedded delivery of the Roadmap as part of TfL's strategic plans. Proposal 56 in the MTS states that:

“The Mayor, through TfL and the boroughs will design Assisted Transport Services around the principles of safe and reliable journeys, convenience, flexibility and choice, integration and innovation, delivering the Roadmap by 2021”.

- 4.2 The MTS establishes the ATS Roadmap as a deliverable within TfL's Accessibility Implementation Plan alongside improvements to bus, underground and taxi services, acknowledging ATS's place as an integral part of an integrated and accessible transport network for London.
- 4.3 TfL have established an integrated team to co-ordinate and monitor progress in delivering the Roadmap's action plan. A summary of the progress to date is included in Appendix 2.

## **5 Assisted Transport Pilot**

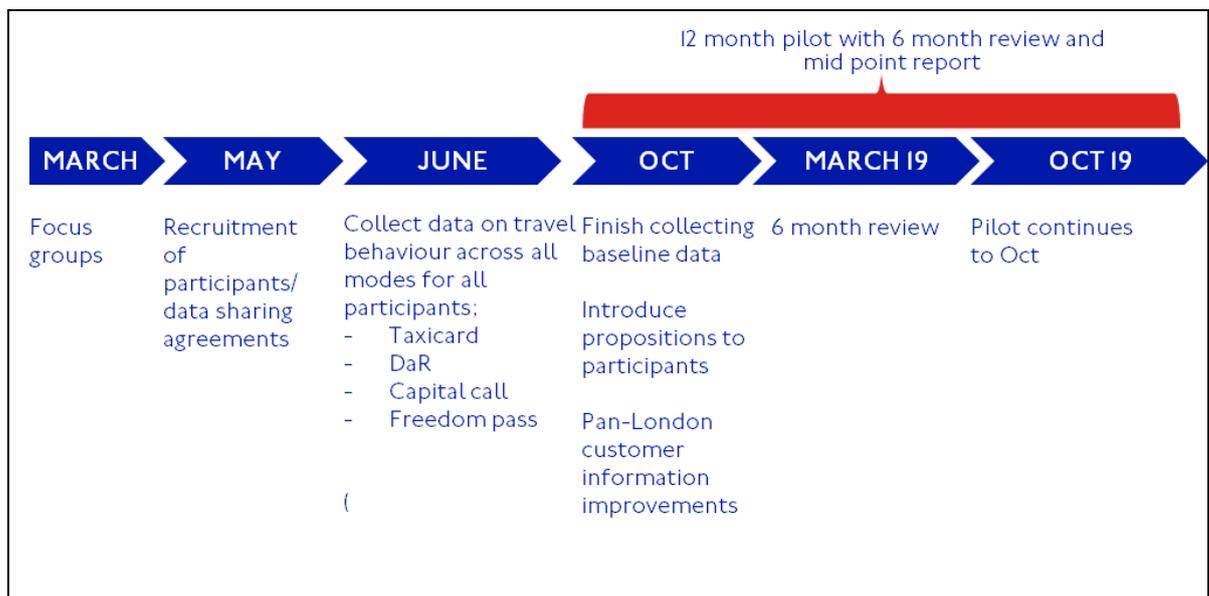
- 5.1 In July 2017, the Panel noted TfL's response to the London Assembly report: *Door-to-Door Transport in London – Delivering a user-led experience*, in particular its proposal to launch a pilot to trial new ways in which to improve flexibility and user choice for existing ATS schemes.
- 5.2 TfL's response to the London Assembly report outlined our intention, subject to agreement with London Councils and its Transport and Environment Committee (TEC), to run a pilot, looking at new ways in which users of ATS services could be provided with more flexibility and choice. The changes being trialled aim to improve access to the longer distance journeys that the London Assembly had highlighted as being a long standing issue. The original timeline, set prior to detailed discussion with the relevant parties, was to run the pilot for 12 months starting in April 2018, with plans for implementation finalised by the end of 2018.
- 5.3 Since then, TfL has been working with London Councils and two London boroughs, one in inner London (Southwark) and one in outer London (Hounslow) to progress arrangements to run an Assisted Transport pilot. A pilot steering group consisting of representatives from TfL, London Councils and the two boroughs involved has been driving progress.

