



transaid
transport for life

Patron: HRH The Princess Royal

Introduction to Transaid's Transport Management System Manual

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Introduction and Acknowledgements

This document provides a description of Transaid's Transport Management System (TMS).

The TMS is the result of work undertaken by Sarah Nancollas and the team from the Ministry of Health in Ghana between 1993 and 1996, particularly Alhaji Saaka Dumba. I would like to thank Charlotte Anderson for her analysis of the system and the writing of this summary of the TMS.

TMS is a system designed to enable government departments to manage all aspects of their transport, efficiently, cost effectively and transparently. It is a system based on the collection and analysis of basic information and the routine production of key performance indicators that allow transport officers, administrators and all those who need to use transport to deliver services, to monitor transport costs and performance, and to budget and plan for the future.

Transaid's TMS is the basis of the systems used by the Provincial Departments of Health in South Africa, and has been accredited as a recognised South African qualification. It has also been used by government departments of Malawi and Kenya.

The principles that underpin TMS apply to any type of transport operation and any scale. TMS is currently being adapted for use in the private sector with small scale enterprises.

This Introduction is not a substitute for the full TMS manual. It provides a summary of each of the elements in the TMS.

The Introduction is available in draft form in Portuguese on application.

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Transport and Transport Management

1) Situation Analysis

It is vital to ask your self ‘what do we do at the moment with our transport, where, how, why and who does it?’ By covering this type of situation analysis you will be able to identify the strengths and weaknesses of your operation and how to move forward in a positive manner.

1.1) The Approach

The greater the attention given to the situation analysis, the more valuable the result will be, and the end result should enable you to build the foundations of the Transport Management System and ensure that you develop the current operation.

This process will require:

- **Commitment:** the project must be fully understood and supported by the entire team
- **Access:** all doors must be open and transparency will be vital, as the result desired is a completed piece of work that is owned by the department/organisation as a whole
- **Effort:** high levels of effort equal high quality results, the team must understand that this analysis will put additional demands on their time
- **Time:** a project leader will be required to co-ordinate and manage the process and working groups. Realistic deadlines must be monitored and met along with the team’s current day to day work loads

1.2) What Situations Are We Going To Analyse And How Are We Going To Collect The Data?

It is essential that the data is collected, analysed, discussed and reported in the order stated from a - f below. This is because it is a build-up of a total picture where one situation forms the basis for the next investigation.

- a) The external environment which impacts on our department / organisation
 - Geographical area and location
 - Type of operating conditions
 - Population density and distribution
- b) The current administrative structure
 - What areas do we currently provide services to?
 - Document current structure including roles, responsibilities, and authorisation procedures
- c) Current fleet
 - Tabulate the current vehicle fleet by vehicle type, if kept at different locations structure the report by location
 - Utilise form 6¹ for further breakdown
- d) Current policy regarding transport i.e. procedures, and operating guidelines
 - Collate and tabulate your findings, ensure you gather information from the teams that use the policies
 - Ask 4 questions:
 1. How are they communicated i.e. verbally, documented?
 2. Who communicates them?
 3. How broadly is their existence a) recognised; b) understood; c) implemented?
 4. How are they reviewed and updated?
 - Attach a copy of all documented procedures as part of the annex

¹ Forms referred to in this document are to be found in the Transaid TMS Manual

- e) Current transport management systems i.e. how the documents in place are used and revised
 - List the forms that are used. There should be reports and statistics in place to provide evidence of this
 - Place copies of the reports in the annex
- f) What can we afford?
 - What financial planning is done for the transport?
 - How much money is made available for transport management?
 - What is this calculation based on?
 - How is the budget distributed across locations?
 - How this relates to the running of transport (a) how much is actually spent? (b) how much is actually needed?
 - Can there be cut backs i.e. fleet, cost, heads, etc?

