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Project Terms of Reference

Total Mobility Upgrade Project

greater WELLINGTON
REGIONAL COUNCIL

Draft

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Terms of Reference

Project name	Total Mobility Upgrade
Project Sponsor	Rhona Nicol, Manager Transport Procurement, Procurement and Infrastructure
Project Owner	Rhona Nicol, Manager Transport Procurement, Procurement and Infrastructure
Project Manager	Chrissy Dowland, Total Mobility Manager, Procurement and Infrastructure

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Background

The Total Mobility Scheme provides door to door transport for people who are unable to use the existing public transport system within their regional area because of a mobility impairment. The scheme is delivered through the taxi industry, where registered users may access a half price taxi fare claimed on the presentation of a Total Mobility voucher.

People wishing to access the scheme may do so either directly through the Council (by means of our contracted assessor) or they may join an agency of support, (For example RNZ Foundation of the Blind.) Agencies participating in the scheme provide an appropriately skilled person as an mobility assessor for the scheme (For example a field officer from the agency)

Currently all Agencies who provide Assessors have no formal contract with the Regional Council. They register their Agency and Assessors with the Regional Council by sending a form through to Total Mobility.

The Assessor's role is to visit the person with impairment and obtain all relevant details and statistical information required on the Total Mobility Application form. When the form is completed, it is then sent to Total Mobility for confirmation of acceptance onto the scheme.

Once the Application form has been reviewed by Total Mobility, then a decision is made on whether the applicant meets the prerequisites to be accepted on the scheme. All Application form details are entered into the current ACCESS database system.

If the application has been declined, a letter is sent to the Agency. The Council also sends advice to the applicant.

If the application has been accepted, a letter is sent to the Agency and the client. The Assessor then provides the applicant with a pink voucher book.

When a Total Mobility user undertakes travel via a taxi, a voucher is presented to the Taxi Driver at the end of the journey; the required details on the voucher are entered by the User and the Taxi Driver. The User then pays the remaining 50% of the fare or any amount that is greater than the maximum allowable reimbursement.

The vouchers are then collated by the Taxi Company, and an invoice is sent to Greater Wellington Regional Council for the reimbursement of the remaining half of the taxi fare. Upon verification of the vouchers Total Mobility officers authorise payment through the Finance division. The maximum amount the Council will reimburse for any trip is half the fare up to $40.00 (NZD). Taxi companies are able to claim a 5% handling fee on every tax invoice presented to Greater Wellington Regional Council for the 50% reimbursement of Total Mobility taxi fares.

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The scheme has developed over the years on an "understanding" between the taxi industry and regional councils – however the Ministry of Transport review recommends that regional councils' now initiate a formally contracted system of service delivery.

The scheme has worked effectively for a number of years, the number of clients using the system has increased in size (there are approximately 7,500 registered users in the region with an increase in the 2004/05 year of 13.5%, extract from the annual report on the "Regional Transport Strategy 2004/5", there are now a number of problems associated with its operation.

Project justification

Phase Two of the Total Mobility Review includes the following recommendations from Land Transport New Zealand (LTNZ):

- *LTNZ encourages local authorities to establish systems for data collection, monitoring and evaluation.*

- *LTNZ encourages local authorities to improve their administration systems for the allocation and redemption of trip entitlement vouchers.*

- *LTNZ develops guidelines for contracts between local authorities and Total Mobility Scheme transport operators to ensure high quality and adequate service levels, including the provision of wheelchair accessible taxis within the fleets.*

- *LTNZ develops guidelines for contracts between local authorities and assessment agencies to ensure high quality and consistent assessments*

The current system does not provide a source of reliable information about drivers, user patterns, the client base or travel costs. Reporting capacity is limited and consequently our ability to target client needs is restricted.

