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Delivery and Servicing Plan Guidelines

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1 INTRODUCTION

1.1 TRAILBLAZER

The TRAILBLAZER project (**T**ransport and **I**nnovation **L**ogistics **b**y **L**ocal **A**uthorities with a **Z**est for **E**fficiency and **R**ealisation) has achieved a reduction in energy used in urban freight transport through public sector policy interventions across Europe by showcasing good practices and promoting Delivery and Servicing Plans (DSPs). DSPs are key strategy documents outlining how an organisation will deal with its need to generate freight transport efficiently, safely and in a sustainable way. The TRAILBLAZER project was awarded funding by Intelligent Energy Europe to:

- Reduce energy used in the supply chain
- Reduce transport related emissions
- Reduce vehicle movements

The TRAILBLAZER consortium comprised local authorities, private sector industry leaders and communications experts. The group of experienced organisations (TRAILBLAZERS), transferred knowledge and experience to a group of less experienced authorities (PATHFINDERS).

The specific objectives of TRAILBLAZER were:

1. Implement the actions contained in the DSPs produced by the four PATHFINDER cities.
2. Evidence reduced energy use as a result of DSPs.
3. Transfer knowledge and exchange experience between experienced and less experienced organisations.
4. Promote best practice in freight energy efficiency amongst local and regional authorities and the private sector in Europe.

These Delivery and Servicing Plan Guidelines are one of the TRAILBLAZER project deliverables (D6.3). It is publically available on the TRAILBLAZER website (www.trailblazer.eu).

1.2 Delivery and Servicing Plan Guidelines

The DSP Guidelines build on two documents produced as part of the TRAILBLAZER project. These are the DSP Toolkit (D4.3) and the Lessons Learned Report (D4.4). These documents are both available on the TRAILBLAZER website.

The DSP Toolkit provides a generic framework for creating a Delivery and Servicing Plan. It builds on the knowledge of the TRAILBLAZERS; the 'State of the Art' report and the good practice case studies identified in work package 2 (D2.3, O2.1 and O2.2); and the experiences of the PATHFINDERS as they develop their own DSPs. The toolkit goes beyond the good practice that already exists in the Transport for London (TfL) and Swedish Road Authority (SRA) examples with the key points being enhanced to make them applicable across Europe.

This Lessons Learned Report is based on the work carried out by the PATHFINDERS to develop and implement their DSPs. The main body of the report is split into two reflecting the



D6.3 Delivery and Servicing Plan Guidelines

types of DSP that were implemented. The first part covering individual organisational DSPs, the second covering geographical area-wide DSPs. As well as setting out the lessons learned the report also includes policy recommendations for integrating Delivery and Servicing Plans into European, national, regional and local frameworks.

These guidelines are a simplified synthesis of the toolkit and the lessons learned report and provide an initial introduction to implementing your own DSP and to aid learning from the experiences of the PATHFINDERS, now turned TRAILBLAZERS. Section two contains information on implementing DSPs and section three sets out the main learning points.



2 BACKGROUND TO DELIVERY AND SERVICING PLANS

Delivery and Servicing Plans (DSPs) are key strategy documents outlining how a public or private sector organisation deals with its need to generate freight transport efficiently, safely and in a sustainable way. A DSP focuses on a wide range of activities that support an organisation including:

- Goods deliveries
- Goods collections
- Waste and recycling
- Servicing activities e.g. office maintenance, window cleaning etc.

DSPs are specifically aimed at actively increasing the efficiency of the freight transport systems in urban areas. An **organisational DSP** provides the opportunity to manage goods and commercial vehicle activity to and from both proposed developments and existing operating sites. It is a starting point for freight management, which directs the implementation of measures and initiatives aimed at reducing, retiming rerouting and remodelling deliveries. It provides an opportunity to redefine building operations and ensuring procurement activity also accounts for vehicle movement and emissions. A DSP has an organic impact on reducing CO₂ emissions, congestion and improving air quality. It is effectively a Travel Plan for freight.

One of the strengths of the Delivery and Servicing Plan (DSP) concept is that it can be applied in varying scales and scopes. At one end of the spectrum a DSP can be created for a single small organisation, at the other end a DSP can be created for a discrete geographical area of mixed use i.e. an **area-wide DSP**. The area chosen may also have specific issues affecting freight, delivery and servicing activity e.g. preserving the fabric of a historic city centre, poor air quality, modal conflicts e.g. trams, cycle lanes etc. An Area-wide DSP will have greater complexity than smaller scale DSPs, which reflect the defining characteristics of the location.

