Delivery & Servicing Plans Toolkit

The DSP Toolkit provides a generic framework for creating a Delivery and Servicing Plan for European public and private sector organisations
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Delivery and Servicing Plan Toolkit
Final Report

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1.1 TRAILBLAZER

The TRAILBLAZER project (Transport and Innovation Logistics by Local Authorities with a Zest for Efficiency and Realisation) 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 are:

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.

TRAILBLAZER evaluated both the impacts of the measures implemented during the project, and the processes involved in planning and implementation (D5.3 Final Evaluation Report). Specific attention was given to the impact of DSPs and the impact of the TRAILBLAZER project on energy saving.

This Delivery and Servicing Plan Toolkit is one of the TRAILBLAZER project deliverables (D4.3). It is publically available on the TRAILBLAZER website (www.trailblazer.eu).
1.2 DELIVERY AND SERVICING PLAN TOOLKIT

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 is the final version of the DSP toolkit. It should be noted that the structure and the contents have been updated as the project progressed.

The outline structure of the toolkit is set out below:

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The DSP toolkit was used within the project to assist with the transfer and dissemination of knowledge about DSPs from the TRAILBLAZERS to the PATHFINDERS and the wider TRAILBLAZER User Group and Assimilators Group consisting of European urban logistics practitioners. The toolkit provides a generic guidance and framework for European public and private sector organisations to develop their own DSP. They will be able to follow the steps outlined in the toolkit and tailor the DSP to meet their own specific requirements.

In the toolkit the key points relating to DSPs are set out and illustrated by case studies. Examples of survey templates and questionnaires are provided in the annexes to assist with DSP development.
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. A 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.

The DSP concept is scalable, so DSPs can be developed for a variety of levels. The scope of a DSP differs depending on the specific size of the organisation, on how many tenants or buildings are involved or on how many DSP measures are adopted. The scope of a DSP could be for:

- One building with sole occupancy
- One organisation occupying part of a building of multiple tenants e.g. a single office in a multiple use premise
- One building with multiple tenants e.g. Railway Station, Shopping Centre
- Across a number of buildings, with different tenants, but covered by the same landlord or facility Management Company
- A number of buildings, under the umbrella of an organisation who is not necessarily the landlord, e.g. a Municipality
- A self-contained geographical area.
A DSP can consist of a range of tools, actions and interventions, including the promotion of specific solutions for urban logistics such as:

- Consolidation centres
- New methods of purchasing transport and goods
- Looking at where safe and legal loading can take place
- Using freight operators who can demonstrate their commitment to best practice
- Using more sustainable delivery methods - cycles rather than vans, for example, or requesting that your suppliers use electric vehicles.

In the United Kingdom, the adoption of Freight Travel Plans is already allowed for within the National Policy Guidance, for example within Planning Policy Guidance Note 13 (PPG13) which refers to “more environmentally friendly delivery and freight movements”¹ in the context of delivering sustainable transport objectives.

Furthermore, the TfL publication ‘Guidance for Workplace Travel Planning for Development’ (2008), states that ‘All travel plans should include a provision for the development of Delivery and Servicing Plans, which incorporate a legal loading plan and where necessary, a Construction Logistics Plan to manage movements associated with a development’s construction phase’².

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. This will be achieved by involving staff from the procurement and sustainable policy departments in the development of the DSP.

The DSP can be incorporated in the organisations environmental policies or its travel plan and regarded as steps taken towards achieving its environmental commitments, to be more efficient and enhance the local residents’ quality of life. To integrate the benefits of a DSP with the organisations other environmental and sustainable policies and actions, employees from the policy and sustainability department need to be involved in the early stages of development of the DSP.

The DSPs’ environmental benefits could be also achieved with pressure from top to bottom e.g. from a municipality to its suppliers of goods, services and contractors. The purchasing organisation can communicate its DSP objectives to all its suppliers, service and goods providers, thus securing a good working relationship with them. This enables the persuasive power of an organisation’s procurement team, to consolidate deliveries and ensure suppliers’ contribution to the DSP can be a valuable asset.

An organisation will secure the benefits from implementing a DSP by addressing and reviewing their organisational policies. Typically this would commence with their procurement policies and processes by viewing procurement as a strategic tool to be used by an organisation, rather than just a financial processing function. Through negotiation of sustainable contract agreements with
its suppliers, an organisation will achieve and embed change within their organisation, adopt greater environmental management of their facilities and take control over vehicle movements relating to delivery and servicing activity.

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.


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.

The main objectives of a DSP are to reduce the number of delivery, collection and servicing trips or to mitigate their impact e.g. by retiming activities outside of peak times or promoting safe and legal loading.

Implementing a DSP can have multi-facet 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.

Both immediate and long term improvements and benefits can be realised by organisations through improvements to operations and practices that increase their operational efficiency. These are set out below.

### 3.1 Benefits to municipalities implementing a DSP

There are two ways that the benefits of a DSP can accrue to municipalities. The first way is as an organisation in their own right. These benefits are set out in section 3.2.

The second way that municipalities gain the benefits of implementing a DSP is through the implementation of their statutory or discretionary public policies. The identified benefits for municipalities achieved by developing and implementing a DSP in furtherance of their public policies are:

- An improved urban environment and enhanced quality of life for residents
- Reduced congestion due to fewer deliveries, collections 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
- Less damage to the highways infrastructure due to reduced or more appropriate use by vehicles
- Increased compliance with parking, loading and unloading policies and legislation.
3.2 Benefits to organisations adopting a DSP

The aim for an organisation when developing its own DSP, either on its own or as part of an area wide DSP, is to educate its procurers about the transport implications of their purchasing activity. When developing a DSP the organisation focuses on the transport element of its sustainable procurement to minimise the freight transport impacts of their purchasing methods and decisions.

The main advantages that public and private sector organisations can benefit from developing and implementing a DSP are:

- 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; the DSP helps organisations to fulfil their commitment to reduce CO2 emissions and meet the set CO2 targets as well as other CSR goals.

3.3 Benefits to Freight, Delivery and Servicing Companies

Becoming involved in the development of a DSP provides freight, delivery and servicing companies with an opportunity to review their operations and share and exchange best practice with their customers. Working together and completing the processes undertaken during the development of a DSP will assist them to find the best solutions to manage delivery and servicing activity.

The benefits that freight, delivery and servicing companies can achieve through being involved in a DSP include:

- Fuel savings from fewer and quicker delivery trips
- Increased reliability over delivery times
- Increased driver and vehicle productivity
• Fewer accidents due to fewer journeys
• 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.

3.4 Benefits to residents and visitors

There are benefits to residents and visitors of an organisation developing its DSP. These are around an improved local environment achieved by mitigating the externalities of freight, delivery and servicing activity. Benefits include:

• An improved urban environment and enhanced quality of life
• Reduced congestion due to fewer deliveries, collections and reduced servicing activity
• Improved air quality with reductions in pollution and CO2 generation
• Reduced noise, vibration and nuisance generated by retimed or reduced freight movements
• Lower risk of accidents involving freight vehicles
• Increased compliance with parking, loading and unloading policies and legislation.
4.1 Introduction

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.

Internally, the data can be collected from the existing procedures and systems that ensure the daily run of the organisation. The DSP provides an opportunity to assess how services and contracts are procured, and what procedures are in place to ensure that necessary products and services are provided for the organisation e.g. mail and couriers, stationery and servicing activity e.g. lift repair, etc.

Externally, the data regarding deliveries, servicing and collections can be collected by carrying out an extensive delivery and servicing survey at the premises of the municipality. This survey will record the freight movements or the number of commercial vehicles carrying out loading and unloading and servicing activities over a period of weeks, at the organisation’s buildings, during the normal working hours.

The baseline data gathered both internally and externally will enable areas of improvement to be identified and for the DSP measures to be developed, implemented and for the DSP targets to be set.

4.2 Baseline data collection

4.2.1 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 making note of the following elements:
• Number of vehicles loading and unloading within the observation period
• Size of vehicles used for delivery/servicing activity
• Type of products delivered/collected
• Type of handling units used (roll cage, tote box, loose cartoons)
• Duration of loading/unloading activity
• Single or multiple delivery/collection points
• Issues relating to legal loading/unloading practices
• Instances of PCNs being issued
• Issues relating to road/pedestrian/driver/vehicle safety
• Details of notable frequent receivers or consignors of goods
• Details (from vehicle liveries, where available) of the suppliers carrying out frequent delivery/collection activity.

Using a standard template, the survey can help to collect measurable quantitative delivery, collection and servicing data. An example of a delivery and servicing observation template that will enable this information to be captured is provided in Annex A. To assist with completion of the survey information sheets regarding vehicle classification and types of handling units used for deliveries and collections are included in Annex B and C respectively.

Thus the data gathered is fed to the DSP Co-ordinator who ensures that the data is effectively collated and analysed. For example, recording the type of vehicles carrying out deliveries during the site survey will assist with understanding the type of freight movements and identify any scope for delivery consolidation.

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:

• The route(s) of inbound and outbound delivery and servicing vehicles
• The location(s) most frequently used for loading/unloading activities
• The most adequate and safest access routes for delivery vehicles with minimum disruption to traffic
• The location(s) used by contractors and suppliers undertaking servicing activity.