1.3) The Steps

1. Identify a project leader
2. Agree 'Terms of Reference' with the Senior Management Team and communicate the results to the working team
3. Prepare a management briefing for the senior management team
4. Undertake meetings with working groups and agree tasks and deadlines
5. Prepare communication for entire team explaining the situation and analysis process, which will be circulated following Senior Management endorsement
6. Follow this up with set team meetings to confirm understanding and ensure buy in from the team at all levels, particularly the most junior
7. Start data collection in agreed formats for analysis
8. Give structured feedback on comments and contributions explaining how their feedback has been utilised and where
9. Evaluate at set intervals to check progress, discuss and document findings
10. Collate and discuss findings with the working groups and analyse what the data tells you, i.e. strengths and weaknesses
11. Prepare draft situation analysis for presentation to the Senior Management
12. Incorporate comments from step 11 into second draft for the general circulation
13. Prepare and document final conclusions, agree with Senior Management and publish

2) A Systematic Approach To Policy Development

A general plan of action must be adopted in order to maintain a smooth running operation whilst ensuring high standards and a cost effective approach. There are twelve main area headings and all must be continuously developed by the team:

Operational Management

1. Operational Vehicle Planning
2. Ongoing Operation Controls
3. Roles and Responsibilities for Operational Management
4. Financial Management

Fleet Management

5. The Ideal Fleet, Replacement and Disposal
6. Specifications, Selection and Procurement
7. Planned Preventative Maintenance
8. Health & Safety

Human Resources

9. Organisational Structure
10. A Competent and Committed Workforce

Management Information

11. Monitoring and Assessment of Performance
12. Documentation

2.1) Why Have A Transport Policy?

If it is a written document in a simple language that takes the place of all previous documents / instructions and is accessible in a format that allows for easy reference then ignorance can no longer be an excuse for breaking these rules, and discipline can be fairly enforced.

2.2) Who Will Develop The Transport Policy?

We have learnt from Chapter 1 that we appreciate: Commitment, Access, Effort and Time. Team input, support and feedback are critical to success - and so it is the team that develops the policy.

The Policy Working Group

For this group to function effectively they must document their own approved 'Terms of Reference' it is recommended that they include the following:

- Group structure and chain of command
- Communication means within the group and beyond
- Details of how the group will operate
- Monitoring and review procedures

2.3) How Do We Go About Creating A Transport Policy?

The document that you are now reading cannot dictate your in-house transport policy; it can only provide guidance on how to develop them using a management technique known as "The Systematic Approach".

The steps following the Systematic Approach are:

1. What is the job to be done?
 - 'Development of a policy for Transport within 'xxxxxxx'
2. Define a detailed task instruction that should be a brief paragraph that states: why, how, who and when
3. Clarify the goal and the aims and define the 'Key Success Factors'
 - From the start there needs to be a clear goal and then set aims, that is to say: What for? Who for? And what will be the end product? This should be agreed and documented, for example it may be to improve services / performance, etc. These will be met by aiming to increase teamwork or promoting safe standards, etc
 - Key success factors will vary based on your requirements, for example they may be ensuring that all staff understand their roles and responsibilities, e.g. that deliveries arrive on time
4. Examine the relevant information
 - You will be able to source most of this information from the Situation Analysis
 - Policies and procedures should also be collected from other departments that affect your operation
 - Ensure that you cover the main twelve heading areas to maximise success
5. Define what has to be done? By whom? When?
 - The 'Terms of Reference' will be a key factor of this section
 - Utilise this section to identify where there are gaps in existing policies and how to fix them
 - What areas are duplicated, what areas are irrelevant?
 - How can you improve on the current procedures?
 - What are your 'Key Performance Indicators'?

- Remember maintain the cycle: reviewing □ planning □ doing □ monitoring □ improving
 - Produce a draft policy and ensure that any affected departments / teams are including in communication, it may be necessary to have a 'Policy Review Panel' to ensure 'buy in'
6. Review progress against 'Key Success Factors'
 7. Continue the process until the task is completed as defined

The full Transport Management System (TMS) contains a Chapter detailing a Sample Policy based on Chapters 1 & 2; it is designed to give guidance in real-life situations. For further information refer to the Transaid TMS.

3) Operational Management

3.1) Operational Vehicle Planning

Who is involved?

Vehicle planning is essential for the effective and cost efficient use of transport resources. It relies upon the cooperation and participation of every person who operates or uses vehicles, or who authorises vehicle operation or use. A sufficiently senior person must coordinate vehicle planning and will require two things (1) full support and confidence of his / her seniors; (2) a very detailed job description. We refer to this person as the 'Transport Officer'; it is a really important job! This person must be given the authority to implement the policy, and therefore has to be senior in the system otherwise they will not be listened to.

How is it done?

The following 3 step plan has been tried and tested and it is highly recommended that the transport policy ensures that it is followed.