- 5.4 TfL has also updated the London Councils' TEC in October 2017, December 2017 and April 2018 on the development of the pilot proposals to secure the agreement of TEC members at each stage of the pilot design.
- 5.5 Focus group research has been conducted on the changes being tested by the pilot, involving selected users and non-users of Taxicard, Dial-a-Ride and Capital Call. The research included hard to reach groups of potential ATS users such as younger disabled people and parents of disabled children as well as older disabled customers. The indicative findings of this research suggested support for the pilot proposals, but with different groups appearing to favour one or other of the propositions set out below.
- 5.6 The propositions to be tested involve modifications of the way that customers are given their annual Taxicard budget, currently set at 104 trips per annum in most boroughs. The propositions have been designed to combine the best aspects of the Taxicard and Capital Call schemes to create new ways to access door-to-door services that are more user friendly and flexible, particularly in respect of customers' ability to access longer distance journeys.
- 5.7 There are two versions of budget management being tested in the pilot. Both aim to retain those aspects of Taxicard favoured by customers and to make improvements to areas perceived to be barriers to use, based on the aspects of the Capital Call scheme (which offers a virtual cash budget) that enabled a high level of customer choice between short and long journeys, whilst still using a list of approved and vetted suppliers.
- 5.8 The level of customer contribution (currently a minimum of £2.50) will remain unchanged within both options being tested in the pilot and the subsidy amounts remain unchanged. However there will be two key differences from the current Taxicard offer:
- (a) under proposition A, the 'double swipe' maximum will be removed enabling longer journeys (participants can use more than two swipes for a journey) with conditions put in place to ensure that the participant has funds for a return journey; and
  - (b) under proposition B, the trip budget will be converted to a virtual cash budget equivalent to the standard trip based budget.

	<b>Proposition A: Trips</b>	<b>Proposition B: Financial equivalent of trips</b>
Hounslow	104 per annum	£1,110
Southwark	9 a month	£95 a month (£1,140 per annum)

- 5.9 The amount allocated to the virtual cash budget for each user is the financial equivalent of the current trip limit. This amount has been calculated using the existing trip profile (i.e. how many trips completed per tariff for both Taxi and PHV).

- 5.10 The pilot will involve circa 300 participants randomly selected from Taxicard users and non-users within the two participating boroughs. The recommended sample sizes have also been calculated to enable a reasonable 95 per cent level of confidence that the observed behaviours from the pilot, were it to be rolled out to the entire population (i.e. within each of the pilot boroughs), is within +/-10 per cent of this. Further details can be found in Appendix 3.
- 5.11 The necessary data sharing agreements between TfL and London Councils have become more complex as a result of the new General Data Protection Regulations, but are being finalised. Preparations for participant recruitment are underway and due to start at the end of May 2018. Data evaluation will cover the period April 2018 to October 2019. A summary of the timetable for the pilot is shown below:



## 6 Integrated Contract for ATS Taxi and Private Hire Vehicle Supply

- 6.1 Other initiatives have also been progressed that are contributing to a greater integration between ATS services. The outcome of the joint procurement involving both TfL and London Councils in securing a common service partner to deliver taxi and PHV supply for Taxicard, Capital Call and Dial-a-Ride (taxi supplement to minibus provision) is being finalised with the preferred supplier. The new contract is expected to be introduced for Taxicard on 1 October 2018 and no later than 9 July 2018 for the Dial-a-Ride and Capital Call elements.
- 6.2 The new contract will deliver a number of important customer enhancements for Taxicard users such as improved complaint handling and enhanced web and app-based booking options. It will also deliver common driver quality standards for all three services. The new contract, for example, includes a requirement for all drivers delivering journeys under the contract to have passed an e-learning module, developed by TfL. The e-learning module is based on Dial-a-Ride driver training that includes elements of disability equality training, safeguarding and other customer care requirements. Other specific customer facing improvements to Taxicard will be jointly announced by TfL and London Councils once the timetables for the introduction of the improvements have been finalised.