If an organisation already has procedures in place that allow for the deliveries, collections and servicing to be recorded, such as security or loading bay logs, then it may not be necessary to collect additional information, and this data can be assessed instead. The London Borough of Croydon DSP case study³ illustrates how surveying was completed at the Council’s buildings to gather the necessary data and how the data was subsequently presented.

Croydon Council DSP research

In July 2008, TTR carried out a detailed scoping for London Borough of Croydon looking at the Council’ own freight and delivery generation. Croydon is the largest Borough in London by population with around 350,000 residents. Croydon Council is the largest employer in the borough with a workforce of about 10,500 staff, including teachers in schools.

It was agreed that the DSP Scoping Study would focus on the main buildings of the Civic Complex in Central Croydon which included Taberner House, The Fell Road Building, Croydon Registry Office, The Town Hall, Crosfield House, The Mint Walk Building and Davis House. With support from the Croydon Council Facilities Manager, TTR survey staff conducted two days of onsite delivery surveys. The surveys took place on Monday 1st December (from 09:45 – 15:00) and Wednesday 3rd December (from 09:00 – 16:00).

The findings of the delivery survey data analysis revealed that:

- The majority of vehicle movements were associated with Taberner House (65%) and the Town Hall (15%).
- The majority of vehicle movements (74.31%) were associated with deliveries rather than collections to the Council buildings.
- The majority of deliveries/collections to the site are made by van (41%).
- The majority of vehicles (89%) accessed only one building with 11% of vehicles accessing multiple buildings.
- 90% of deliveries/collections took less than 30 minutes to complete.
- The majority of the activity was for couriers (19%), parcels (18%), packages (8%) and packets (8%).
- Most deliveries/collections were made up of only one item (44%) or two items (13%).
- The most commonly used packaging type was ‘packet’ accounting for 29% deliveries/collections.
- In 28% of cases; the delivery drivers did not know the content of the deliveries. 14% of deliveries were documents and 12% were tender documents.
- A total of 58 different companies carried out deliveries, collections or services to the Council buildings.
- The most frequent deliveries and collections were made by DHL, Interserve, Fed Ex, APC, Royal Mail and Medical Assistance.
- Couriers accounted for over 44% of delivery/collection activities during the survey period.

The survey disclosed that purchasing is managed by the individual departments and so there is also some independent ordering. Office Depot provided the stationery supplies and produced a quarterly report, providing information on the quantity of stationery orders and an estimate of the environmental impact of the processing and delivery of these orders.
As part of the data analysis, TTR produced a number of tables and charts to illustrate the results gathered from the data collected. Examples of these are illustrated below.

**Purpose of activity over the surveying days**

![Bar chart showing purpose of activity over the surveying days]

**Vehicle type used for deliveries and collections**

![Pie chart showing vehicle type used for deliveries and collections]

**Number of trips to one or both of the surveying sites**

<table>
<thead>
<tr>
<th>Time On Site (mins)</th>
<th>Delivery Only</th>
<th>Collection Only</th>
<th>Delivery and Collection</th>
<th>Workman, Repairs and Servicing</th>
<th>Other</th>
<th>Unknown</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - 39</td>
<td>50%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>40 - 49</td>
<td>50%</td>
<td>0%</td>
<td>0%</td>
<td>50%</td>
<td>0%</td>
<td>0%</td>
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<tr>
<td>50 - 59</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>60 - 89</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>90 - 119</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>120+</td>
<td>50%</td>
<td>0%</td>
<td>0%</td>
<td>50%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Total</td>
<td>55%</td>
<td>0%</td>
<td>18%</td>
<td>27%</td>
<td>0%</td>
<td>0%</td>
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</table>
4.2.2 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 situations as above, the contractors completing the servicing need to park up for the duration of the servicing activity, in some cases, for the entire working day nearby the site, as tools, materials and equipment required for the servicing need to be accessible and easy to transport.

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. The development of the DSP will be an excellent opportunity for an organisation to re-assess the servicing activities that take place at their buildings or departments and identify which of the separate servicing activities can be consolidated or which contractors could potentially be rationalised.

This audit process encourages a proactive attitude towards managing servicing activities aiming to reduce the number of unnecessary servicing related journeys and reduce congestion in the surrounding area.

The procurement/purchase teams may be used to gather any other additional information required from suppliers, as they already have an established key contact and a working relationship with companies providing services or works for the organisation. For example, are the suppliers experiencing any difficulties when delivering or collecting from the site?

It may also be necessary to involve facilities/contracts/procurement staff in the data gathering process as they might hold specialised knowledge which can be useful when implementing further operational changes.

The Delivery and Servicing questionnaire in Annex D can be used across the organisations departments to identify the following information:

- The number of suppliers and contractors that provide goods and services for the municipality such as stationery products, catering, Cash In Transit collections, vending and any other servicing work required for the normal daily operation of the organisation
- At what time of the day the majority of the freight activity takes place
- The frequency of the servicing
• The planning involved in servicing activities, i.e. are these carried out frequently or on an ad-hoc basis, as in when a problem occurs?
• Which locations are used on a regular basis for parking for the whole duration of the servicing activity
• Do these affect the general traffic flow or generate any pedestrian or trip hazards.
• Are these activities carried out efficiently, safe and sustainably, etc.

This type of survey can be used to target activities that can be consolidated or pre-arranged.

If an area-wide DSP is being developed for a town centre or a geographical area of discreet size, the same questionnaire can be adapted to survey and gather data from the various tenants, businesses or buildings part of the town centre. This type of survey can gather sufficient data to be analysed on its own. However, for a more complete picture, it should be complemented by an observation survey (Annex A) carried out at the key locations of the site.

4.2.3 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.

The data relating to annual pre-arranged maintenance activities or servicing and/or the regular buildings’ checks, for which a contract is held with a supplier, should not be overlooked when gathering the DSP information. Taking into consideration these activities and engaging the right departments will help to identify any duplication or servicing opportunities for consolidation. This will ensure that the DSP strategy is integrated with other existing sustainable policies or organisational requirements.

As part of the DSP development, it is important that some aspects of the activities required at the site on a daily basis are understood, and the reasons behind the following actions are acknowledged:

• Who makes the day-to-day orders, and how frequently?
• What are the factors that dictate the frequency of deliveries or supplier visits?
• Who makes contract award decisions, and what are the criteria used?
• Is there scope for negotiation with suppliers in contracts, or are contracts due for renewal?
• What are the associated administration and overhead costs associated with high volume billing and invoicing, for instance how much does it cost to process or pay an invoice?
• Where does the organisation expect deliveries to take place?
• How is this location communicated to suppliers?
• Is there scope for reducing administrative processing time for payment of bills, i.e. a single monthly payment rather than numerous ones each month?
• What space is available to provide additional storage?

The DSP baseline data should also include any requirements relating to the sustainable policies existing at the PATHFINDER municipalities and ensure that Policy staff are engaged in the DSP working group. The contribution to the DSP development by policy staff can facilitate insight into the current delivery and servicing practices taking place at the site and to determine how the DSP can be adequately integrated with the policies and strategies already in place.

4.2.4 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. Examples of how the data analysis results could be presented and included in the DSP framework are illustrated above in the London Borough of Croydon DSP case study. 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.

The results of the data analysis will enable the DSP work-group to identify procedures or areas that can be addressed and improved through the DSP. For example, the analysis might identify that more than two stationery suppliers are used by different departments within the same building or municipality, or that a distribution company carries out more than one delivery/collection trips in the same day.

The data analysis can be used to implement changes that will generate immediate and/or long term cost and environmental benefits. For example, the stationery suppliers used can be consolidated to a single supplier with a fortnightly stationery delivery which will have both immediate and long term consequences.
5.1 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.

The data might illustrate, for example, that there are a series of deliveries and servicing activities that are overlapping and which create unnecessary trips to the site. Identification and rationalisation of such activities is of high priority, as these generate congestion and CO2 emissions on the surrounding road network and can waste valuable energy and resources.

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.

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?
- Which activities that present Health and Safety risks can be reduced?
- What are the anomalies or the delivery and servicing activities that occur only in unusual circumstances?
- What activities occur the most and which also represent the least efficient use of financial resources. How can these be improved?
- What are the operations that have the greatest impact on the premises (e.g. due to the type of vehicle used, or the hours during which these activities tend to take place?)

Once the organisation has identified the above points it can then take action to address the issues.

As mentioned above, some changes to the existing organisational systems/processes and staff training might be required whilst implementing a DSP to ensure the best short and long term results. These may include:
• Staff training regarding the new timescales for stationery, catering and other deliveries
• Changes in operational processes e.g. changes to the desk based ordering systems, review of the contractual agreements with delivery and servicing suppliers etc.
• Implementing an online booking system for deliveries
• Adopting a central online system for procurement.

To be able to report, monitor and evaluate the progress of the DSP it is important that a number of targets are set by the organisation. By using this method, the organisation will be able to determine improvement and evaluate the success of the DSP.