The fact that work plans are not completely known at the time of planning is not an acceptable reason not to plan. It is easier to change a plan when circumstances change, rather than react to needs on a daily basis. Planning in advance also identifies potential problem areas in advance and allows appropriate actions to be taken.

Step 1

Five working days from the end of the current period, all managers and regular users of transport prepare their movement plans for the following period using the 'Period Movement Plan' - form 1.

This will enable the Transport Officer to plan and coordinate movements to best utilise transport resources.

An authorised 'Trip Authority' - form 2 must be issued for any movement not included in the 'Period Movement Plan' or movement that is outside the normal work station as far in advance as possible.

Step 2

The Transport Officer completes a 'Period Transport Schedule' - form 3 based on the information received in Step 2, taking into account any planned vehicle maintenance, service delivery requirements and levels of urgency.

This plan will change; the Transport Officer is responsible for keeping the schedule up to date and communication of the details.

Step 3

On the penultimate day of the working week, the Transport Officer prepares the 'Seven Day Transport Schedule' - form 4. This is based on the information received in Step 2 taking

forward any new 'Trip Authorities' and other necessary changes must be updated daily. The schedule must be displayed in the office as it will show all vehicle locations.

Whenever a vehicle is issued for a trip, the Transport Officer and the Vehicle Operator must complete the first part of the 'Vehicle Check Sheet' - form 5. On return the filed form must be completed and signed again.

This will ensure that responsibility for the vehicle is accepted and the condition of the vehicle and equipment is agreed when passed from one responsible person to another.

How is it monitored?

At the end of each period, the Transport Officer should review what actually happened with transport against what was planned. This should show successes, achievements, problems and failures. It will also be worth while to calculate the percentage of requests received versus those satisfied.

This information should be reported to Senior Management via the 'Period Transport Report' - form 12. By continuously applying processes and learning from the results, the department / organisation will achieve higher levels of service delivery performance.

Fuel Issue

Fuel can potential be a third of the entire transport budget and must be managed with strict clear processes to avoid misuse, errors and loss.

Generally it is preferable to make a contract with a local garage to supply fuel and employ a period credit check account arrangement. One source is easier to monitor than several, so long as it gives adequate cover in terms of time or location. In either case the fuel supplier must give supporting evidence of fuel supplied when it invoices; this information can then be cross checked against the 'Fuel Issue Vouchers' and 'Vehicle Log Sheets'.

Where fuel is stored and managed at site, thorough stock control procedures and healthy and safety issues must be observed.

3.2) Operational Controls

Wherever the local team is based there will be some issues specific only to their operation and the operating procedures will need to reflect this. One of the key areas of change from one operation to the next will be the organisational structure, roles and responsibilities.

It is the local management teams that are required to manage transport just as they manage other resources under their control.

The policy should include statements about all forms utilised and the person/s responsible, including use of the 'Vehicle Inventory' - form 6 and 'Vehicle Information Sheet' - form 7. It may feel like there is a lot of paperwork to complete when managing a fleet, if a form is listed here as necessary then the time taken to complete it now will save substantial time and resource later on. This has been proven repeatedly in all successful implementations of the TMS.

Vehicle Operator

Wherever you have vehicles based you will need a 'Vehicle Operator'. This will be the person that is employed as a professional driver and a person who rides in or drives a vehicle in order to carry out official duties.

Proper training must be given to everyone who can drive one of your vehicles, refer to the 'Vehicle Operator Record' - form 11.

The Vehicle Operator will be responsible for the following:

- The vehicle, including relevant documentation, keys, fuelling, security
- Health and safety

- Vehicle checks
- Policy responsibilities

3.3) Matrix Of Operational Management Tasks And Responsibilities

In order for everyone within the team to have a good understanding of the operational management and responsibilities, a matrix should be completed which defines the key responsibilities of the post holders at different levels.

The matrix will reveal four set levels of staff:

1. 'TO' - Transport Officer
2. 'TA' - Transport Assistant, this post will only be required for larger operations
3. 'TM' - Transport Manager, this is a senior post that may (depending on the size of the operation) be a dedicated manager
4. 'GM' - General Manager, this indicates operational management tasks for managers with no specific transport management brief

Transport must become a regular agenda item for management meetings as the Transport Officer will be able to discuss performance, issues and recommendations. This routine review is important as it gives opportunity for feedback on the transport operation. This level of communication will ensure that all affected departments understand the impacts they have on each other, which will in turn improve upon the operation.