## **7 Further Integration of Assisted Transport Services Provision**

- 7.1 By the beginning of July 2018 the operation of the Capital Call scheme will be integrated within TfL On Demand Transport<sup>1</sup> alongside the Dial-a-Ride service, enabling a higher quality standard to be delivered for Capital Call's PHV based journeys in common with the other ATS services. The in house operational delivery of Capital Call will also enable TfL as the sole funder of the scheme to benefit from economies of scales resulting from the sharing of overheads and the use of the ATS integrated taxi and PHV contract. The level of virtual budget and booking hours will remain unchanged for Capital Call customers in the ten boroughs where the scheme operates.

## **8 Next Steps**

- 8.1 TfL will continue to work to deliver the outcomes required to deliver the ATS Vision. Updates on progress will continue to be provided to the Panel at six monthly intervals.

### **List of appendices to this report:**

Appendix 1: London's Assisted Transport Services – core activity

Appendix 2: The journey towards the vision for a world class ATS

Appendix 3: Further details of the Assisted Transport pilot

### **List of Background Papers:**

Assisted Transport Services, Customer Service and Operational Performance Panel - 1  
November 2017

Social Needs Transport, Customer Service and Operational Performance Panel - 13  
July 2017

Contact Officer: Claire Mann, Director of Bus Operations, Surface Transport  
Number: 020 3054 9465  
Email: ClaireMann@tfl.gov.uk

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<sup>1</sup> The new TfL department that has responsibility for Dial-a-Ride, Travel Mentoring, Capital Call and TfL's interest in the Taxicard scheme.

## Appendix 1: London's Assisted Transport Services

The services that are being defined as core ATS activity are outlined below, each with a brief summary of their customer proposition and current funding arrangements.

	<b>Customer proposition</b>	<b>Funding arrangement</b>
<b>Dial-a-Ride</b>	Multi-occupancy mainly bus based service booked in advance, requiring customer flexibility over time of travel. Free to the user.	Funded by TfL.
<b>Community Transport</b>	Borough based local community organisations, usually with charitable status, offering door-to-door journeys for groups and individuals in a local area through minibus and community car share services.	Funded through a variety of means, including London borough grants, charitable sources and commercial contracts. Some CTs are supported by TfL following the award of Dial-a-Ride MOAT contracts through a competitive tendering process.
<b>Taxicard</b>	Individual taxi based service, subsidised up to a limit per trip. Annual limit of trips, typically 102 p/a. User contributes £2.50 in cash at time of journey.	Majority (80%) funded by TfL, with a contribution from the London Boroughs. Managed by London Councils.
<b>Capital Call</b>	Individual PHV based service, closed to new members and only operating in 10 boroughs. Virtual cash budget of up to £200 with more flexibility on journey length than with Taxicard. User contributes between £1.50 and £7.50 depending on journey length.	Funded by TfL.
<b>Statutory social care and educational transport</b>	Services that provide access to day centres and schools for those facing mobility barriers.	Funded and managed by London boroughs.
<b>Non-emergency hospital transport</b>	Free transport to and from hospital for people with mobility barriers.	Funded by the NHS.
<b>Travel Mentoring</b>	Provides confidence building individual and group travel training and mentoring opportunities to help disabled people become independent travellers.	Funded by TfL.
<b>Mobility Aid Recognition Scheme</b>	Enables mobility scooter users of appropriate size and weight to use them aboard buses and some other modes of public transport.	Funded by TfL as part of its Travel Mentoring Service.
<b>Disabled Person's Freedom Pass</b>	Travel concession in the form of a specially branded Oyster card/photocard issued by local boroughs, providing free public transport travel in London.	Funded by London boroughs, through London Councils.