5.2 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. Quantifiable targets can be a set e.g. percentage reduction of the activity indicated in the baseline data such as the total number of vehicles carrying out deliveries, servicing and collections at the site, total number of deliveries, collections, number of Penalty Charge Notices issued, etc. When establishing targets the following points should be considered.

• The DSP targets should be easy to measure and monitor against the DSP baseline data; specific actions towards achieving the targets set in the DSP should be included, for each reviewing period since the implementation stage.
• The targets have to be realistic and achievable. “Modest” targets need to be embraced in the first evaluation period, rather than establishing challenging targets that will fail to be met. This first evaluation will enable time for any training and new processes to become familiar with the daily operators. Once the targets are reached, these can be modified and changed for the next six months of the DSP reviewing period. Reaching or achieving targets is a self-motivator for improvement for those participating in the process which should be taken into consideration when setting the initial targets.
• The implementation or the initiation stage of the DSP could start, when the DSP is launched by the organisation. During the evaluation/monitoring stage the DSP targets should be monitored and measured against the DSP baseline every six months or as often as required.
• The objective of the target evaluation is to assess where progress has been made, and to identify where targets have not been met.
• Actions should be taken to maintain positive changes at the organisation. Efforts should be made to reverse any negative performance where improvements and targets have failed to be achieved.
Targets are set to either be met or exceeded. Failure to meet a target is an ‘opportunity’ to re-assess the baseline measurements, understand the failure of any new processes, look at daily implementation with a fresh approach and analyse and deduce new processes and methods to achieve future targets (see 8.2.3).

5.3 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.

For instance where the opportunity to reduce the number of activities at the site has been identified, the main target could be set as the reduction in the total number of deliveries, collections and servicing at the organisations premises by, for example, 25%.

The sub targets can also focus on consolidating deliveries/collections generated by various suppliers and contractors. For example, sub targets could be set as a reduction in the number of stationery suppliers and the number of stationery deliveries. Sub-target 1 would aim to reduce the number of stationery deliveries by 80%, by reducing stationery deliveries from daily to one per week. This change might involve, as mentioned in previous sections, communicating to staff how the new stationery ordering system will work e.g. informing staff that the stationery deliveries will be reduced to one per week, and that the stationery requests need to be submitted by a certain time on a certain day.

All the targets depend on the practices identified in the baseline data and the municipality’s requirements and policies relating to the process of selecting contractors and suppliers. Given a main target of a reduction of 25% in the number of delivery, collection and servicing activities at the organisations premises in the next three years examples of suitable sub–targets could include:

- A 50% reduction in the number of stationery deliveries over the next three years
- Reduction of the number of food and drink deliveries to the municipality’s building(s) by 20% over the next three years, etc.
- An income generation target for charging for the receipt of private parcels at the workplace.

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 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.

An example of target setting is the DSP adopted by the London Borough of Sutton. It involved a collaborative relationship with its stationery supplier and enabled the local authority to obtain greater control over its stationery orders and obtain significant cost savings. It also enabled the Council to reduce the carbon footprint of its stationery deliveries.

**Target Setting – Case study**

**London Borough of Sutton**

Sutton Council aimed to achieve environmental targets as well as save money. The local authority has implemented the following changes in conjunction with its stationery supplier, Office Depot.

- One cost code was used just for the stationery purchase; which allowed greater control over spend and forecasts. All procurement requests had to go through the procurement department which controlled the suppliers’ master list; the master list enabled the procurement team to control the Council’s purchases and enabled them to block some requests that could be made through a contracted supplier, until a higher value order can be placed.
- Sutton Council established long term targets to reduce the percentage of low value orders and to reduce the carbon footprint of its trading orders.
- Moving away from a next day delivery service encouraged staff to wait until there were several products to be delivered in one batch before placing an order.
6.1 Overview

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
- DSP Co-ordinator
- DSP Working Group/ Steering Group
- Facilities manager
- Procurement and staff responsible for contracts, and supply of goods and services
- Marketing and communications
- Staff responsible for environmental improvements and policies
- Key suppliers and contractors.

Their roles and responsibilities are set out below.

6.1.1 DSP Champion

One senior member of staff (Manager/Director/President) is required to support the DSP development and implementation. It is likely that some DSP measures might require agreement and change co-ordination across the various departments of the municipality. This could require senior management authorisation at a level higher than the DSP Co-ordinator.
If a DSP is developed for a small business or a small organisation this role might be given to a senior person who has the authority to implement the changes and measures prescribed by the DSP.

In an organisation the role of DSP Champion could be conferred to a management team member who oversees the majority of the departments and is responsible for the all the functions of the DSP. The DSP Champion will offer support and assistance to the DSP Co-ordinator in implementing the DSP measures across the various departments within the organisation.

### 6.1.2 DSP Co-ordinator

The role of the DSP Co-ordinator is vital for the success and deliverability of the DSP. The Co-ordinator will be the person that will have the “know how” and knowledge and expertise to enable the DSP to be effectively developed. The DSP Co-ordinator is involved in the measures implemented and will ensure that the targets are met within the adopting organisation. The DSP Co-ordinator’s responsibilities may also include:

- The effective and efficient leadership of the DSP implementation process
- Steering and proactively manage the DSP’s internal meetings
- The first point of contact for any of the colleagues’ enquiries and feedback regarding the DSP development
- Responsible/Leading the baseline data gathering process and providing the data analysis
- Assistance in identifying the areas that need to be addressed in the DSP, liaising with staff from various departments to ensure that the DSP measures are implemented, and evaluating the DSP targets
- If required, the DSP co-ordinator will liaise with members of staff that hold local/specific knowledge and expertise, such as the procurement and environmental personnel, on how DSP targets can be met.

Ideally, the DSP Co-ordinator should have some experience in travel planning or sustainable transport operations. Regardless, they should present strong leadership, organisational and negotiation skills to drive forward the DSP actions.

The DSP Co-ordinator and the DSP Champion’s first assignment will be to bring together appropriate people from different departments, and potentially key suppliers to form a DSP working group. For smaller businesses and organisations, a working group might not be necessary as decisions can be mostly taken by the DSP Co-ordinator in conjunction with the DSP Champion, with some support from other staff, as required.
6.1.3 DSP Working Group

For an organisation with multiple departments, it would be useful to establish a DSP Working Group. The Working Group will bring together staff from different departments that will support the DSP development and implementation by:

- Helping with the data gathering process relating to their departments
- Informing and communicating to their colleagues, the DSP’s objectives, progress and targets
- Making decisions on priorities and setting targets for the DSP.

It is recommended that senior representatives from the following departments that can make decisions about the resources available are included in the DSP working group:

- Finance
- Facilities Management
- Environment / Sustainability Team
- Procurement or Contracts Management
- Human Resources
- Representatives of the waste contractors, suppliers of goods and services that will ensure that changes required through the DSP implementation will be effectively communicated to their transport operations teams.

Table 6.1 illustrates some of the actions allocated to the DSP Co-ordinator and the DSP working group.

<table>
<thead>
<tr>
<th>DSP Co-ordinator</th>
<th>DSP Initiation</th>
<th>Baseline Data collection</th>
<th>Setting targets and adopting measures</th>
<th>Implementation</th>
<th>Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure staff from various departments are involved in developing the DSP</td>
<td>Oversee the data collection, analysis and presentation of the results</td>
<td>Suggest priority areas, targets and possible measures</td>
<td>Write the DSP, brief staff, ensure implementation takes place</td>
<td>Gather and review data, measure against the targets, present the results</td>
<td></td>
</tr>
</tbody>
</table>

| DSP Working Group         | Confirm the scope of the DSP | Provide assistance as required | Agree on priority areas and measures | Agree and confirm DSP implementation. Meet regularly to oversee progress | Decide on actions to be adopted to meet the targets and maintain the progress accumulated |
Once the results of the baseline data analysis are available, the working group can also discuss and agree the scope of the DSP identifying who are the main generators of deliveries within the municipality and who shall be involved from the relevant departments. Key staff from the internal mail service, and from other departments that require usage of the courier services, stationery deliveries and waste collection can be involved to establish which internal operation are critical to change and improve.

The working group would meet on regular basis during the development and evaluation stages of the DSP in order to assess what data to be collected, what areas to prioritise and set the DSP targets, how the DSP is performing against the targets, etc. The working group will have to ensure that the right approach is adopted to implement the DSP measures and that the changes are put into effect.

6.1.4 Facilities management

The facilities/ amenities management staff have a key role in the success of the DSP. It is important that such team members to be on board of the DSP working group as they can help with:

- Sourcing and collecting the DSP data
- Designating storage space for deliveries and collections that can be consolidated
- Informing the delivery drivers about using a delivery booking system, and give feedback about the daily use of the booking system
- Identifying if legal loading facilities are used for deliveries and collections
- Monitoring if delivery, collection and servicing activities are carried out according to the Health and Safety practices and within the legal loading times, if loading restrictions are in place
- Information on servicing of the organisations building(s) and ensuring that it is included and completed within the DSP.

6.1.5 Contract Management and Procurement

Other members of staff that play an important role in the successful implementation of the DSP measures are the team responsible for contract management and procurement of goods and services for the organisation. This is because procurement is the root cause of the deliveries and servicing that is being managed through the DSP.