A DSP consists of a range of tools, actions and interventions, including the promotion of specific solutions for urban logistics. Further details of these measures and their applicability to different situations can be found in the Transferability Analysis (O4.2) which can be found on the TRAILBLAZER website. A DSP can be tailored to allow a municipality or an adopting site to pick and mix various measures that will produce the best results within the resources available for the organisation/town centre.

Finally, a DSP should include an Action Plan which is updated continually throughout the lifetime of the DSP as the DSP tools are implemented and change is achieved.

An organisation will secure the benefits from implementing a DSP by addressing and reviewing their organisational policies. The value of a successful DSP is set in the aim to organically link the internal sustainable changes adopted within an organisation with the delivery, collection activities and servicing practices of its suppliers, contractors, goods and services providers.



2.1 Benefits of Delivery and Servicing Plans

Delivery and Servicing Plans (DSPs) can be implemented by an organisation for a wide variety of reasons e.g. environmental – to improve air quality, economic – to reduce costs, or societal – to be a better neighbour and meet corporate social responsibility objectives. Implementing a DSP can have multi-faceted benefits for a variety of stakeholders. These include municipalities – both organisationally and in meeting their public service obligations, businesses, delivery and servicing companies, and residents and visitors in an area. A selection of these is set out below.

Benefits to municipalities implementing a DSP

- Reduced congestion due to fewer deliveries and reduced servicing activity
- Improved air quality with reductions in pollution and CO₂ generation
- Reduced noise, vibration and nuisance generated by freight movements
- Lower risk of accidents involving freight vehicles.

Benefits to businesses adopting a DSP

- Cost savings and operational efficiency improvements from reviewing internal procurement practices and through contract negotiation with suppliers
- Increased reliability of deliveries due to improved area accessibility and reduced congestion on the road network
- Deliveries, waste and servicing carried out outside peak hour times
- Staff time savings due to fewer deliveries at known times
- An improved working environment around the organisation's premises due to reduced vehicle movements
- Reduced health and safety hazards and casualties/accidents due to reduced vehicle movements
- Efficient assistance regarding their Corporate Social Responsibility (CSR) Policy e.g. fulfil their commitment to reduce CO₂ emissions and meet other CSR goals.

Benefits to Freight, Delivery and Servicing Companies

- Fuel savings from fewer and quicker delivery trips
- Increased reliability over delivery times
- Increased driver and vehicle productivity
- Fewer trip hazards due to not having to park illegally or in an unsafe location to unload
- Reduction in the Penalty Charge Notices (PCNs) issued to the company
- Reduced environmental impact

Benefits to residents and visitors

- An improved urban environment and enhanced quality of life
- Fewer accidents due to fewer journeys
- Increased compliance with parking, loading and unloading policies and legislation.



2.2 Information Gathering

An adequate data baseline for a DSP can be established through an internal and external process of data gathering relating to the existing operational systems, procurement practices, tender processes and deliveries and servicing activities presently being carried out at the organisations premises or by organisations included in an area-wide DSP. This exercise will ensure that when the data gathering commence, the tools and templates used to record the information are appropriate and that the internal functions within the organisation are transparent and will allow the data to be recorded correctly.

Delivery and Servicing Survey

Every DSP should start with a survey of the delivery and servicing activity occurring at the DSP site. If a DSP is to cover a number of buildings, the survey should take place at all the buildings over the same period of time and within the same timeframe. The survey should aim to record all the delivery and servicing vehicle movements to and from the observation site. Thus the data gathered is fed to the DSP Co-ordinator who ensures that the data is effectively collated and analysed. To provide a complete picture of the freight movements taking place at the surveyed site, maps and premises' plans may also be useful to identify:

Servicing survey

In general, every site requires regular servicing of the equipment kept on-site such as lifts, electrical equipment, heating, IT systems, etc. Sometimes these activities may be carried out in individual departments or parts of the building independent of one another and with no co-ordination. Such instances can create situations when two or more servicing activities take place in the same time at the same building, limiting the available parking provision at a site or creating local congestion. In order to identify the frequency and the duration of the servicing activities taking place at the various buildings belonging to an organisation, it is recommended that an internal servicing survey to be initiated which will include any regular and ad hoc servicing such as lift maintenance, plumbing, electrics and Cash In Transit collections, etc.