4) Financial Management

4.1) The Transport Vision

In most contexts, the size of the fleet that can be run is defined by the amount of money available. Although cost of purchasing transport, the 'Initial Capital Cost', makes up a sizable portion of the budget of most bodies that provide public services, there are a number of other costs that are necessary to protect the investment. For transport these are:

- Depreciation - is the decline in value of a vehicle over time
- Fixed costs - that do not vary with level of activity i.e. vehicle insurance
- Variable costs - that relate to the utilisation of the vehicle including:
 - Running costs - directly related to the distance a vehicle travels i.e. fuel, tyres
 - Indirect costs - that do not affect the actual running costs i.e. breakdowns
- Human Resources costs - salaries, training

It is important that every department / organisation prepares an expenditure and income plan that estimates annual requirements over a period of time long enough to achieve a realistic view, e.g. between five and ten years.

There are three steps to the Transport Vision:

1. Look at the results from the 'Ideal Fleet Model'
2. Calculate estimated expenditure and income
3. Identify potential shortfalls to be covered by potential income

4.2) The Annual Budget

The annual budget for transport serves as an annual health-check for the Transport Vision and is used to monitor and update that plan. The people who set the budget must be responsible for on-going monitoring. That is to say that every reporting period they must analyse what has happened against what was intended to happen in financial terms. The 'Period Transport Report' - form 12, is a means used for this in a fully functioning transport management system.

Budget setting and monitoring becomes more manageable once it is logically delegated to appropriate management levels.

Where authority for budget management is delegated, the parameters must be clearly defined to avoid misunderstanding and errors.

The most effective means of budgeting for transport is using an 'All Inclusive Cost per Kilometre' figure. This enables the level at which a budget is being calculated to first consider the kilometres that it needs to travel to carry out activities, then multiply this figure by the All Inclusive Cost per Kilometre.

Paying for vehicles through an 'All Inclusive per Kilometre Charge' in conjunction with a 'Trading Account' (a bank account that income is paid into and bills are paid out of) is a very effective way of procuring transport resources.

5) Fleet Management

5.1) The Ideal Fleet, Replacement and Disposal

The first step in managing transport is to know what transport resources you have at the moment - the 'Current Fleet'. This may sound simple, but most departmental inventories and asset registers are out of date and do not give a current picture.

Irrespective of what you have, you must then carry out a 'Needs Analysis' of what resources you need in order to meet the service delivery objectives for your operation.

To do this you need to calculate your 'Ideal Fleet' following the steps below:

1. Complete the 'Vehicle Inventory' - form 6 ensuring that each vehicle has a completed 'Vehicle Information Sheet' - form 7
2. Gather information for the 'Needs Analysis'
 - a. What jobs require transport support?
 - b. What are the transport requirements for that job?
 - c. What are the vehicle operating conditions for that job?
 - d. What are the service delivery priorities?
3. Complete a table showing by vehicle type the number of days it will be needed per month, use a safety factor of approx. 20% for vehicle downtime
4. Calculate the number of vehicles required by 'Vehicle days required by each vehicle type' divided by 'Number of working days in a month (20)'
5. Now that you have the information you can work out if you
 - a. Have more vehicles than the 'Ideal Fleet Model'
 - b. Have fewer vehicles than the 'Ideal Fleet Model'

This information should be gathered through an interview and the number of vehicles required should be calculated in terms of days needed

You can take the appropriate action taking into account the plans for growth, with the confidence that this is the right action to be taken for the operations success

Replacement of Vehicles

The overall vehicle replacement plan reviews the Current Fleet against the Ideal Fleet, and vehicle replacement needs for the next five years are determined.

The most effective way to calculate the point at which a vehicle should be replaced is by graphing the 'Depreciation cost per km' against the 'Running cost per km' based on the 'All inclusive cost per km over distance'. The graph will clearly show the point where the Running Costs gradually rise to meet the falling Depreciation and when the All Inclusive Costs per Km is at its lowest point.

If you are just starting out with your Transport Management System and have no fleet running cost data to base your estimates upon, professional advice may be sought through Transaid.

Disposal of Vehicles

Disposal procedures need to be established to deal with transport equipment when it is at the end of its useful life. Formal mechanisms are required to examine and write-off equipment and then to ensure that it is safely and promptly disposed of, to avoid needless retention and storage of redundant material.