To the suppliers that provide goods and services, the procurement team can outline and enforce the new DSP requirements and ensure that the measures are integrated into their operational practices. As part of the contract agreement and negotiation, the procurement team can negotiate with suppliers how they can work together to achieving the best outcomes for the DSP measures. The contracts and procurement team can also ensure that the suppliers and new contracts work towards meeting the targets and processes identified in the DSP.
6.1.6 Marketing and Communications Manager

The success of implementing the DSP relies on the capacity to communicate with and engage all the organisation's employees to achieve the objectives and benefits of the DSP.

Initial communications will be to provide staff with information about the DSP including the reasons behind its development and how it will be implemented. It can highlight the successes and achievements as well as providing information, including corrective actions for those activities that haven't been as successful as anticipated.

An online staff survey can be used to obtain feedback about the DSP changes, how these measures affect them and what initiatives they will adopt to ensure the feasibility of the DSP can be carried out. The staff survey can be initiated by the communication manager or by the DSP Co-ordinator and establishes a communication channel between the staff and the DSP Co-ordinator. The staff survey will ensure that staff's suggestions, recommendations and “out of the box” ideas can be incorporated and taken into consideration when developing the DSP actions and targets.

6.1.7 Suppliers’ representatives and other servicing providers

To successfully implement and achieve the targets set in the DSP, it is important to involve key suppliers and servicing providers in the process of developing the DSP, including gathering the data for the DSP baseline and implementing the DSP measures.

Suppliers and servicing providers can be invited to join the DSP working group to facilitate the DSP’s implementation, to identify improvements in the current operations and to advise how the new arrangements can be adopted efficiently with minimum disruption and costs. They can, in their turn, inform their management and transport operation teams about the changes desired by the organisation and any new delivery and servicing requirements at a specific site.
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.

### 7.1 Procurement

#### 7.1.1 Introduction

There are two key points that need to be recognised when developing a DSP if the organisation’s 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. An organisation should use its buying power as an instrument to implement change from its suppliers, to promote the operational efficiency measures contained in the DSP and to minimise their and their supplier’s environmental impact.

The second is that employees are unaware of the transport implications of their purchasing. A successful DSP will ensure that transport, and hence energy use becomes a consideration when an organisation procures goods or services. Therefore, the procurement team have the key role in negotiating and working with suppliers and contractors to make deliveries, collections and servicing more sustainable and efficient.

#### 7.1.2 Potential actions for the procurement team

**Reduced number of suppliers**

The rationalisation of an organisation’s supplier base can achieve procurement and operational savings. By elimination of duplicate suppliers and increasing volumes with the remaining suppliers internal and product cost reductions can be negotiated. This process will reduce the operational costs of the organisation and will also reduce the number of deliveries required and the time spent by suppliers on site. Please see the Lambeth council case study over the page⁴.

Increased use of local suppliers
The procurement team, where possible, could source services, products from the local suppliers stimulating the local economy. Contracting local suppliers could also impact on the distances travelled for the provision of products and services. Fewer trips and smaller distances travelled will reduce the overall vehicles’ mileage and the CO2 emissions generated by deliveries and servicing activities.

A co-ordinated procurement approach can also decrease the price of goods procured and achieve long term cost savings. By developing a local procurement framework which includes all of the organisations departments the desired economies of scales can be achieved by suppliers and can reduce the cost of the local produce.

Consolidating Suppliers
The procurement team can investigate if there is any scope for “suppliers’ consolidation”. Rather than have a plethora of specialised suppliers and contractors, the procurement staff could award contracts to suppliers that will provide more products or services. For example, the supplier that provides food and drinks to cover other necessities currently covered by caterers e.g. cutlery tablecloths etc.

Centralised online ordering system
A centralised online ordering system will provide transparency, manipulation and control over the municipality’s procurement activity. The implementation of a centralised ordering system can ensure significant operational cost and environmental savings e.g. waste reduction, fewer deliveries/collections and CO2 savings through analysis of the procurement data.

The online centralised ordering system will consolidate the orders to ensure that the desired economies of scale and full potential cost savings are achieved. It will also reduce the number of hours and cost of staff employed to process orders and invoices so achieving an internal cost saving. This system will increase the potential for order consolidation with suppliers and hence reduce delivery routes overlapping and allow for more operational efficiencies to be made.

7.1.3 Joint Procurement
To achieve costs savings and consolidation of orders and deliveries, partnerships⁵ with other organisations can be set up. Such partnerships allow for orders to be consolidated at the supplier level. The organisations share the same order code, with orders being placed only on certain days of the working week to allow the supplier to consolidate orders and implement an appropriate delivery schedule.

Some organisations in the UK have developed collaborative frameworks to avoid delivery charges and incur unnecessary costs⁶. Please see the case study opposite.

⁵TTR, Further Development of Croydon Borough DSP, Annex A, p.2
⁶Office Depot, (24/12/2010).
Reduced number of suppliers – Case study

Lambeth Council

London Borough of Lambeth is one of the local authorities that strives to make sustainable procurement and is committed to meet its sustainable targets. As part of its Environmental Charter, the council has taken the following steps to reducing its environmental footprint:

- reduced the number of suppliers that they do business with
- the reduction in the number of deliveries to the borough by motor vehicles
- Implementing an electronic purchasing system

These measures enable the council to ensure that the advantages of e-procurement are promoted to sustain the economic vitality of localities including Small and Medium Sized Enterprises (SMEs) and retain economic development benefits within the local community.

Joint Procurement – Case study

Merseyside Collaborative Framework

The Merseyside Collaborative Framework was set up to primarily facilitate the purchase of reduced price recycled products for the framework members. The members have also been looking at ways to reduce the environmental impact of their procurement activities.

The framework is a fully OJEU compliant contract for office consumables, open to local government and other public sector organisations.

The initiatives explored include:
- Keeping order values to above £50 to reduce the number of deliveries they take
- Orders are placed on specific days of the week to enable orders to be consolidated.

The Merseyside Collaborative Framework has been able to demonstrate the environmental savings that have been made:
- Reduced traffic disruption and carbon emissions
- Reduced spending on recycled materials
- Reduced waste by diverting 456 tonnes from landfill through procurement.
Implementing such internal operational measures can have significant benefits for a municipality. These include:

- Reduced cost
- Improved traffic flow in the surrounding area
- Less deliveries at the site
- Reduced mileage
- Reduced Co2 and other emissions
- Reduced waste.

### 7.2 Operational Efficiency

This section includes measures that implemented will achieve potential cost savings and great efficiency in the operations undertaken at an organisation’s site.

#### 7.2.1 Managing deliveries by implementing an online delivery system

Installation of an online delivery/servicing booking system at an organisation's site(s) will ensure transparency and appropriate management of the availability and capacity of the loading areas/bays. The online delivery system could be adapted to inform the staff responsible for deliveries when deliveries are made, who booked the slot and who is the key contact. It will be also a good source of data to analyse and a mechanism to monitor the ongoing activity during the monitoring stage of the DSP.

The online system could be developed to manage and direct the loading activity outside the peak times. If any loading restrictions are in place at the site, the system will allow only to those slots within the legal loading time to be booked, ensuring that deliveries are carried out complying with the legal and driver health and safety requirements.

This measure will impact on the accessibility of the municipality’s surrounding area, ease the congestion on site and reduce pollution and NOX emissions. Each delivery should take place during a specific time slot and multiple deliveries from various suppliers carried out in the same time at the site will be avoided.

#### 7.2.2 Out of hours deliveries and servicing

Operational efficiency of delivery and servicing activity can be increased if it is arranged and carried out outside the peak times or even outside working hours e.g. at the early hours in the morning or after the office working hours in the evening.

The procurement team and the DSP co-ordinator can investigate which deliveries and servicing are suitable for out of hours completion; to adopt such initiatives, the suppliers need to be involved in discussions and negotiations with the DSP Co-ordinator and with the procurement team.
If out of hours deliveries are carried out, the involved parties should also establish a safe location where the delivery drivers could leave the goods, and who is able to allow them in the building. The night time security staff might other key staff that can be involved in the successful DSP implementation, by delegating the task of letting the delivery driver inside the building⁷.

7.2.3 Road Trip Efficiency

Engaging all the DSP components and can increase the road trip efficiency, reduce congestion, improve air quality and reduce the CO2 and NOX emissions.

Great road efficiency can be accomplished by scrutinizing both servicing activities and regular deliveries and collections and find ways of reducing the number of vehicle trips. For example, regular pre - arranged servicing activities carried out for the organisations equipment and buildings’ maintenance can be scheduled at out of hours times, overnight or at the early hours in the morning outside the tidal vehicle and commuter flow times, particularly when these servicing interventions take a few hours to complete. Such servicing trips require, in general the presence of a vehicle on the site where the aid or maintenance tools and equipment is transported from. The procurement team, facilities management staff and servicing providers could discuss and identify various mechanisms to reduce the number of servicing trips required at the organisations premises.

In the case of a collaborative procurement framework, road trips efficiencies, cost savings and reduced congestion can result from:

- Sharing an online delivery booking system
- Sharing the delivery slots with other members of the framework so that multiple deliveries within a location can be completed at the same time
- Identifying and procuring services on a collective basis such as waste collections, office stationery, Cash In Transit Collections, servicing provision from the same suppliers allowing for trips efficiency
- Agreeing on the same time frame for the pre – booked deliveries, collections and servicing
- Sharing the existent loading provision.