Site/premises assessment

Developing and implementing a DSP involves understanding the internal working practices and organisational and sustainable policies that an organisation has in place. Therefore, it is beneficial to involve staff from all relevant departments, such as key staff from the facilities management and the policy department, to determine the factors that influence the frequency, the demand and the location of the majority of the deliveries, collections and servicing at the site.

Data analysis

The process of analysing the data should start once all the data regarding the delivery, collection and servicing trips has been collected. The results of the qualitative and quantitative data analysis will drive and design the development of the DSP measures and targets. The data analysis used as a DSP baseline should be extensive, including all the details of the delivery and servicing survey, the internal servicing and premises assessment. Other sections should be allocated to the existing sustainable policies and procurement practices.



2.3 Target Setting

Identification of key delivery and servicing trends

The data analysis should enable the organisation to evaluate and identify a number of activities where implementation of changes will generate immediate and long term results and benefits, with little or no cost. Targeting the activities that involve the highest level of vehicle movements in/out of the site, is the foremost aspect to consider when identifying priority areas of improvement and setting targets for the DSP. Examples of other aspects to identify and take into account when developing and setting targets for the DSP are:

- Which activities generate high vehicle activity at peak times?
- What can be changed and implemented whilst incurring the least expense, to the organisation?
- Which non-essential activities that can be reduced or eliminated altogether?

Measurable targets

To effectively drive the DSP forward, the organisation should set short, medium and long term targets. This is crucial for focusing the organisation to ensure that efficient changes are made to existing practices. The targets need to be SMART – specific, measurable, achievable, relevant and timely, to enable the DSP to be successfully delivered.

Setting targets

The process of setting targets is dependent on the findings of the initial baseline data gathered. The baseline data may allow quantifying/measuring the number of deliveries, collections and servicing activities taking place at the site as well as the name of the various consignors. In relation with the key findings from the initial data collection, the DSP could be structured as a framework establishing one DSP main target, complemented by a series of sub-targets.

In this case, setting the target, means identifying a date by which the above actions should have reduced the number of stationery deliveries and agreeing a date to begin the monitoring /evaluating the deliveries/collections and servicing taking place at the site, after the measure has been successfully implemented.

As part of the DSP implementation process, the organisation has to decide how the monitoring/evaluation process will be completed. The monitoring process can involve both a site observation survey, similar to the data gathering process used for establishing the DSP baseline or an internal assessing process measuring the actual number of supplies used. However, the DSP targets monitoring and data gathering has to be consistent throughout the stages of the DSP's development, implementation and evaluation.

Evaluating the set targets is very important as it allows the organisation to assess how much progress has been made in addressing the issues that prompted, and were identified in the early stages of the DSP.

To ensure that the DSP targets are met and are adequately integrated in the organisation's procedures, staff from the procurement and sustainable departments should be involved in establishing the targets. The procurement team will provide valuable negotiation power with the organisations suppliers and contractors in delivering the targets, while the policy staff will ensure that the DSP is compliant with the other policies and strategies currently in place.



2.4 Who Needs to be Involved?

To implement a DSP, it is necessary to create a DSP working structure; the organisational structure that will steer and co-ordinate the delivery of the DSP. The greater the number of key players that are involved in a DSP, the more complex the structure and management mechanism gets, but the more likely the DSP will become established and embedded into the organisations processes and procedures.

The DSP will involve at least one core staff member who will play the key role of co-ordinating, steering and monitoring the DSP. This key role will be allocated to the DSP Co-ordinator.

The DSP will also include other key staff from the organisation implementing the DSP as well as potentially key suppliers and contractors. They will bring a valuable input to the DSP based on their specialised knowledge and their working experience. An indication of the specialised roles, staff and suppliers that could be involved in the DSP might be:

- DSP Champion: A senior manager who is responsible for the all the functions of the DSP.
- DSP Co-ordinator: The person that will have the “know how” and knowledge and expertise to enable the DSP to be effectively implemented.
- DSP Working Group/ Steering Group: To bring together staff from different departments that will support the DSP development and implementation.
- Facilities Manager: Has a key role in the success of the DSP.
- Procurement staff: Procurement is the precursor of the deliveries and servicing that is being managed through the DSP.
- Marketing and communications: To communicate and engage with all the organisations employees to achieve the objectives and benefits of the DSP.
- Staff responsible for environmental improvements and policies
- Key suppliers and contractors: To assist with gathering the data for the DSP baseline, to identify improvements in the current operations and to advise how the new arrangements can be adopted efficiently with minimum disruption and costs.