The current schem is open to a number of areas of possible misuse

- Total Mobility Users can be exploited by drivers because of their vulnerability
- Taxi drivers are currently unable to identify whether the person using the voucher is the entitled user.
- The current scheme is reliant on driver honesty with regard to the information provided on the Total Mobility Vouchers.
- A client and a driver may collude to defraud the scheme
- The only current safeguard against misuse is extensive audit of the system

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The scheme has become very paper intensive; Each trip is represented by a voucher and officers must audit several thousand each month. An electronic system would reduce handling, the hours involved and would provide an improved reporting capacity It would also provide a higher level of protection for clients by limiting risk exposure.(An electronic charging system operated through the taxi meter prevents interference)

A number of taxi companies redeem their vouchers through factoring companies. Factoring adds transaction costs and these are generally passed on the Total Mobility passenger as an additional fare cost. Introduction of a contracted service and an electronic system would control provision of the service and prevent any additional charges being passed on to users.

There is a general lack of accountability for service provision and training.

Contracting the service would provide service accountability and would enable the Greater Wellington Regional Council to require the introduction of a smart card technology. Contracting would also enable the Greater Wellington Regional Council to ensure that driver training for the transport of passengers with special needs will be undertaken, ensuring we obtain a quality service.

The present Total Mobility voucher requires the travel and fare information from the user, and cab and log book details from the taxi driver. These expectations can be quite onerous. The introduction of a Smart/ID card system would simplify the transaction from both user and drivers perspective as the system would supply the relevant information. The information could be electronically transmitted to Greater Wellington Regional Council, this would allow immediate data verification.

An appropriate smart card system would prevent most opportunities for fraud.

Contracting agencies and assessors would enable Council to develop a consistent quality of assessment procedure. Contracts would specify obligations including, training, information requirements, assistance with investigations of misuse and financial contribution to costs. Contracting would provide a predictable and reliable structure for the scheme to operate within.

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Project benefits

Phase Two of the Total Mobility Review includes the following recommendations from Land Transport New Zealand:

- *LTNZ encourages local authorities to establish systems for data collection, monitoring and evaluation.*

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- *LTNZ develops guidelines for contracts between local authorities and Total Mobility Scheme transport operators to ensure high quality and adequate service levels, including the provision of wheelchair accessible taxis within the fleets.*

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Commitment to an electronic system would provide an added incentive to negotiate contract and training requirements for taxi companies and assessment agencies

Introduction of an electronic assessment process for assessment would mean a reduction of the paper based application/voucher system. An electronic system would give immediate access to information on line, and provide the capacity for quick confirmation of scheme membership and card production (or replacement if needed)

ID/smart Cards would provide taxi drivers with the ability to immediately confirm user identity and to access an immediate payment from Council.

An electronic system would reduce the administrative hours presently required of Council officers in audit. Energy could be focussed on service rather than identification of misuse

An electronic system would provide improved access to information, it would enable better audit capacity, ease of reporting (data and financial) and an increased ability to forecast for client and budgeting needs

An electronic web based system would provide the basis for a reliable, predictable, and high quality service at all levels of the scheme.

The ability to encrypt ID/smart cards would provide easier management of the different types of TM scheme user (short and part-time term users as recommended in Phase One of the Review).

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An electronic payment service operating through the taxi meter would reduce capacity for misuse (providing protection for the vulnerable client and for the Council from fraud).

The ability to ensure a "hot card" facility (cancellation in case of misuse) would institute better management procedures for the Council.