5.2) Specification, Selection and Procurement

There are three stages in the vehicle specification and selection process:

1. Operational - what equipment is required and what is the working environment
2. Technical - what specific engineering and performance will be needed from the vehicle in order to satisfy the operating requirement
3. Selection - considering points 1 and 2 and cost

Specific to motorcycles:

Transaid strongly recommend that motorcycles should not be introduced into a department / organisation without taking advice, unless the department / organisation is already very experienced in running a safe (no crashes) and cost effective motorcycle fleet in a managed system (no breakdowns). With an appropriate make and model of a motorcycle, plus thorough training of all riders, motorcycles will be a major asset. Without appropriate training they will be expensive and dangerous.

5.3) Planned Preventative Maintenance

It is the most important factor in achieving appropriate levels of vehicle availability and safety. Without this it will lead to increased failure rates and downtime and maintenance costs will increase, which will in turn affect the operations performance.

The basic points to remember when dealing with maintenance is the strict observation of Planned Preventative Maintenance which involves the following:

1. Vehicle operator training
2. Vehicle operators daily defect reports
3. Vehicle inspection - carried out daily on or off site
4. Vehicle servicing - at pre-determined intervals usually in accordance with the vehicle manufacturers recommendations but taking into account any local conditions that may demand more frequent servicing
5. Rectification of defects - carried out on or off site

Maintenance Options

There are three main options;

1. 'In house maintenance' - performed using the facilities and staff of the department / organisation
2. 'Outsourced maintenance' - under taken by an outside contractor
3. 'Contract hire' - undertaken by an outside contractor as part of a vehicle operating system

It will be necessary to review the operational requirements and match the most suitable form of maintenance to the individual operation

Whichever mix is selected, it must be preventative and must be under control of a competent manager; if it is not, the standard of the vehicles will quickly decline and running costs will increase.

Maintenance Planning

Whichever maintenance options are followed, vehicle maintenance schedules must be drawn up together with, and published by the Transport Officer as part of the vehicle planning.

All members of the management team must make a commitment to respecting the scheduled dates for maintenance.

A master vehicle inspection and servicing schedule should be drawn up for one year - a wall chart is recommended. This chart can also be used to show road tax renewal, annual inspection dates, etc.

Vehicle servicing is a compromise between inadequate attention, resulting in progressive deterioration in condition and the ensuing serious consequences, and too much attention, which is costly and unnecessary.

The person responsible for the condition of the vehicles must decide the scope of the servicing work required and how often this should be carried out; taking into account the manufacturer's guidelines and kilometres travelled in which type of environment.

Maintenance Documentation

Vehicle Maintenance Summary:

Whoever maintains the vehicles must make a detailed written Servicing Record Report, listing the work done, parts and fluids used and costs incurred on each job. The Transport Officer must keep this on the individual vehicle file and transfer the summary information onto the 'Vehicle Maintenance Summary' - form 8, this information will also be utilised on the 'Period Transport Report' - form 12.

Workshop Job Cards:

When the written order is received, the workshop raises a workshop 'job card' for each vehicle entering for Inspection, Service and / or defect rectification. Work should not be carried out without a job card; also each card should include the following information:

- Details of all work required to be carried out
- Actual work carried out
- Name of staff and hours worked
- Details of spare parts and materials used
- Space for the cost of the work

Once all relevant information has been taken from the job cards they should then be filed with the vehicle files, with form 8 at the front of each file.

6) Health & Safety

6.1) What a Health & Safety Policy Document Should Include

The Health & Safety Policy Statement and any procedures documents should make clear:

- The department / organisation and legal requirements
- Legal responsibilities
- The person responsible for providing specific Health & Safety guidance
- Risk assessments - responsible person
- Training arrangements
- Accident reporting and investigations - responsible person
- Review dates of policies and procedures
- How the department / organisations systems meet legal requirements and implications if they do not

The health and safety manual or procedure documents must have clear information covering all required areas.

The key to successful observance of health and safety is the development of a departmental / organisational culture of awareness of, and compliance with, the health and safety issues. To ensure that this is possible; the Health & Safety Policy Document must be practical and be incorporated within day to day tasks.