7.2.4 Waste Management

The DSP measures will aim to minimise waste, reduce the amount of materials disposed of in landfill, increase recycling and reduce carbon outputs. The DSP will also target the efficiency of waste vehicle movements and reduce congestion on the surrounding road network.

Trip efficiencies can be achieved by reviewing the waste suppliers that provide collection of the various waste streams. There might be scope to rationalise the number of suppliers that provide the same services. Negotiations with key waste collection contractors can lead to consolidating the regular waste

⁷TFL, Delivery and Servicing Plans Making Freight Work for You, p. 24
collections. In this manner, collections of food waste and recyclable waste such as tins, plastic bottles, card and paper can be carried out by the same contractor which may collect both streams at the same time.

To reduce the completion time of waste collections, the industrial waste bins could be aligned at the designated prior to the collection time. The possibility of implementing out of hours collections for waste collections should be also investigated if these currently take place during the peak times.

7.2.5 Design Factors to Take into Account

Developing and implementing DSP measures is a process that organically co-ordinates the internal procedures adopted within an organisation with improvements that might be required to the existing freight infrastructure on the surrounding road network or at the municipality’s building(s) and the management of that infrastructure.

Implementing the DSP measures can be a useful tool for an organisation to target and improve freight infrastructure and to proactively manage the delivery and servicing movements at a site.

The DSP provides the opportunity to assess the design of the surrounding roads and the other freight infrastructure with the aim to reduce emissions, reduce congestion, improve safety and security and potentially reduce costs. This can be achieved by the completion of a Freight Environmental Review System (FERS) survey.

The freight infrastructure changes to be implemented it is important to identify where deliveries and collections usually take place and assess if the locations or the freight facilities are adequate, safe and legal.

A FERS survey aims to record and analyse existing infrastructure used for loading/unloading activities in a selected area. FERS provides a methodology for assessing a series of parameters within a street section or a loading space area with a view to harmonising the ongoing freight activity with other street and road users. FERS can also establish score, establish of suitability of loading bays/areas and provide a strong case for recommendations and improvements of such facilities.

Based on the FERS site audit findings, the DSP measures can consequently bring about:

- Changes in the design of the existing delivery and collection zones
- Changes in the legal loading time by enforcing loading restrictions within the tidal peak times
- Implementation of the legal loading bays and legal loading times
- Any other amendments to any facilities that are used for the necessary servicing activities.
If implemented, procurement team could also include maps of the new loading bays or delivery locations with the new loading restrictions in the ongoing and new suppliers’ contracts. This action will ensure that the existing contractors are knowledgeable and aware of the location and the legal times dedicated for deliveries and collections.

7.2.6 Use of responsible operators
If there is a local fleet recognition scheme in existence it would be good practice for the organisation to actively encourage its suppliers to join the scheme.

Examples of fleet recognition schemes include ECO Stars which recognises operators that have good practice with regard to air quality and the Freight Operator Recognition Scheme (FORS), in London⁸.

These fleet recognition schemes generally assist transport operators to improve their operational efficiencies and reduce their environmental impact. They may provide access for its members to various fuel improvements programmes, legal loading advice, workshops, driver training and benchmarking against other similar companies.

7.2.7 Use of sustainable modes of transport
The procurement staff can also negotiate with contractors and suppliers to shift some of the deliveries/collection of smaller items onto more sustainable modes of transport such as electric carts, motorcycles and bicycles. This could reduce pollution and congestion in the surrounding area and assist with meeting the organisations environmental and carbon policies and DSP targets.

7.2.8 Legal Loading
Involvement of delivery and servicing suppliers in the DSP working group will increase awareness within their organisations about the new delivery and servicing arrangements.

Part of this action will involve informing them of local delivery restrictions and consequently increase compliance with loading regulations and reduce the number of Penalty Charge Notices (PCN) issued to suppliers whilst carrying out on street loading and unloading activities at the organisations building(s).

Other suppliers and potentially users of the loading facilities could be informed about the loading location, time restrictions and, if applicable, the time slot booking system by posting such information of the organisations website, together with a map of the area and the loading point.

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

### 8.1 Data Collection

#### 8.1.1 Data collection
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. The new data collected will enable the comparison with the initial data collected for the DSP baseline and assess the progress made towards each of the targets set by the DSP Co-ordinator and DSP Working Group.

#### 8.1.2 Data Evaluation
To ensure the success and the implementation of the DSP measures, the target monitoring process needs to be carried out on a timely basis e.g. monthly, every six months or on annual basis, depending on the DSP. However, some targets might require more often monitoring than others; in this case the targets monitoring process can be tailored for each specific site.

The DSP Co-ordinator ensures that measures have been implemented accordingly to enable progress on each identified area and that the targets monitoring process can be undertaken successfully.

The external site observation and internal monitoring surveys carried out at the organisations offices may not need to be as extensive as the baseline surveys. The data used to monitor each target should be focused on the specific measures and should only include a day or a week’ snapshot of the site assessment.

### 8.2 Monitoring

#### 8.2.1 Monitoring tools
Developing a DSP Evaluation Template which can be updated as regularly as required is a useful tool that will help control and present the DSP monitoring procedure. The DSP Evaluation 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.

8.2.2 Targets evaluation
The quantitative targets should be analysed and presented 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.

The qualitative DSP tasks such as the appointment of the DSP Co-ordinator, DSP Working Group meetings, due date of the next monitoring/evaluation survey, can be organised into a checklist which once completed, can be illustrated as such and to be easily reviewed as shown in Annex E.

8.2.3 Targets update/Progress to date
The results of the evaluation survey and data analysis will show if the DSP targets have been met. If all the targets have been successfully achieved and exceeded, the targets themselves need to be re-assessed with higher goals and challenges.

If member of staff or the DSP Working Group have made specific efforts towards implementing the DSP measures then their efforts should be acknowledged. It is important to retain staff involvement and encourage greater engagement.

However, it is possible that during the evaluation process to be ascertained that the set targets has not been met or 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.
9.1 Introduction

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.

9.2 Methodology

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

- Sample Selection
- Consultation
- DSP Task Force (1)
- DSP area delivery map
- Drafting of Area-wide Delivery & Servicing Plan
- DSP Task Force (2)
- Procurement workshop
- Development of Preferred supplier list (Area-Wide)
- Communication and Publicity.
**Task 1: Sample Selection**

The first task in developing an Area-wide DSP is to scope out the level of interest in the businesses and residents in an area.

In a potential Area-wide DSP a representative sample of constituent organisations and residents in the area should be selected for initial consultation. These should be chosen to represent the different organisations, geographical areas within the DSP location and to provide a cross section of business types and sizes. It may be that some businesses or residents choose to be represented by business or resident organisations.

**Task 2: Consultation**

In order to scope out the level of interest in a potential Area-wide DSP a variety of consultation methods may be employed. Suggested activities are:

- Face to face interviews with the selected organisations and residents. These are valuable as the aims and objectives of the DSP can be set out and discussed
- Business / resident surveys
- DSP workshop to bring together representatives from local businesses and any relevant management organisation/business groups This will enable presentation of the concept of an area-wide DSP and its potential selection of component measures and to gather feedback on the willingness of local businesses to be involved in DSP development and ultimately to adopt and implement it.

It may be useful for the organisation commissioning the DSP i.e. Municipality or landlord to send an introductory covering letter to each organisation or resident prior to the consultation beginning. This will be effective help in gaining the support of the businesses and facilitating the consultation arrangements.

A semi structured questionnaire / topic guide / survey will facilitate the consultation process and the analysis and reporting of responses. The level of interest in and support for the suggested DSP measures will be discussed with each of the selected organisations. Below is a suggested list of questions which will be used for the interviews:

1. The business participants would be asked about the following relating to their own freight, delivery and servicing arrangements:
   i. The names of their main supplier / deliverers
ii. The nature of the majority of their deliveries
iii. The frequency of deliveries
iv. If they are aware of other businesses in the location that are also served by the same supplier / deliverer
v. Whether they control procurement or if orders are placed centrally.

The first three questions would also be directed to residents and their representative organisations.

2. Are you a member of a business or residents organisation? If so, would they be interested in joining a DSP Task Force?
3. Would businesses make use of a delivery map for the location?
4. Would businesses consider using shared delivery bays?
5. Would businesses make use of a centralised list of suppliers / collection partners, some of whom may be able to offer preferable rates to businesses in the location?
6. Would your company make use of an online portal for businesses to access information – e.g.: online delivery maps / fliers. Would this information also need to be provided as paper copies too?
7. Would you attend a local workshop on procurement? (covering how to save money and reduce the environmental impact of deliveries).
8. Would your company be interested in joining a van sharing partnership? (where businesses within the area pool or share vehicle resources, including the potential to establish a van-sharing partnership).
9. Would you consider encouraging your suppliers to deliver before 8am or after 5pm?
10. Would you consider using suppliers that use alternative modes of transport e.g. bikes / electric vehicles)?