2.5 Delivery And Servicing Plan Measures

This section sets out potential measures that could be contained in the DSP. These measures fall into two categories 1) Those relating to procurement and 2) those relating to operational efficiency. Once the DSP Co-ordinator has presented the results of the delivery and servicing data analysis to the DSP working group the next stage on the DSP development process is to decide which measures will be included in the DSP. These measures and an indication where they could be applicable are described below.

Procurement

There are two key points that need to be recognised when developing a DSP if the organisations procurement power is to be used to secure a sustainable and competitive advantage. The first is that procurement should be used as a strategic tool to further the aims and objectives of an organisation and not just regarded and operate as an administrative process. The second is that employees are unaware of the transport implications of their purchasing. A successful DSP will educate employees and ensure that transport, and hence energy use becomes a consideration when an organisation procures goods or services.

Potential actions for the procurement team include:

- Reduced number of suppliers
- Increased use of local suppliers
- Consolidating Suppliers
- Centralised online ordering system
- Joint Procurement

Operational Efficiency

These are measures that implemented will achieve potential cost savings and great efficiency in the operations undertaken at an organisation's site. Examples of these include:

- Managing deliveries by implementing an online delivery system
- Out of hours deliveries and servicing
- Road Trip Efficiency
- Waste Management
- Design Factors to Take into Account
- Use of responsible operators
- Use of sustainable modes of transport
- Legal Loading



2.6 DSP Monitoring

Monitoring the DSP measures is a process that involves regular data collections, data analysis and evaluation of the progress towards meeting the DSP targets.

Data collection and Evaluation

Collecting new data for the targets evaluation will follow a similar pattern to the baseline data collection survey, carried out at the initiation of the DSP. At this stage the same templates and questionnaires or more targeted data collection materials can be used. Ongoing data collection will enable comparison with the initial data collected for the DSP baseline and enable assessment of the progress made towards each of the targets.

To ensure the success and the implementation of the DSP measures, ongoing data collection needs to be carried out on a timely basis e.g. monthly, half-yearly or on annual basis, depending on the DSP. However, some targets might require monitoring more often than others. In this case the target monitoring process can be tailored for each specific site.

Monitoring

Developing a DSP Evaluation Template which can be updated as regularly as required is a useful monitoring tool that will help control and present the DSP monitoring procedure. The template will facilitate tracking the targets and measures progress, highlighting trends and weak areas. It will also help with presenting the DSP progress results in a consistent way. It can be used to communicate and engage key staff in the DSP implementation and focus their efforts for specific improvements.

The quantitative targets should be analysed and presented to the DSP Working Group in the form of tables, graphs which statistically illustrate progress towards the target to date. Significant or critical dates of when certain strategies were implemented and completed within the municipality should be noted. If all the targets have been successfully achieved and exceeded, the targets themselves need to be re assessed with higher goals and challenges.

It is possible that the evaluation process identifies if the set targets have not been met or if less progress has been made towards achieving them. In this case, it is important to identify what went wrong and determine why the results are not positive. It can be beneficial to re – assess the potential causes that lead to the lack progress such as:

- Has everyone involved in the DSP implementation stage understood their tasks?
- Have the timescales allocated to making changes and monitoring the DSP targets have been appropriate? Does everyone understand the importance of the DSP?
- Have the communication channels between the DSP Co-ordinator and the staff involved in the DSP implementation process been working effectively?
- Have sufficient resources been allocated to the implementation of the DSP's measures?
- Have targets and priorities been wrongly set?
- Are the suppliers and delivery operators unwilling to co-operate in the DSP Implementation?

Once the factors that lead to the lack of progress towards achieving the targets set in the DSP have been identified, efforts to overcome the impediments need to be undertaken.



2.7 Area-Wide DSPs

One of the strengths of the Delivery and Servicing Plan (DSP) concept is that it can be applied in varying scales and scopes. At one end of the spectrum a DSP can be created for a single small organisation, at the other end a DSP can be created for a discrete geographical area of mixed use i.e. an Area-wide DSP. The area chosen may also have specific issues affecting freight, delivery and servicing activity e.g. preserving the fabric of a historic city centre, poor air quality, modal conflicts e.g. trams, cycle lanes etc. An Area-wide DSP will have greater complexity than smaller scale DSPs, which reflect the defining characteristics of the location.