Stakeholder benefits

The Total Mobility Passenger
- Simplicity of use
- No opportunity for exploitation or fraud
- No additional factoring or unexpected fare costs involved
- Contracted service providers would be required to have drivers trained for transporting passengers with special needs
- Improved service quality

The Taxi Operator
- Simplicity of use
- No opportunity for fraud
- Ease of access to subsidised fare
- Limit to additional costs
- Financial assistance with installation of the appropriate technology
- Training for transporting passengers with special needs would be a requirement
- Improved service and information via better technology

The Taxi Company
- Simplicity of use
- No opportunity for fraud
- Ease of access to subsidised fare
- Financial assistance with installation of the appropriate technology
- Reduction to administration requirements and associated costs
- Contracted service accountability (appropriate training required for service delivery)
- Improved service and information via better technology

Greater Wellington Regional Council
- Better service for the Total Mobility passenger
- Better service relationships with the taxi industry
- Reductions to administration processes
- Limited opportunity for fraud
- Improved information
- Facilitation of contract agreements with taxi industry as service providers (Contracts with the industry are recommended in the MOT Review)
- The introduction of a smart/ID system would improve and streamline the service for the Total Mobility user as recommended in the Human Rights Commission Inquiry into the Accessible Journey
- Contracts with the taxi industry would specify and assist with instalment of the necessary technical equipment and would require driver training for transport of passengers with special needs.

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- The introduction of a smart/ID system would improve and streamline the service of the Total Mobility user as recommended in the Human Rights Commission Inquiry into the Accessible Journey
- Contracts with the taxi industry would specify and assist with instalment of the necessary technical equipment and would require driver training for transport passengers with special needs.

Project statement

Agencies of Support
- Funding assistance
- Consistency of assessment procedures
- Training provisions
- Service efficiency for client users
- Defined understanding of obligations

The project will define the planned activities, and oversee the progressive implementation of all agreed activities and changes required, coupled with the planning and implementation of a new electronic system.

Related project components will identify the core functionality we want the system to encapsulate and the strategies and tactics.

The project will specifically ensure there are;

- Agreed core values and that all communications are appropriate to reflect the requirements for the project
- Strategies to implement the vision (both short and long term).
- Tactics that ensure the system implementation and related activities are effective.
- Activities that implement all necessary contractual obligations and system functionality
- Related stakeholder communications

As a result the project will ensure that the new electronic Total Mobility System is effectively implemented, with the maximum positive impact possible, and consistent with desired results. The system will be well established with its target audience at the end of the implementation process.

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**Project
Assumptions**

All persons eligible for the scheme will receive a swipe card regardless of whether they are on the Independent or Supported user voucher scheme

Contracts will be in place with all taxi companies and agencies that provide Total Mobility services.

The technology required to provide the required functionality is available with the market place

We will contract with sufficient numbers of taxi companies who are capable of providing the required level of service

Project Scope

Vision
Is to enable eligible people with mobility impairment to access appropriate transport to enhance their community participation. Improved service by means of initiating a contracted service with improved delivery expectations via an electronic system and driver training

Communication Planning
Develop a Total Mobility implementation communication plan to identify and co-ordinate all communication activities, including; all major stakeholders
- Agencies
- Client Users
- operators
- councillors
- Land Transport New Zealand
- Ministry of Transport

Activity planning
Plan all supporting activities and engage with stakeholders and others to identify requirements and plan specific implementation activities.

Implementation
Implement all planned activities in a manner consistent with the agreed service values.

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Project objectives and deliverables

Objective	Deliverable
Plan strategies and activities	Workshops and meetings to develop the Project terms of reference, project plan
Initial communication re concepts	Stakeholder initial meetings to develop policy and contracts
Refine planning and processes with reference group	Comprehensive plan Meetings and workshops
Communicate detailed plan to key stakeholders	Briefing meetings and ongoing communications activities
Advise Passenger Transport Committee of new strategies, etc	Terms of Reference and Policy Document
Develop detailed specs and inventory of required activities	Specifications with supporting new electronic system
Brief key suppliers	Supply agreements
Establish supply agreements	Briefings and agreements
Implement to plan	

Project success criteria

1. That all service level agreements are met by all service providers.

2. The electronic functionality of the new system provides the benefits to all stakeholders (as stated within this document).