The responses to face to face interviews / surveys should be analysed and reported. The key findings will be used to identify the most appropriate measures for inclusion in the Area-wide DSP.

**Task 3: DSP Task Force (1)**

In order for an Area-wide DSP to be effective, it is crucial that it is led by local businesses and residents, and that they feel a sense of ownership of the DSP. The first task in the development of the Area-wide DSP would therefore be to establish the DSP Task Force and to identify a DSP Champion.

The DSP Task Force would provide a platform for the various parties with an interest in local delivery and servicing activity to come together to discuss issues and find local solutions to local problems. The
task force could report to appropriate institutions e.g. the Municipality and membership of the group could be promoted through local press and newsletters. The task force would be responsible for leading on the development and implementation of the Area-wide DSP and working to maximise the efficiency and safety of local freight transport, while minimising its environmental impacts.

As part of Task 2, face to face interviews will be carried out with 20 businesses in the DSP area. One aim of these interviews will be to recruit businesses to join the DSP Task Force by illustrating the potential benefits of participation to these businesses. If it is not possible to gain a sufficient level of interest at this stage, additional contact will need to be made with businesses in the DSP area to stimulate support for the group. Subject to achieving a sufficient level of interest, an initial series of three meetings of the group is suggested as outlined below. It is recommended that the Area DSP Champion chairs the meetings.

**DSP Task Force Meeting 1**
The aim of the first meeting of the DSP Task Force would be to discuss the findings of the DSP Scoping Phase and suggestions for the Area-wide DSP. The meeting would also be used to discuss and agree the scope of the DSP area delivery map.

**DSP Task Force Meeting 2**
The draft delivery map (task 4) would be shown to the meeting and any comments would be incorporated into the map. The draft Area-wide DSP would be discussed and agreed with the group.

**DSP Task Force Meeting 3**
This meeting would be used to finalise the Area-wide DSP and to agree the plans for implementation.

It may initially be considered that external support is required to support the work of the DSP task force. The intention would be that once the DSP task force had gained experience and confidence in the development of the DSP the level of support would be reduced until the DSP task force became self-supporting. Examples of initial support for the DSP task force include:

- Organisation of meeting dates
- Initial contact with meeting attendees, liaison and coordination
- Drafting the meeting agenda
- Support with the organisation of venue and catering
- Provision of minutes of the meeting.
Task 4: DSP area delivery map

Task 4 will involve the development of a map for delivery drivers showing the location of key businesses and delivery bays in the DSP area. This will form part of the Area-wide DSP. The scope of the map for delivery drivers will be established by the DSP Task Force at the first meeting of the group. The draft map will be discussed at the second meeting and any changes requested by the group will be incorporated. Once finalised, the map will be made available for distribution to businesses in the DSP area in hard copy format. The map will also be made available for download from the internet.

There are two distinct groups that require information on the loading, unloading and parking zones. These are the goods receivers and the delivery drivers / servicing personnel. The goods receivers need to be aware of the scheme; require information to understand how it works; and need information in a format that can be passed on to suppliers and carriers within their supply chain. Delivery drivers require information on the zones themselves and as indicated above, information on other factors that will affect their choice of route.

The focus of the map is to publicise the loading and unloading zones as well as locations for parking for statutory driver rest periods. However, it will be beneficial to include further information on the map that is directly relevant to freight and servicing activity so that drivers have one source of information for the DSP area. We would suggest also including information such as:

- Loading bays and car parks
- Weight, height and width restrictions
- Pedestrianised areas
- Loading restrictions
- One way streets.

Task 5: Drafting of Area-wide Delivery & Servicing Plan

Working closely with the DSP Task Force, the findings of the consultation would be used to develop the Area-wide DSP. The Area-wide DSP would be an accessible central package of measures tailored for the specific needs of businesses in the DSP area.

Suggestions for the Area-wide DSP will be discussed at the first meeting of the DSP Task Force, the draft Area-wide DSP will be discussed at the second meeting and finalised by the final Task Force meeting.

The Area-wide DSP will be concise document, 10 pages maximum, and will effectively form a DSP Action Plan which will need to be updated on a regular basis by the DSP Task Force. The Area-wide DSP
would include objectives, targets and an Action Plan for implementation (including short term, medium term and long term actions and measures). The DSP would also outline plans for monitoring and future revisions of the DSP.

The draft Area-wide DSP will be tailored for the specific needs of businesses based in the DSP Area. However, to give an idea of the types of measures which may be included, below are some example Area-wide DSP measures which may be appropriate.

- The development of a deliveries map showing the location of loading bays, car parks and loading restrictions in the DSP area
- The introduction of shared delivery bays
- Development of a centralised list of suppliers / collection partners for the DSP area.
- Introduction of an online portal for businesses to access information – e.g.: online delivery maps / fliers
- Organisation of a workshop on procurement
- Arranging out-of-hours deliveries e.g. before 8am or after 5pm
- Encouraging the use of suppliers that use alternative modes of transport
- Improvement of and increased use of off street delivery areas.

The outcome of this task will be the Area-wide DSP.

**Task 6: DSP Task Force (2)**

Between 3 and 6 months after the commencement of the Area-wide DSP it is suggested that one further meeting of the DSP Task Force is held. The intention is that this is the final facilitated meeting, and that from this point onwards the DSP Task-Force becomes a stand-alone organisation. The objectives of this meeting would be;

- To ensure that the Area-wide DSP is being implemented and to gain feedback from participating businesses.
- To assess business response to the Area-wide DSP and review the DSP Action Plan accordingly.
- To plan the Procurement Workshop (task 7).
Task 7 – Procurement Workshop

In conjunction with the DSP Task Force, a workshop on procurement would be run which would be open to all businesses in the DSP area, even if they had not been previously involved in the DSP. The workshop would cover how to rationalise procurement in order to save money and to reduce the environmental impact of deliveries.

Task 8: Development of preferred supplier list (Area-wide)

As part of task 2 information will have been obtained from the businesses in the DSP area on the following:

- The names of their main suppliers
- The nature of the majority of deliveries
- Whether there are any suppliers in common with other businesses in the area.

Working closely with the DSP Task Force, this information would be used to develop a list of preferred suppliers. In the longer term it may also be possible for the DSP Task Force to negotiate preferable rates for businesses in the DSP area which could also save businesses money.

Task 9: Communication and Publicity

The key to the success of the new arrangements is communicating the work of the DSP Task Force and the DSP actions to the businesses at, and in the vicinity of the Area-wide DSP, and also to their suppliers. This is especially important when the DSP measures are implemented. It is suggested that the following actions are completed to ensure that a consistent message is communicated to all of the interested parties.

1. A simple newsletter in MS Word format providing businesses with information on the progress of the DSP Task Force and the implementation of the new arrangements. Circulation should take place on a regular basis to help promote the work of the Task Force and to maintain business interest in the Area-wide DSP. An edition should be circulated two weeks prior to the new DSP arrangements coming into force.

2. A simple leaflet in MS Word format outlining the specific DSP measures being implemented to be produced for businesses and their suppliers to pass on to all the organisations involved in delivery and servicing activity in the DSP area.

3. The above information to be made available via the internet and by social media.

4. Arrangements will be made for the new arrangements are being publicised via suitable organisations e.g. Municipality, trade associations, business associations etc.
9.3 Summary

It is intended that the above set of actions provides 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.
10.1 Introduction

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:

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

10.2 DSP Review Framework Checklist

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. Please note that the list should not be considered exhaustive, some questions may be superfluous and further questions may need to be added depending on the DSP and the requirements of both the DSP author and the reviewing organisation.

1. The Delivery and Servicing Plan (DSP)

- Has a DSP been produced and submitted in;
  - Hard copy?
  - Electronic version?
- Has a DSP owner or DSP Champion been identified?
• Was the document produced by the organisation owning the DSP, or by a consultant / subcontractor?
• Was there a prior Construction Logistics Plan for the location?
• Is there a good evidence base for the DSP?
• Is the level of DSP suitable for the location that it covers?
• Is waste and recycling considered as well as deliveries and servicing?
• Are any Planning or Environmental Health conditions being met?

2. Reducing delivery, servicing and collection frequencies

• Is the organisation able to reduce / consolidate suppliers?
• Is there an opportunity for combined procurement?
• Is there an opportunity for the organisation to establish a centralised procurement system?
• Are general deliveries made?
• Is a ‘consolidation’ operation part of the delivery process?
• Are goods received through a mixture of general / consolidated deliveries?
• Are out-of-hours deliveries able to be made?

3. Identify and promote where safe and legal loading can take place

• Is there a map of the delivery location(s)?
• Is the delivery location on-street?
• Is the delivery location off-street?
• Is the delivery location for ‘consolidated’ loads or general deliveries?
• Is the delivery location for exclusive use or is it a combined delivery facility?
• Does the proposed delivery location(s) minimise / reduce the number and impact of delivery activities once the building is in use
• Does the DSP promote using more sustainable delivery methods e.g. cycles rather than vans, requesting that suppliers use electric vehicles?