For example:

- Clear environments around work stations

- Completed risk assessments and action taken where risks are highlighted, i.e. warning tape on raised flooring
- Inductions
- Practice drills for fire evacuation

6.2) Health & Safety Specifics In Transport Management

There are five areas specific to transport management where local health and safety procedures will probably need to be agreed and documented by the transport technical staff:

1. Fuel stores
2. Safe operation of vehicles
3. Accident and incident procedures for vehicles
4. Vehicle workshops
5. Security of vehicle assets

6.3) Insurance and Transport Management

Careful consideration should be given to the form of insurance selected for the vehicles belonging to the department / organisation. The minimum requirements of the law must always be complied with; this is usually at least third party cover.

To ensure compliance with the vehicle insurance requirements, all personnel using operation vehicles under the responsibility of the department / organisation must be fully conversant with accident and incident reporting procedures for vehicles and personal injury.

7) Human Resources

7.1) Organisational Structure

There are many variable factors that contribute to the right human resources structure for the transport management, the main ones are:

- The size and structure of the department/organisation
- The size of the vehicle fleet
- The maintenance arrangements for the vehicle fleet

Effective transport management requires a clearly defined organisational structure within a well managed organisation. To ensure that the structure is clear, job specification and job descriptions will be required, they will form the basis for a sound job interview plan and successful recruitment.

7.2) Competent, Committed Workforce

Careful planning and a detailed recruitment and selection process will go a long way towards guaranteeing the appointment of the necessary qualified staff to the posts that need them. Once the right people have been hired, it is imperative to do all that is possible to retain them and the expertise that they gain during their employment.

Staff Reviews

The aim of a staff review meeting is to have an honest and open discussion in a relaxed atmosphere, free from distractions and disturbances. An effective staff review must have three clearly understood and agreed goals:

1. Organisational - performance levels, placement, promotion and pay
2. Feedback and evaluation
3. Coaching and development

It is critical that the manager holding the reviews prepares beforehand to ensure that the meeting is utilised correctly, as a review inadequately done is a waste of time.

Vehicle Operator Assessment

The vehicle operator assessment is needed to assess the standard of competence reached by a vehicle operator, and to identify training required. It is a way to ensure that vehicle operators operate vehicles to an acceptable standard and in a safe and competent manner, and should be done as a separate process to the staff review.

The following areas should be covered in the assessment and recorded on form 11:

- Driving assessment - this should be carried out annually
- Levels of accident damage or violations of traffic law
- Operational requirements - administration, vehicle checks

Training & Development

Proper support and development increases capability and effectiveness in meeting both personal and departmental / organisational goals. The continuous development of staff is one of the key responsibilities of a manager but the manager and the staff share this responsibility.

There are a number of ways in which to carry out training and development: on the job, external / internal courses, all of which serve a purpose if they match the individual and operational requirements

8) Monitoring and Assessment of Performance

8.1) Transport Management Information - Just Paper or the Heart of the System?

Transport management information is not there to increase the level of work, but to better direct the effort. With a clearly defined management information system - knowing what information will be collected when, by whom, and how it will be analysed, used and communicated, that is ideally in place before vehicles are put to work in the field - effort may be focused on the quality of the information and putting it to work for everyone in the department/organisation.

8.2) Seven Key Performance Indicators (KPIs)

The KPIs are:

1. Kilometres travelled - from the 'Vehicle Log Sheet'
2. Fuel utilisation - from the 'Vehicle Log Sheet' cross checked with the 'Fuel Issue Vouchers'
3. Running costs per kilometre - from the 'Vehicle Maintenance Summary' - Form 8
4. Availability - from the 'Vehicle Log Sheet' and the 'Period Transport Schedule' - Form 3
5. Utilisation - once the vehicle availability has been confirmed, utilisation is calculated using availability information, compared with information on the 'Vehicle Log Sheet'
6. Needs satisfaction - to calculate this take the: 'number of official vehicle requests for vehicles satisfied (number of trips made)' divided by 'number of trip requests for official work received' x 100. This information is from the 'Period Movement Plan' - Form 1, 'Trip Authorities' - Form 2, compared with the 'Period Transport Schedule' - Form 3
7. Safety record - from the 'Accident / Incident Report' - Form 9 and the 'Accident / Incident Follow Up Report' - Form 10

These should also be recorded on the 'Period Transport Report' - Form 12. Targets for each of the seven KPIs should be set to encourage the team to aim higher.

It is important that all of the people involved in filling out the reports are able to see the results, as well as highlighting poor performance. Staff should be rewarded for outstanding performance.

26th August 2008 Revision