## Appendix 2: The journey towards the vision for a world class ATS

Improvement initiative	Detail of initiative	Status in November 2017	Current status
<b>Delivered:</b> Diversification of Dial-a-Ride fleet	Dial-a-Ride split into commissioning (ATS) and delivery (Dial-a-Ride Fleet Services).	Delivered April 2016.	Delivered.
<b>Delivered:</b> Supporting and promoting locally based assisted transport services	New MOAT Contracts for delivery of a proportion of Dial-a-Ride journeys. Ongoing sharing of best practice, working towards greater comparability of service standards for broader social benefits.	Contracts delivered between June and October 2017.	Delivered.
<b>Delivered:</b> Improving Dial-a-Ride scheduling and customer offering	Introduction of real time scheduling and dispatch Real-time customer information on vehicle arrival times.	Delivered June 2017.	Delivered.
	Improved use of local knowledge in scheduling – through use of experienced drivers to review scheduling of regular group journeys.	Ongoing from July 2017.	Delivered.
	Removal of 5 mile trip limit – journeys accommodated based on availability, not refused purely due to distance.	Launch planned for November 2017 (press release).	Delivered (announced through Dial-a-Ride In Touch magazine in November 2017).
<u>ATS Action 1.</u> Data analysis to understand customer choice between ATS and mainstream services	Analysis of existing data to understand interactions and factors determining choice of usage of Dial-a-Ride, Capital Call, Taxicard and mainstream public transport.	Discussions with London Councils to gain agreement to share relevant data during 2017/18.	Data sharing agreements are being finalised between TfL and London Councils in order to proceed with the Assisted Transport Pilot. These will provide a basis from which future, ongoing data analysis will be able to take place more generally across ATS services and linking ATS travel patterns with those on mainstream modes. This will contribute to the integration of ATS strategic planning with mainstream public transport planning.  Target for agreements to be in place: 31 July 2018 to allow for review of GDPR implications by both the London Councils and TfL Privacy teams.

Improvement initiative	Detail of initiative	Status in November 2017	Current status
<p><u>ATS Action 2.</u> Developing a new umbrella identity for Assisted Transport Services, reflecting the partnership involved in their delivery Greater integration of service standards between the various assisted transport services (Dial-a-Ride, Capital Call and Taxicard)</p>	<p>TfL Corporate design to develop a new identity for ATS services.</p>	<p>Delivery planned for January 2018.</p>	<p>A proposed identity for ATS services reflecting the partnership between TfL and London Councils has been developed. Consultation over the proposed identity has taken place with London Councils and is awaiting final internal TfL approval – expected to be confirmed by latest 30 June 2018.</p>
	<p>TfL/London Councils Joint framework for the procurement of taxi and phv elements of all three services, setting up common customer service standards and performance management structures (including greater stakeholder input).</p>	<p>New contract due to be awarded in April 2018.</p>	<p>A preferred bidder has been identified and TfL/ London Councils are in final stages of negotiation before official announcement of the tender result, expected by 15 June 2018.</p>
<p><u>ATS Action 3.</u> Increased awareness of the range of potential transport options for particular journeys</p>	<p>Integrated customer information and marketing of ATS alongside accessible public transport options.</p>	<p>Delivery planned for April 2018 (pending discussion and agreement with London Councils).</p>	<p>. An integrated Delivery Group has now been established. It has been decided that the timing of delivery for this action is best placed to commence in September 2018, as this will enable a detailed review of existing knowledge of the outcomes of previous awareness campaigns to take place and to use data gathered from the Assisted Transport pilot to evaluate the effects of new initiatives that might be introduced.</p> <p>Campaign now scheduled to commence in September 2018.</p>

Improvement initiative	Detail of initiative	Status in November 2017	Current status
<p><u>ATS Action 4.</u> Launch a 'one stop shop' platform for Assisted Transport Services</p>	<p>Web-based membership application facility Development of web-based application facility for Dial-a-Ride with potential to include Taxicard applications.</p>	<p>Delivery by April 2018 (Taxicard inclusion subject to agreement with London Councils).</p>	<p>Technical issues mean that the on line membership form for Dial-a-Ride is still in development and timescale for delivery has not yet been confirmed.</p> <p>TfL Technology and Data target for delivery by 31 July 2018.</p>
	<p>Dial-a-Ride and Capital Call merged booking centre.</p>	<p>Delivery due April 2018.</p>	<p>The transfer of Capital Call to be delivered through TfL is due to take place in early July to coincide with the implementation of the new joint contract arrangements covering Dial-a-Ride and Capital Call.</p> <p>Target for delivery no later than 9 July 2018.</p>
	<p>More integrated customer complaint and feedback system for all three services.</p>	<p>From October 2018 (subject to discussion and agreement with London Councils).</p>	<p>Capital Call complaints and feedback will be integrated within TfL's procedures as from early July. Taxicard procedures will be reviewed as part of mobilisation discussions leading up to start of new Taxicard contract in October 2018.</p> <p>New complaint handling procedures for Taxicard will be in place in time for new contract launch on 1 October 2018.</p>
	<p>Enhanced web and app-based booking for taxi and phv supply for core services. Potential enhancement arising from letting of new contract from October 2018.</p>	<p>Action by TfL/London Councils.</p>	<p>On track for delivery as part of launch of new contract.</p> <p>Timetable is subject to negotiation with preferred bidder and will be agreed in advance of launch of new contract on 1 October 2018.</p>