4. Using freight operators who can demonstrate their commitment to best practice

• Best practice in delivery and servicing:
  – FORS (London http://www.fors-online.org.uk)
  – ECO Stars (UK and Europe http://www.ecostars-europe.eu/en/)
5. Health and Safety

- Will implementing the DSP lead to reduced noise;
  - During travel?
  - During deliveries?
- Will implementing the DSP reduce pollution and improve air quality?
- Is the safety of vulnerable road users considered i.e. motor-cyclists, cyclists and pedestrians?
- Is the identified delivery location considered safe?

6. Ongoing DSP Activity

- Does the DSP include an Action Plan which is updated continually throughout the lifetime of the DSP as the DSP tools are implemented?
- How is the DSP to be monitored?
  - Must link back to the objectives
    - Planning Condition(s)
    - Air quality
    - CO₂
    - Traffic & congestion
    - Waste & recycling
  - Indicators must be relevant & measurable
  - Need a consistent input data and calculation methodology
  - Also need a system of data verification
- Have formal reviews been set for any Planning or Environmental Health conditions?

7. Municipality Requirements

- Does the DSP document meet planning conditions that have been set?
- Does the DSP document address Air Quality and noise concerns?
- Does the DSP document address Highways and Transportation, including Sustainable Travel and Road Safety issues?
- Does the DSP document meet any other Municipality statutory or discretionary requirements?

A copy of the DSP Review Framework Checklist is provided in Annex F. The document will contain any comments that are recorded as part of the review which will be used as a basis for the response to the DSP author to either confirm that the DSP is compliant or to highlight areas where the DSP requires modifying to meet the statutory or discretionary requirements.
These resources can all be found on the TRAILBLAZER website as well as via the web links provided below.

### 11.1 References

**Communities and Local Government**, *Planning Policy Guidance 13 (PPG13)*, April 2001
(01/12/2010).

**Freight Operators Recognition Scheme**
http://www.tfl.gov.uk/microsites/fors/
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**Transport for London (TfL)**, *Guidance for Workplace Travel Planning for Development*
(01/12/2010).

**Transport for London (TfL)**, *A guide to DSPs*
February 2010.

**Transport for London (TfL)**, *Delivery and Servicing Plans, Making Freight Work for You*
February 2010.

**Transport and Travel Research (TTR)**, *Croydon DSP Scoping Study*
January 2009.

**Transport and Travel Research (TTR)**, *Further Development of Croydon Borough DSP*
March 2010.

**Transport and Travel Research (TTR)**, *Further Development of the DSP for Bromley Council Final Report*
March 2010.
# Annex A
## Delivery and Servicing Observation Sheet

<table>
<thead>
<tr>
<th>Other Comments</th>
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<tbody>
<tr>
<td>Trailing Point</td>
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</tr>
<tr>
<td>Loss of Loading/Unloading</td>
<td>Y/N</td>
</tr>
<tr>
<td>PCN Issued</td>
<td>Y/N</td>
</tr>
<tr>
<td>Loading and Unloading Issues</td>
<td></td>
</tr>
<tr>
<td>Safety Issues</td>
<td></td>
</tr>
<tr>
<td>Collection Points</td>
<td></td>
</tr>
<tr>
<td>Single or Multiple delivery</td>
<td></td>
</tr>
<tr>
<td>Type of Handling units</td>
<td></td>
</tr>
<tr>
<td>Roll cage, tote box, bale, etc.</td>
<td></td>
</tr>
</tbody>
</table>

### Data Coding Page Reference

<table>
<thead>
<tr>
<th>Name of the Surveyor</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of the Surveyor</td>
<td></td>
</tr>
<tr>
<td>Contact details</td>
<td></td>
</tr>
<tr>
<td>First 4 Letters of Vehicle Registration</td>
<td></td>
</tr>
<tr>
<td>Vehicle Type</td>
<td></td>
</tr>
<tr>
<td>Time of Departure</td>
<td></td>
</tr>
<tr>
<td>Time of Arrival</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>Building Serviced</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th></th>
</tr>
</thead>
<tbody>
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<td></td>
</tr>
</tbody>
</table>
## Annex B
Vehicle Classification

<table>
<thead>
<tr>
<th>Classification</th>
<th>Code as</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedestrian</td>
<td>P</td>
<td><img src="image" alt="Pedestrian Icon" /></td>
</tr>
<tr>
<td>Bicycle</td>
<td>B</td>
<td><img src="image" alt="Bicycle Icon" /></td>
</tr>
<tr>
<td>Motorcycle</td>
<td>C</td>
<td><img src="image" alt="Motorcycle Icon" /></td>
</tr>
<tr>
<td>Car Derived Van</td>
<td>CV</td>
<td><img src="image" alt="Car Derived Van Examples" /></td>
</tr>
<tr>
<td>Van</td>
<td>V</td>
<td><img src="image" alt="Van Examples" /></td>
</tr>
<tr>
<td>2 axled Rigid up to 7.5 tonnes (long wheel bases)</td>
<td>2Ra</td>
<td><img src="image" alt="2 Axles Rigid Van Examples" /></td>
</tr>
<tr>
<td>2 axled Rigid 7.5 – 18 tonnes</td>
<td>2Rb</td>
<td><img src="image" alt="2 Axles Rigid Van Examples" /></td>
</tr>
<tr>
<td>3 axled Rigid 18 – 26 tonnes</td>
<td>3R</td>
<td><img src="image" alt="3 Axles Rigid Van Examples" /></td>
</tr>
<tr>
<td>4 axled Rigid 26 – 34 tonnes</td>
<td>4R</td>
<td><img src="image" alt="4 Axles Rigid Van Examples" /></td>
</tr>
<tr>
<td>Articulated Vehicles according to the number of axles</td>
<td>3A, 4A, 5A, 6A</td>
<td><img src="image" alt="Articulated Van Examples" /></td>
</tr>
</tbody>
</table>
Annex C
Handling Units

Plastic Trays
Plastic Containers
Tote Boxes

Loose Cartons
Roll Cages
Dairy Roll Cage

Cash and Carry Trolley
Garment Rails
Commercial Waste Bins
Bags
### Annex D
Delivery and Servicing Questionnaire

#### Delivery and Servicing Survey

<table>
<thead>
<tr>
<th>Time</th>
<th>Date</th>
</tr>
</thead>
</table>

#### Address Details

- **Name of Department**
- **Building**
- **Street**

#### Contact Details

- **Telephone**
- **Email Address**
- **Web link**

#### Interview Name

### Q2
Please can you tell me your working hours?

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Monday</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Tuesday</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Wednesday</td>
</tr>
<tr>
<td>Thursday</td>
<td>Thursday</td>
</tr>
</tbody>
</table>

### Q3
Approximately, how many delivery, collection or servicing activities do you have during an average day/week?

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>Delivery</td>
</tr>
<tr>
<td>Collection</td>
<td>Collection</td>
</tr>
<tr>
<td>Servicing</td>
<td>Servicing</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
</tbody>
</table>
### Q3 - What types of deliveries and collections are made to your department / premises?

<table>
<thead>
<tr>
<th>Item</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goods necessary for the offices e.g. newspapers, stationary, document storage, furniture, laundry</td>
<td>1</td>
</tr>
<tr>
<td>Couriers and Mail e.g. letters, parcels, mail bags, bundles</td>
<td>2</td>
</tr>
<tr>
<td>Consumables (own consumption) e.g. Water (bottled), catering/vending</td>
<td>3</td>
</tr>
<tr>
<td>Servicing e.g. Contractors / builders, IT servicing, empty crates</td>
<td>4</td>
</tr>
<tr>
<td>Waste/Recycling</td>
<td>2</td>
</tr>
<tr>
<td>Any other deliveries</td>
<td>4</td>
</tr>
</tbody>
</table>

### Q4 - What types of servicing activities take place at your premises?

<table>
<thead>
<tr>
<th>Item</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Servicing necessary for the entire building e.g. water supply, gas supply, plumbing, electricity work, painting etc.</td>
<td>1</td>
</tr>
<tr>
<td>Servicing necessary for the offices e.g. IT, Electricity work, printer servicing, fire alarm, etc.</td>
<td>2</td>
</tr>
<tr>
<td>Waste/Recycling</td>
<td>3</td>
</tr>
<tr>
<td>Any other servicing</td>
<td>4</td>
</tr>
</tbody>
</table>

### Q5 - Can you tell me how many stationery suppliers do you regularly use?

<table>
<thead>
<tr>
<th>Stationery suppliers</th>
<th>Used to provide:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
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<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
</tbody>
</table>

### Q6 - Can you tell me how many servicing contractors do you regularly use?

<table>
<thead>
<tr>
<th>Photocopier Servicing</th>
<th>Used to provide:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
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<tr>
<td>Name</td>
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<td>Name</td>
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<td>Name</td>
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</tbody>
</table>

### Q7 - Can you tell me how many catering and vending providers do you regularly use?

<table>
<thead>
<tr>
<th>Catering and vending providers</th>
<th>Used to provide:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
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<tr>
<td>Name</td>
<td></td>
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<tr>
<td>Name</td>
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<tr>
<td>Name</td>
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</tr>
</tbody>
</table>
### Q8
**Can you tell me how many courier and parcel delivery providers?**