An Area-wide DSP will cover a wide range of organisations. These may include offices, retail – chain and independent, hotels, restaurants, service providers, residential etc. The mix of these activities will vary with each area, and so therefore will the DSP measures to be implemented.

The DSP toolkit sets out a proposed methodology for the development of an Area-wide DSP which consists of a series of eight linked tasks. These are set out below:

1. Sample Selection
2. Consultation
3. DSP Task Force (1)
4. DSP area delivery map
5. Drafting of Area-wide Delivery & Servicing Plan
6. DSP Task Force (2)
7. Procurement workshop
8. Development of Preferred supplier list (Area-Wide)
9. Communication and Publicity

It is intended that these tasks provide a framework for an organisation to develop an Area-wide DSP. The location could be of varying scale, the key consideration being that it needs to be of a size that is manageable and able to support a DSP. Clearly, the larger the area the greater the scope for securing benefits for its businesses. However if the area chosen is too large it may not be possible to develop a workable DSP.



2.8 Reviewing DSPs

One reason for the production of a DSP may be to meet the statutory or discretionary requirements of an external body e.g. a municipality or a landlord. Once the DSP has been produced by any public or private sector organisation there will then be a requirement for the DSP to be reviewed by the external body to ensure that it meets their requirements. To assist with this task a DSP review framework has been created.

The framework contains seven review categories for the DSP to be measured against. The categories are:

1. The Delivery and Servicing Plan (DSP)
2. Reducing delivery, servicing and collection frequencies
3. Identify and promote where safe and legal loading can take place
4. Using freight operators who can demonstrate their commitment to best practice
5. Health and Safety
6. Ongoing Activity
7. Municipality Requirements

For each of the seven review categories there are a series of related questions to tease out if the DSP meets the requirements of the reviewing organisation.



3 LESSONS LEARNED

This section is based on the work carried out by the PATHFINDERS to develop and implement their DSPs. The section is split into two reflecting the types of DSP that were implemented. The first part covering individual organisational DSPs, the second covering geographical area-wide DSPs.

3.1 Organisational DSP Lessons Learned

- A successful implementation requires that all the various parties affected by the change have knowledge and a positive attitude. It is essential that dialogue is kept open between the parties. Solutions must be based on essential needs and accepted by users.
- The high economic and environmental impacts of this measure increase the importance of committed political support. The experiences revealed that a strong political direction, at the beginning and during the project, will improve the project outcomes.
- This kind of measure is more successful if it is part of a wider strategy to change employee behaviour in the purchasing and delivery process.
- A combination of the consolidation and coordination of deliveries with the implementation of the e-purchase system is a step-change in the municipality supply chain. This was especially true in Växjö.
- The experience of both municipalities demonstrates that by gaining control and coordinating deliveries via legal contracts environmental considerations which decrease emissions and fuel use can be included within the contract and be legally enforced.
- The environmental culture at the municipality and country level contributes to the successful implementation of this type of measure.
- This type of measure is suitable for cities having good knowledge of freight activity and delivery processes, and where there is open dialog between the stakeholders involved and a high level of political support.

3.2 Area-wide DSP Lessons Learned

- This is a restrictive action for freight vehicles. It is important to take into account as much as possible the opinions of those who are directly or indirectly affected by the measures e.g. drivers, freight operators, shop keepers, citizens etc. The experiences revealed in Zagreb and Vercelli that the communication with the principal actors can improve the understanding and the cooperation between them and the public administration.
- Political support was very important factor for the achievement of objectives of this kind of measure in Zagreb and Vercelli. There should be a two-way dialogue between politicians and staff implementing the DSP.



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- The experience in Zagreb has demonstrated that the improvement of freight transport is difficult without improvements in public and private transport. It is necessary to include this measure into the overall organisation of transport in both the target area and city-wide.
- It was concluded that this type of measure can be suitable for the cities that have similar issues within their urban area. The combination of parking management with new technology e.g. camera control, contributes to the achievement of the project objectives.

Further details of the specific lessons learned by each PATHFINDER are set out in the Lessons Learned report which can be found on the TRAILBLAZER website.