



transportfocus

<b>Purpose of report</b>	<input checked="" type="checkbox"/> Decision	<b>All projects require this form to be completed and forwarded to the CEO team for Management Team approval before proceeding.</b> This is true regardless of whether the project is funded from our unallocated budget. All projects should be aligned with business plan deliverables. Projects over £50K need board and DfT approval.
<b>Sensitive Information?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Note:</b> indicative costs should be included in this brief which, once approved by the project sponsor and management team, provides the authority for funds to be committed within a permitted variance (greater of 5% of the total cost or £250). Cost variances outside the permitted range mean the project cannot proceed until Management Team approval has been given for the reworked costs.
<b>Project Step</b>	<b>Project Brief</b>	
<b>Workplan aim</b>	Work to improve the user experience	
<b>Project Title</b>	Bus priorities for improvement & trust	
<b>Project Sponsor and budget holder</b>	Mike Hewitson	
<b>Project manager</b>	Murray Leader (author)	

## 1.0 Summary

**Please provide a max 100 word project summary, including any background history if relevant**

Two important Workplan objectives are to update the 'bus priorities research' (last conducted in 2010) and investigate 'relationship with bus companies' (i.e. corollary to the trust work on rail conducted on rail passengers last year). These objectives were combined as they are fairly interrelated and there are advantages in doing so: cost; combinative analysis.

Although the objectives are combined, it has been structured as two streams of work. The first stage is to provide a full, up to date understanding of bus passengers; to understand the motivations, the emotional and rational transport choices people make, and provide a deeper view of the on-bus experience. Included also is checking whether the priorities tested in 2010 are relevant now. This first stage has a budget of £49,000. The output is intended to have standalone value, but critically feed into the 'quantitative' stage of priorities and trust.

The second stage should provide the following:

- 1. Bus Passenger Priorities that are current and segmentable by main groupings (to be determined but expected to be location type city, town, rural), fare payer, free pass, gender, journey purpose).**

**2. A quantitative output on bus passenger trust – similar to that with rail passengers**

**3. A high level view of barriers to use for non-users/‘infrequent’ bus users.**

This output will be of a similar genre to the recent rail priorities and its bus priorities predecessor; outputs will include infographics and ‘priorities simulator’. It is hoped that the approach taken on priorities will enable third parties to fund extra responses in their local authority area or bus operator area for them to get locally granular results.

Whilst establishing the priorities of bus users we will encounter a wide spectrum of bus usage rates (all the way to ‘infrequent and non-users’). So in stage 2 we will take the opportunity for the sample to include a segment of infrequent/non-users to assess their barriers to bus use/increased bus usage. We will also examine trust in a quantitative manner taking forward the stage 1 output to generate output similar to that on trust among rail passengers.

**The proposed spend for stage 2 is £75,000.**

There is great external interest in this work due to the emerging political environment – including Northern Powerhouse and quality contracts but especially bus franchising. There is a major evaluation of bus franchising by TfGM (an area with 200m bus passenger journeys annually) which will happen around September.

It was originally intended that the second stage would follow sequentially after stage 1. Following a meeting between Transport Focus and TfGM it has been flagged the output would have greatly increased value if ready earlier. Whilst the ideal time frame of end August is not achievable, it would still be very useful if much of the output of stage 2 could be achieved in the final week of September. A full report of the output would be available late October and published as soon as possible afterwards. **This is possible if stage 2 set up work is undertaken whilst stage 1 is progressing.**

As the proposed spend is over £50,000 this project needs Board approval. Ordinarily this project plan would have gone to Management Team first, followed by Board approval. To facilitate the shortened timescale, the opportunity for Board to signal their positivity towards the project was taken by running this proposal past Board Members at the 18 June Members Event. Members affirmed their in-principle interest in this project. Now Management Team approval is sought. Upon this being granted, Members confirmed they would accept the project proposal ratified by Management Team being sent round for out of session Board approval.