(Action 4 cont.)	Initially to be hosted on the web, providing a single platform from which to access all ATS services: Dial-a-Ride, Taxicard, Travel mentoring, Mobility Aid Recognitions Scheme and accessible public transport information.	Target for web-site platform during 2018/19 pending discussion and agreement with London Councils (over Taxicard inclusion).	<p>At the workshop mentioned above, it was agreed that a detailed review of customer requirements should be the first stage of this work, and that two phases of web development should be planned. The first, aiming to be in place for September 2018 for the reasons given in Action 3, will introduce basic improvements with a second phase to be introduced following the end of the Assisted Transport pilot in October 2019, building on qualitative data that will be gathered from the participants as part of the pilot evaluation.</p> <p>The interim evaluation stage of the pilot in April 2019 will be used as the starting point to begin scoping of phase 2 of the web improvements.</p>
	Explore potential for greater integration between Dial-a-Ride and Taxicard booking and dispatch centres arising out of launch of new joint contract framework for taxi and PHV supply.	From October 2018 (subject to discussion and agreement with London Councils).	<p>This is part of the ongoing joint work with London Councils and is scheduled to take place once contract mobilisation discussions are completed with a view to introducing some integration measures within 6 months of contract introduction.</p> <p>Monthly contract performance meeting between supplier, TfL and London Councils will commence in October 2018 and will be the forum at which these discussions will take place.</p>
<u>ATS Action 5.</u> Expand marketing of accessible transport improvements, Travel mentoring services and the Mobility Aid Recognition Scheme to Freedom Pass and Blue Badge holders	Targeting key groups for modal shift a) potentially from door to door to bus services and b) from car journeys to bus services and other public transport options.	From April 2018 (pending agreement with London Councils).	<p>The timing for this action is due for discussion with London Councils once the Assisted Transport pilot has commenced. Target date for marketing plans to be agreed – September 2018.</p> <p>Target for completion: 31 July 2018.</p>

<u>ATS Action 6.</u> Pilots	Pilots in two London boroughs alongside free Dial-a-Ride service. Data analysis to understand the choices and interactions between the different ATS services and between ATS and mainstream, how best and to what extent modal shift can be achieved.	Pilot to run April 2018- April 2019 (discussion ongoing between TfL, London Councils and potential partner boroughs).	The pilot will evaluate travel behaviour and customer experience of circa 300 participants from April 2018 to October 2019 in Southwark and Hounslow. See section 5 of main report for more details.
<u>ATS Action 7.</u> Consider opportunities to harness knowledge from demand responsive transport to improve assisted transport offerings	Explore potential for use of DRT scheduling systems to improve efficiency of ATS multi occupancy services (Dial-a-Ride).	Discussions within the Transport Innovation team during 2018/19.	Progress on the DRT trials is being monitored.  Ongoing. Future work to be aligned with the DRT trials timetable once confirmed.
<b>Improvement initiative</b>	<b>Detail of initiative</b>	<b>Status in November 2017</b>	<b>Current status</b>
<u>ATS Action 8.</u> Scope possibilities for including health services transport in ATS one stop shop platform.	Proposal to be developed to undertake a pilot in a single borough of integrating non-emergency patient transport services into one stop shop platform, based on a contractual arrangement with CCG.	Discuss possibilities internally with a view to commencing research by January 2018 and a local pilot in April 2019, building on the outcome of the pilots.	It was initially planned to try and work with a University to conduct the initial scoping research into health transport, but it has proved difficult to identify a relevant expert. Ways to progress this Action will be a focus for the ATS Steering Group in coming months.  On the agenda for the September 2018 ATS Steering Group to agree plan for further action.
<u>ATS Action 9.</u> Following pilots and blended/ standalone DRT, use lessons	Details to be developed through pilots.	Aim to extend ATS integrated platform to multiple partnerships by year end 2020/21.	Opportunities for linking this action to other projects within TfL are being actively monitored.  Scoping work is planned to start in April 2019,