3. Actions to realise demonstrable service improvements are planned and executed.

4. Data required for reporting and by External organisations is readily available.

5. Timely and seamless mechanisms for Applicant Approval and Card issue.

6. Total Mobility User satisfaction (as measured by an annual survey) of all services.

7. All processes within the project are appropriately documented

8. The project is completed within the planned timeframes and budget

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Project approach　This is a significant under-taking which requires a lot of planning and stakeholder engagement, communication and management. Once planned thoroughly there will be a lot of implementation activities to co-ordinate, requiring very careful project management and monitoring.

Thus a lot of effort will be required in the planning phase.

Significant ongoing effort will also be needed to manage a number of very significant stakeholders effectively. Early stakeholder analysis and communication and management planning will be essential.

Regular stakeholder briefings will be held, and a project newsletter will be developed later in the project to provide ongoing project briefings to key audiences.

The project will need to progressively roll-out the Taxi Terminal and Smart Card elements.

Much of the project approach will be founded on progressive improvements and conveying a positive feeling of ongoing constructive change, rather than the expectation of immediate improvements.

The specific approach will be to:

- o workshop and plan extensively using an Advisory Group (The Project Reference Group)
- o engage subsidiary working partners
- o engage key stakeholders early and continuously via personal briefings and newsletters
- o implement ongoing change
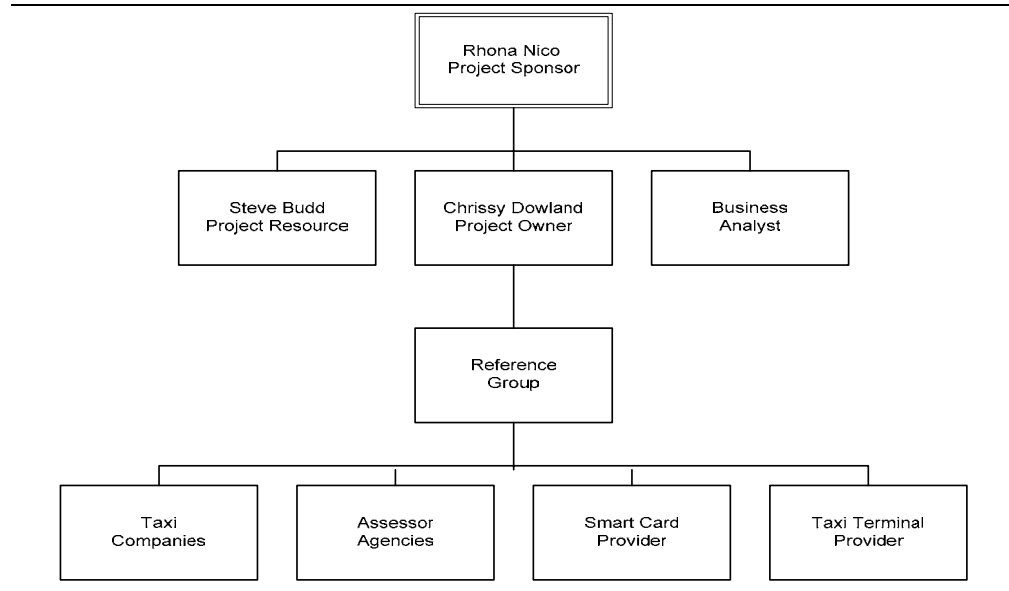- o involve all agencies, operators and key staff

Terms of Reference

Milestones

Milestone	Duration	Date
1. Completion of Terms of Reference		
2. Detailed Specification		
3. RFT – request for Tender		
4. Selection of Product - Terminal Provider - Smart Card Provider - Agency Assessor Process		
5. Proof of Concept for Each Service Provider		
6. Contractual agreements with all Agencies / Taxi Companies / Terminal Provider / Smart Card Provider		
7. Test Implementation of System		
8. UAT – User acceptance testing		
9. Pilot Implementation to run in parallel with Current System		
10. Full Production Implementation		

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**Project
structure and
resources**