	Our recommendation is to approve this proposal
<b>1.1 Core Information</b>	
<b>How does this project fit into our longer term aims, and / or the current year's Work Plan themes or priorities?</b>	The current workplan states that we will undertake this trust project 'to understand their relationship with bus operators and to see where general perceptions differ from real-time journey experiences' and that we will carry out bus passenger priorities research.
<b>How will the results of this project be disseminated?</b>	<p>We can use the output to inform policy on bus franchising.</p> <p>We can input to the metropolitan area debates on bus franchising</p> <p>As we expect significant general interest in this work, we would expect to be able to share this widely with PTE's, local authorities and operators as well as usual publication of reports and simulator.</p> <p>It would also provide useful basis for an event on buses.</p>
<b>Measurable outcomes and benefits of the project</b>	<p>Completed priorities for improvement among bus users, along with a simulator</p> <p>An understanding of what constitutes trust by bus passengers</p> <p>Feed into questionnaire Bus Passenger Survey question(s) on trust</p> <p>Some understanding around barriers to (any or greater) bus use</p>
<b>Impact or consequences of not doing the project, or not doing it now.</b>	<p>If project is not done this year, we will not achieve two important elements of the workplan.</p> <p>If done sequentially, the results will miss the opportunity to be utilised whilst the direction on bus franchising is being established.</p>

## 1.2 Further information

What is the cost and variance?	Cost type	Amount	Third party providing funding	Amount
	Commissioned research	68,000	Research agency to be selected	
	Output modelling	5,000		
	Publication	2,000		
	Distribution			
	Stakeholder engagement		Management fee (if any)	
	Other (please provide details)			
	<b>Total (including VAT)</b>	<b>£75,000</b>	<b>Total (including VAT)</b>	<b>£</b>

  

<b>Cost breakdown (indicate the estimated amount of costs that will occur in each month)</b>	If the length of the project runs into a new financial year, please copy and paste the below table and complete as necessary.					
		<b>Year: 2015-16 budget year</b>				
		<b>Aug 2015</b>	<b>Sept 2015</b>	<b>Oct 2015</b>	<b>Nov 2015</b>	<b>Total</b>
	<b>Income (£)</b>					
	<b>Expenditure (£)</b>	<b>38,000</b>	<b>30,000</b>	<b>5,000</b>	<b>2,000</b>	<b>75,000</b>

**Outline plan**

Proposed start and end dates for the project and key milestones or stages. Highlight if applicable, any external or third party drivers that dictate deadlines. Include details of people or teams involved in the delivery and what their roles will be.

Key stages	Start date	End date	Team/Staff Resource <i>(indicate roles in project)</i>
Research tendered/ commissioned	Early June	17 July	Murray Leader – research design Jocelyn Pearson – policy input
Quantitative fieldwork	End August	Early Sept	Research agency & Insight Team
High level results available to TF	Mid September	Mid September	Murray Leader – Insight Team
Internal discussion to agree next steps and each Teams activities in taking it forward	Mid Sept	Mid Sept	Murray Leader – Insight team Jocelyn Pearson Comms Passenger Team
Full version of main results to TF	End Sept	End Sept	Murray Leader – Insight Team
Disseminate main results to core audience	End Sept	End October	Murray Leader Jocelyn Pearson Passenger team Communications team
Wider dissemination & publication	Early Nov	Onwards	Murray Leader Jocelyn Pearson Passenger team Communications team

<b>Risks, dependencies and constraints</b>	Project timescale tight. Might take a little longer if an online fieldwork not appropriate.
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### 1.3 External Stakeholders involved in delivery

List all external stakeholders who have a key interest in the outcomes of the project. **Important: put a ✓ in box X if there is a requirement (as a matter of policy, agreement or courtesy) to consult with this stakeholder BEFORE any project deliverable is finalised (eg printed or launched)**

Name	Organisation	Role	X
1	Transport for Greater Manchester		
2	Other 5 PTEs		
3			
4			
5			

### 1.4 Impact assessment screening

Please confirm that privacy and equalities impact assessment screening has been completed for this project. Change the default values if appropriate.

Screen	Screen complete	Full impact assessment necessary?	Comments

<b>Privacy</b>	<b>Yes</b>	<b>No</b>	
<b>Equalities</b>	<b>Yes</b>	<b>No</b>	

### 1.5 Key Performance Indicators

**Timescales:** establish target dates and milestone owners for the project's, end and review. Any other key project milestones should be established in the outline plan section of the project brief. The start date is the date the project is approved by Management Team.

	<b>Milestone</b>	<b>Target date</b>	<b>Milestone owner</b>	<b>Comments</b>
A	Main research/project work completed	End September	Murray Leader	
B	Publication/dissemination	October	Jocelyn Pearson Comms Team	
C	Project review (D+30 days max)	End November	Murray Leader/ Jocelyn Pearson	

**Quality:** the project team should discuss and agree which of the identified project outcomes and benefits should be measured for quality monitoring purposes. You may choose up to three. In each case, you should demonstrate how you will measure success.