<table>
<thead>
<tr>
<th>Name</th>
<th>Used to provide:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Q9
**Can you tell me how goods are delivered to, and collected from your premises / department?**

<table>
<thead>
<tr>
<th>On Pallets</th>
<th>In Roll/Cases</th>
<th>In large boxes</th>
<th>In loose cartons</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>1  2  3  4  5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection</td>
<td>1  2  3  4  5</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

### Q10
**Are your deliveries / collections planned or ad hoc / as and when?**

<table>
<thead>
<tr>
<th>Planned to be schedule</th>
<th>Ad Hoc / As and When</th>
<th>Both Planned and ad hoc</th>
<th>Don’t Know</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>1  2  3  4  5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection</td>
<td>1  2  3  4  5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Q11
**During which period(s) do the majority of your deliveries, collections, servicing activities take place?**

<table>
<thead>
<tr>
<th>Time</th>
<th>Delivery</th>
<th>Collection</th>
<th>Servicing Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before 7am</td>
<td>1  2  3  4  5  6  7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7am-10am</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>10am-4pm</td>
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</tr>
<tr>
<td>4pm-7pm</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>After 7pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Applicable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Set Time</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Delivery</th>
<th>Collection</th>
<th>Servicing Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before 7am</td>
<td>1  2  3  4  5  6  7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7am-10am</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>10am-4pm</td>
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<td></td>
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<tr>
<td>4pm-7pm</td>
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<tr>
<td>After 7pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Applicable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Set Time</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Q12
Can you tell me what type of vehicles deliver to, collect from your department / premises?

<table>
<thead>
<tr>
<th>Van</th>
<th>Tray goods vehicle</th>
<th>Articulated good vehicle</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

**Delivery**

| 1   | 2 | 3 | 4 |

**Collection**

| 2   | 2 | 2 | 2 |

### Q13
On average, how long does a delivery, collection or servicing activity take to complete?

<table>
<thead>
<tr>
<th>&lt;10 minutes</th>
<th>10 - 20 minutes</th>
<th>20 - 30 minutes</th>
<th>30 - 40 minutes</th>
<th>40 - 50 minutes</th>
<th>50 - 60 minutes</th>
<th>&gt; 60 minutes</th>
<th>No Set Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Collection</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Servicing Activities</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

### Q14
What is the location from which vehicles load / unload their deliveries and collection and park for servicing activities?

<table>
<thead>
<tr>
<th>On Street Loading Bay</th>
<th>On Street</th>
<th>Off Street Loading Yard</th>
<th>Street with Rear Access</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**Street Names**

**On Street Loading Bay Street Name:**

**On Street Name:**

### Q15
Who controls the Ordering of goods / products for the business?

<table>
<thead>
<tr>
<th>You or an Employee</th>
<th>Head Office</th>
<th>Suppliers</th>
<th>Other</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Who controls when the servicing takes place for the business?

<table>
<thead>
<tr>
<th>You or an Employee</th>
<th>Head Office</th>
<th>Suppliers</th>
<th>Other</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
### Q16: Do you control when delivery / collection and servicing takes place?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Don't Know</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Collection</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Servicing</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

### Q17: Can you tell me of any problems associated with your deliveries, collections and servicing activities in your department?

*Comments*

### Q18: Do you have any suggestions, from your experience, on how to improve delivery, collection and servicing activities in terms of efficiency, safety and sustainability?

*Comments*
## Annex E
### Qualitative DSP Tasks Checklist

<table>
<thead>
<tr>
<th>Qualitative DSP check tasks</th>
<th>Yes</th>
<th>No</th>
<th>Key Information</th>
<th>Comments</th>
<th>Date of the Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the municipality have a DSP Co-ordinator?</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Is he happy and understands his responsibilities?</td>
<td></td>
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<tr>
<td>Does the DSP have a nominated DSP Champion?</td>
<td></td>
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<tr>
<td>Does the DSP have a DSP Working Group?</td>
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<tr>
<td>Do the DSP Working Group involves from the following departments:</td>
<td></td>
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<tr>
<td>Facilities Management</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Contracts Management and Procurement</td>
<td></td>
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<td></td>
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<tr>
<td>Marketing and Communications</td>
<td></td>
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<tr>
<td>Suppliers’ representatives</td>
<td></td>
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<tr>
<td>Has the 1st meeting taken place?</td>
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<tr>
<td>Has the 2nd meeting taken place?</td>
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<tr>
<td>Are there any other meeting scheduled in the future?</td>
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<tr>
<td>When?</td>
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<tr>
<td>Has there been a data collection exercise?</td>
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<tr>
<td>If Yes</td>
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<tr>
<td>Does the staff involved understands the task?</td>
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<tr>
<td>When the exercise carried out?</td>
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<tr>
<td>What key lessons were learnt?</td>
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<tr>
<td>If No</td>
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<tr>
<td>When it this due?</td>
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<tr>
<td>Has the baseline data been collected?</td>
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<tr>
<td>When was carried out?</td>
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<tr>
<td>Which were of the following were completed?</td>
<td></td>
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<tr>
<td>Delivery, collections and servicing site observation survey</td>
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<tr>
<td>Internal servicing survey</td>
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<tr>
<td>Site assessment</td>
<td></td>
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<tr>
<td>Data analysis</td>
<td></td>
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<tr>
<td>Has it been an evaluation survey carried out?</td>
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<tr>
<td>When was carried out?</td>
<td></td>
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<tr>
<td>Which of the following were completed?</td>
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<tr>
<td>Delivery, collections and servicing site observation survey</td>
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<tr>
<td>Internal servicing survey</td>
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<tr>
<td>Site assessment</td>
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<td></td>
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<tr>
<td>Data analysis</td>
<td></td>
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<tr>
<td>Issue</td>
<td>DSP Review Framework Checklist</td>
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<tr>
<td>1. The Delivery and Servicing Plan (DSP)</td>
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<tr>
<td></td>
<td>Has a DSP been produced and submitted in:</td>
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<tr>
<td></td>
<td>Hard Copy / Electronic Version</td>
<td></td>
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<tr>
<td></td>
<td>DSP owner or DSP Champion been identified?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Was the document produced by the organisation owning the DSP, or by a consultant/subcontractor?</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Was there a prior Construction Logistics Plan for the location?</td>
<td></td>
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<tr>
<td></td>
<td>Is there a good evidence base for the DSP?</td>
<td></td>
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<tr>
<td></td>
<td>Is the level of DSP suitable for the location that it covers?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Are any planning or Environmental Health conditions being met?</td>
<td></td>
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<tr>
<td></td>
<td>Is waste and recycling considered as well as deliveries and servicing?</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>2. Reducing delivery, servicing and collection frequencies</td>
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<td></td>
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<tr>
<td></td>
<td>Is there an opportunity for the organisation to establish a centralised procurement system?</td>
<td></td>
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<tr>
<td></td>
<td>Is there an opportunity for combined procurement?</td>
<td></td>
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<tr>
<td></td>
<td>Is the organisation able to reduce / consolidate supplies?</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td></td>
<td>Are general deliveries made?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is a consolidation / operation part of the delivery process?</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Are goods received through a mixture of general / consolidated deliveries?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Are out-of-hours deliveries able to be made?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Issue</td>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Identify and promote where safe and legal loading can take place (cont)</td>
<td>Is the delivery location on-street?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is the delivery location off-street?</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Is the delivery location for ‘consolidated’ loads or general deliveries?</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Is the delivery location for exclusive use or is it a combined delivery facility?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Is there a map of the delivery location(s)?</td>
<td></td>
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<tr>
<td></td>
<td>Is a delivery booking system required?</td>
<td></td>
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<tr>
<td></td>
<td>Does the proposed delivery location(s) minimise / reduce the number and impact of delivery activities once the building is in use?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Does the DSP promote using more sustainable delivery methods e.g. cycles rather than vans, requesting that suppliers use electric vehicles?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Using freight operators who can demonstrate their commitment to best practice</td>
<td>Fleet Operator Recognition Scheme (FORS)</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>ECO (Efficient and Cleaner Operations) Stars</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Issue</td>
<td>Comments</td>
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</tr>
<tr>
<td>5. Health and Safety</td>
<td>Will implementing the DSP lead to reduced noise;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- During travel? / - During Deliveries</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Will implementing the DSP reduce pollution and improve Air Quality?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Is the safety of vulnerable road users considered i.e. motor-cyclists,</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>cyclists and pedestrians?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Is the identified delivery location considered safe?</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6. Ongoing Activity</td>
<td>Does the DSP include an Action Plan which is updated continually</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>throughout the lifetime of the DSP as the DSP tools are implemented?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>How is the DSP to be monitored?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Have formal reviews been set for any Planning or Environmental Health</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>conditions?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>7. Municipality Requirements</td>
<td>Does the DSP document meet planning conditions that have been set?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Does the DSP document address Highways and Transportation, including</td>
<td></td>
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<tr>
<td></td>
<td>Sustainable Travel and Road Safety issues?</td>
<td></td>
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<tr>
<td></td>
<td>Does the DSP document meet any other Municipality statutory or</td>
<td></td>
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<tr>
<td></td>
<td>discretionary requirements?</td>
<td></td>
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</tbody>
</table>