<p>learned to further develop the ATS one stop shop platform beyond TfL/London Councils to include NHS funded services, third sector services and new forms of public transport where appropriate.</p>			<p>based on interim evaluation report for the Assisted Transport pilot, with a target of October 2019 for strategy to be confirmed.</p>
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## Appendix 3: Further details of the Assisted Transport pilot

### Pilot Objectives

	Strategic	Customer	Operational	Commercial	Financial	Technology & Data
Aim:	To develop and test a new framework for assisted transport services that improves choice, flexibility and usability and also encourages use of public transport, in line with objectives of draft Mayor's Transport Strategy	To reduce unnecessary restrictions embedded into current Taxicard and Capital Call customer propositions and expand customers' horizon of perceived choices.	To develop cost effective means of allocating limited assisted transport resources that also gives customers visible choices between services.	To establish a framework through which individuals or third party organisations can potentially financially support assisted transport journeys in the longer term.	To understand the financial models and mechanisms required to support virtual cash assisted transport allowances and modal shifts towards public transport.	To create a customer centric admin system from which data can be easily recorded for future planning purposes.
Rationale	'The draft Mayor's Transport Strategy calls for assisted transport services to become more flexible and convenient for its users and better integrated with other public transport services.	Create more choice and flexibility over transport decisions for customers facing accessibility challenges whilst also retaining safeguards for the most vulnerable customers.	Trial new mechanism through which to operate virtual cash based assisted transport allowance as a means of resource allocation.	To provide a way to capture financial contributions in the future from other authorities where appropriate (e.g. NHS transport; social services).	Inform future budget allocation, cost apportioning and management models.	Reporting and analytics to inform future planning of assisted transport services, public transport and potential commercial partnerships.
Questions answered/ concerns addressed	How to deliver more customer choice, flexibility, ease of use and strategic modal shift whilst remaining cost neutral through more efficient delivery and administration.	To what extent are customers able to choose? Is sufficient choice being offered? What information do customers need to make informed choices?	Can we enable more efficient customer choices between assisted transport and mainstream transport to be made available through operating assisted transport allowances?	Are other authorities interested in 'topping up' virtual cash purses to cover additional transport requirements?	How can we meet customer needs whilst also ensuring good financial management for funders?	Balance between preventing fraudulent activity and making services easy to use.
Measures/ metrics:	Stakeholder and delivery partner feedback measured against objectives of Mayor's Transport Strategy. Customer satisfaction ratings and use of public transport before and after pilot.	Analysis on changes in demand/ modal choices from baseline.	Analysis on changes in demand/ modal choices from baseline.	Feedback from individuals and other authorities on level of interest in buying into framework – during and at end of pilot.	Number of users over-spending/ under-spending their allocated budgets and number of users requesting advances. Modal shifts towards public transport.	Ease of use of proposed solution for customers and of data created for planners to extract relevant information.

## Sample sizes:

	Taxicard	DaR
Population sizes	2755	567
Sample size (per proposition)	93	82
Total sample size assuming 2 propositions	186	164
Plus contingency recruitment	20%	20%
	<b>223</b>	<b>197</b>

## Pilot success criteria

High level success criteria for the pilot have been identified in accordance with the main objective areas of the pilot. The Pilot Steering Group will agree success measures in advance of the pilot propositions being launched in October 2018.

Strategic	Customer	Operational	Commercial	Financial	Governance
Achievement of Mayors Transport Strategy: customer feedback on flexibility and convenience of assisted transport and the level of integrated with other public transport modes	Improves customer choice: Customer feedback on ease of use	Changes in demand can be identified and understood: Comparison of travel behaviour survey before and after the pilot and an understanding of any modal shift.	Viable commercial framework: Level of interest from authorities and individuals in “buying into” framework	Provides a viable way of allocating resources: Funding is cost neutral for TfL and Boroughs. The amount allocated per person is reviewed and the associated usage profiles analysed.	Establish framework with an agreed RACI for ongoing partnership between TfL/ London Councils and the Boroughs

### Note:

- (1) Customer choice will be represented as a choice between modes and within realms of existing contracts for example choice between Taxicard and DaR trips not between different Taxi providers.
- (2) Commercial objectives will be achieved through separate research/ dialogue with hospitals and third parties