	<b>Selected project outcomes and benefits</b>	<b>How quality will be measured in the project review</b>
C	Successful design of quantitative stage – to suitable measure passenger priorities	Insight Team management
D	Results well-received by core external audiences	Review by project team, including external stakeholder feedback
E	Good use of results by wider bus industry stakeholders	Review by project team, including external consultation

**Costs:** identify whole of project costs

	<b>Cost element</b>	<b>Target £</b>	<b>Owned by</b>	<b>Comments</b>
F	Total approved cost	75,000	Mike Hewitson	

## 2. Privacy impact assessment screen

This PIA screen **must** be completed for every project in category B and above, and for category A projects that demonstrate data vulnerability or unknowns. However, the term “project” should be interpreted loosely and refers to whatever the activity or initiative it is that the organisation is assessing, including new systems, changes to processes, databases, services, schemes, data sharing, outsourcing, reviews etc - or changes to any of these.

*The full Privacy Impact Assessment*

You should only carry out a full PIA if you are implementing or making a change to a process or system that *could or is likely to* have an impact on the privacy of individuals. If you are sure that there are no privacy implications in what you are doing, there is no need to do a full PIA.

**However, the only way to be sure that a full PIA is not needed is complete the PIA screen**

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A. Using the list of key stakeholders you identified in table 1.3, map the primary data flows

The research agency will collect information (responses to questionnaire on bus priorities) direct from passengers. They operate in accordance with the research code of conduct and adherence to data protection legislation. If they do provide any data to Transport Focus it will be de-personalised.

[illegible]




*Key to abbreviations*

<b>(i)</b>	Please select either <b>UN</b> unclassified; <b>SCOM</b> sensitive commercial; <b>SPOL</b> sensitive policy; <b>SSTAFF</b> sensitive staff; or <b>SPER</b> sensitive personal protect
<b>(ii)</b>	Please state monthly, weekly, one-off or ad-hoc
<b>(iii)</b>	Please state <b>LOW</b> where dataset is 50 or less; <b>MEDIUM</b> where dataset is more than 50 but less than 1000; <b>HIGH</b> where dataset is 1000 or greater
<b>(iv)</b>	Please state via email, mail, courier or other

	Please answer the following questions and comment if necessary	YES/ NO?	COMMENTS
1.	Does the project involve new or different IT hardware or software that has <i>substantial</i> potential for privacy intrusion?	No	
2.	Does the project involve the intrusive identification of 'personal-protect' data subjects?	No	
3.	Might the project have the effect of changing current personal anonymity arrangements?	No	
4.	Does the project involve <i>multiple</i> organisations, whether they are government agencies or private sector organisations?	Yes	Research agency

5.	Does the project involve new or significantly changed handling of personal data that could be of particular concern to individuals?	No	
6.	Does the project involve changing the way we handle multiple records of personal data about each individual in a database?	No	
7.	Does the project involve new or significantly changed handling of personal data about a large number of individuals? If so, how many?	No	
8.	Does the project involve new or significantly changed configuration of personal data from multiple sources?	No	
9.	Does the project's justification include significant contributions to public security measures? (This is unlikely)	No	
10.	Does the project involve systematic disclosure of personal data to, or access by, third parties that are not subject to any kind of privacy regulation? If so, explain who and why.	No	

### 3. Equalities impact assessment screen

Sometimes, an equalities impact assessment (EIA) is required for a given report, proposal or project. To help decide whether an EIA is required, a screen must be undertaken based on the information provided above. The screen seeks answers to four questions which are used to determine impact on the protected characteristics – **major, minor or none** (default). Please choose the correct impact value and, if **major**, link it to an explanation below.

Gender	Age	Sexual orient'n	Disability	Marital status	Political belief	Religious belief	Racial group
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1. What is the likely impact on equality of opportunity for those affected by this proposal, for each of the Section 75 equality categories?							
None	None	None	None	None	None	None	None
2. Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories?							
None	None	None	None	None	None	None	None
3. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group?							
					None	None	None
4. Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?							
					None	None	None

Summary of **major** impacts (if any)

**No major impacts**

Conclusion (the management team's consideration of this paper may result in a change of conclusion)

Based on the information above, and having regard to the guidance below, the sponsor and author of this paper agree that (✓)	
(a) A full equalities impact assessment is <b>not</b> required	✓

(b) A full equalities impact assessment is <b>not</b> required at this time but the impact values above suggest the matter should be kept under view during the lifetime of the project	
(c) A full equalities impact assessment is required and should be completed during the lifetime of the project	
(d) A full equalities impact assessment is required and should be completed immediately	
<b>Please provide a brief explanation of why you have arrived at this conclusion</b>	
The proposal has little or no relevance to equality of opportunity or good relations and / or is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations for people within the equality and good relations categories.	