Person	Role	Responsibility	Required
Sponsor	Resources/ business guidance	Approve project funding, and provide access to resources. Assist with stakeholder management	Sign this TOR and approve budget Manage high level stakeholder issues
Project Owner	Overall vision and ownership	Political and internal stakeholder management Organise contractual elements	Deliver key messages Contract key deliverables
Business Analyst	Co-ordinate agreed project activities	Agreed project deliverables Operator stakeholder management Provide project planning, oversight and communication	Project deliverables as agreed and defined in project plan. Maintain project plan and monitor performance vs plan
Project Resource	Business guidance	Advise on Technical Requirements	Provide technical overview of requirements

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Reference Group	Represents the community of Stakeholders	To examine and advise on documentation and processes associated with the project	Representation of the stakeholders interests
Taxi Companies	Represents Stakeholders	To provide the required service	Representation of the stakeholders interests
Assessor Agencies	Represents Stakeholders	To provide liaison and assessment between the client and the council	Representation of the stakeholders interests
Smart Card Provider	Represents Stakeholders	To provide the specified service	Representation of the stakeholders interests
Taxi Terminal Provider	Represents Stakeholders	To provide the specified service	Representation of the stakeholders interests

Project constraints

1. Constrained budget
2. Low number of internal support resources
3. Progressive roll-out
4. Multiple stakeholders
5. Contractual Negotiations

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Project risks

#	Nature of risk	Potential impact	Control activity	Residual risk
1	*Lack of stakeholder buy-in*	Delay, less than optimal support, poor service delivery, higher cost	Early and frequent involvement and communication. Early identification of issues and impacts and required corrective actions	Medium
2	*Poor co-ordination of implementation activities*	Confusion, extra cost	Early planning, briefings and ongoing monitoring through regular project meetings. Learn from previous roll-out and define new standards and processes – inventory and Identify all variations required	Low
3	*Poor delivery of actual service experience*	Denigration of system through negative experiences and adverse comment about services	Identify key service elements (Taxi terminals, data transfer and assessing process) that will be critical and develop plans to ensure these are delivered to a consistent standard (driver and assessor specific info programs)	Medium
4	*Time and/or budget overrun due to expansion of scope*	Delay, poor service delivery, higher cost	Careful review of proposed solution; make specifications subject to change control and approval; include budget allocation for unplanned items	High
5	*Software does not work correctly, leading to incorrect results and will require extra verification processes*	Delay in service and denigration of system through negative experiences and adverse comment about services	Thorough testing; running current process and new process in parallel; retain current system to allow back-out if necessary	Low
6	*Problems accessing or using system due to network*	Delay in service	Use sound, proven technical architecture; test thoroughly; ensure that the	Medium

	connectivity, performance or firewall/security issues		requirements for connect to the system are well documented and understood	
7	*Data migration does not process data correctly in all cases, leading to loss, inaccuracy or duplication of data*	Delaying of payments to taxi companies, time and resource expense to fix and re-verify results	Ensure check and balance processes are developed to enable verification against the data transmitted (file headers etc)	High

Related projects

Project	Description	Relationship

Indicative Project budget $ 200,000 - $300,000

Project control and information flow

There will be regular project meetings – held at least fortnightly – then weekly as required in late 2006. All meetings will be minuted with plans, actions, issues and risks being constantly monitored.

Fortnightly review meetings with project sponsor.

Regular meetings with key stakeholders
- Councillors through PTC
- Operators through regular meetings
- Project team through internal communications
- LTNZ and MoT through briefings

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Key stakeholders - *Transport service operators*
- *Public*
- *Regional Councillors*
- *LTNZ and MOT*
- *GW Staff*

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Approvals   **Project approved to proceed.**

....   Date ....

Name

Project Sponsor

Title

Project Terms of Reference accepted.

....   Date ....

Name

Project Owner 1

Title

....   Date ....

Name

Project Manager

Title