

Scheduling Procedure [Updated for 22 February 2026]

Purpose:

The Scheduling Procedure ensures that bus routes and timings are planned efficiently. It establishes an equitable balance between the operational and commercial imperatives of the business, while ensuring that colleagues and customer safety and welfare are at heart of all decisions, that Drivers have the correct training and information to complete the route and that the correct vehicle resource is identified and allocated to each route.

Scope:

The safe and reliable operation of all bus routes.

Definition:

AVL – Automatic Vehicle Location (analysed through HASTUS).

EPM – Internal database reporting incidents, lost mileage and Fail To Clears.

HASTUS – Scheduling software provided by GIRO.

LB roads – Internal database for reporting road works and events.

Procedure:

Commercial Team

- Respect the legislative process as defined by the Scottish Traffic Commissioner for the registration, changing or cancelation of local bus services. Timelines will vary under a Short Notice request.
- Respect Company timelines and minimum notice periods for the sharing of information with relevant departments, Trade Union and Drivers in respect of changes to services, duties and/or rotas [ref Schedules Policy V1]. This will vary under a Short Notice request. Appendix 1 [Duty/Rota Change Procedure] details the timeline and procedure for changes to duties and rotas at garages.
- Consider the impact the service change date may have in relation to public holidays and special events, where different timetables may be in operation and affect the timely loading of duties and rotas by Operational Support colleagues. Where a date clash is unavoidable, consider mitigation measures to maximise available loading time.
- Collate feedback on any regular/persistent issues that cause problems to the safe and reliable operation of bus routes across the network. In addition to feedback from Company Departments/stakeholders, LB roads and EPM are sources of data.
- Engage the Service Delivery Manager and the Commercial Manager to understand any planned works or major projects that could impact on the network with a view to mitigating disruption through dialogue with local authorities.
- Analyse running times using AVL & HASTUS and identify opportunities to refine.

- Where routes are planned to run in new areas, engage the Training/Risk team to test the suitability of roads/infrastructure and vehicles to identify any interventions required (for example identification of low bridges and any mitigation measures).
- Create revised vehicle and crew schedules using HASTUS in consideration of feedback and analysis which adheres to driving time regulations and Company Agreements.
- Engage Trade Union for the purpose of cross-checking crew schedules/rotas and compliance with Company Agreements.
- Engage Training/Risk team and share details of any new routes/changes to routes to enable Route Risk Assessments to be prepared for driving and training staff in advance of service change. This will include new areas, existing areas in a new direction, changes that take a route into an area with a low bridge, private land not currently serviced or any other locations assurance might be required.
- Engage Engineering to ensure that vehicle allocation can be matched to routes to accommodate customer demand. The appropriate number of vehicles must be provided for service daily and must be allocated in respect of any carriageway restrictions (width, height, geometry etc) and clean air or environmental restrictions.
- Brief relevant/nominated local authority Transport Manager/Officer.
- Brief Marketing/Communications to ensure timely communication of changes are issued to all staff via email and electronic noticeboards.
- Issue running boards to Garage/Desk, including any necessary notes to drivers in relation to routing instructions and route safety controls. Off service routes added/amended in LB roads,
- Issue Run-Out sheets (OM107) to Garage/Desk, which detail vehicle/vehicle type allocation for each route and time out the garage.
- Issue Traffic Circulars (OM607) where appropriate highlighting changes to/new routes including any specific guidance to drivers.
- Issue duty sheets and rotas to the Garage/Desk for display on notice boards and internal electronic applications.

Training/Risk

- Promptly feedback any regular/persistent issues that cause problems to the safe and reliable operation of bus routes across the network, to the Commercial team, so that they can be considered at the first opportunity.
- Where routes are planned to run in new areas, test the suitability of roads/infrastructure with an appropriate vehicle and identify any interventions required in a timely manner, reporting findings to Commercial team & Operations Director (for example the identification of low bridges and any mitigation measures).
- Prepare and maintain up to date Route Risk Assessments for all routes. Where there are new routes/changes to routes, ensure these are published on the Operations Hub for driving and training staff in advance of service change.
- Ensure that any learning needs identified from service changes / new routes are reported to the Commercial team and Garage management, and assisting with training as necessary

Garage/Desk

- Ensure that the correct running boards are issued and returned on a daily basis.
- Ensure that the correct Run-Out sheets (OM107) are used on a daily basis.
- Ensure that Traffic Circulars (OM607) are promptly and correctly displayed.
- Ensure that the correct duty sheets and rotas are correctly displayed and obeyed.
- Ensure that the misallocation sheet is completed and returned on a daily basis so that any issues with vehicle allocation is flagged immediately.

Engineering

- Action the request for vehicle allocation matching routes to accommodate customer demand. Ensure the appropriate number of vehicles are provided for service on a daily basis allocating in respect of any carriageway restrictions (width, height, geometry etc) and clean air or environmental restrictions.
- Ensure that Engineering Support are aware of new service numbers and block numbers, so these can be added into Freeway.

Trade Union

- Cross-check crew schedules and/or rotas in advance of any service change to ensure compliance with current Schedules Policy.
- Flag any changes to schedules that may have an effect of rate of pay applied to a duty.

Marketing/Communications

- Ensure the timely communication of changes are issued to all staff via email and electronic noticeboards.

All Company Departments/stakeholders

- Promptly feedback any regular/persistent issues that cause problems to the safe and reliable operation of bus routes across the network, to the Commercial team, so that they can be considered at the first opportunity.

References:

Run-Out Procedure

Sign-On Procedure

Schedules Policy

Relevant Forms:

OM107 Run-Out

V4. January 2026

Commercial Dept - Lothian Buses

Table 1 [letters to shareholders May 2023]:

10 weeks prior to implementation – Statutory confidential pre-notification of any changes to the Public Transport team (timetables and route descriptions)
8 weeks prior to implementation – Briefing with relevant/nominated local authority Transport Manager/Officer
6 weeks prior to implementation – Registration of changes with the Office of the Traffic Commissioner (OTC)
4-5 weeks prior to implementation – Information begins to be posted on OTC website and is published in the official Notices and Proceedings publication
4 weeks prior to implementation – (on official acceptance of registrations), confidential and embargoed information to elected members who have registered to receive communication in advance
No less than 3 weeks* prior to implementation – changes are advertised publicly (*subject to variation depending on other significant events across the network)
<i>There are some instances where these deadlines are not be achievable, such as short notice changes for roadworks, events or other disruption and routine Christmas/New Year timetable changes. In these cases, we undertake to ensure that information is sent to elected members in the days before any public advertisement is made.</i>

Appendix 1

Duty/Rota Change Procedure

Information gathering and implementation

Duty schedules and rotas will be created, using the parameters and rules agreed between the company and the Trade Union, as set out in the Schedules Policy. The Trade Union will be given adequate time to check and comment on any changes, but will not withhold their approval for implementation, so long as they are compliant with this agreement.

The dates of changes will vary annually, for good operational and commercial reasons, although the company will try and limit the overall number of changes whenever possible. Under normal circumstances the timeline for information gathering and implementation will apply (shown below - *Minimum Timeline - Duty/Rotas*) and will be communicated to those concerned in advance, in the form of an Action Tracker, which will be issued by the company.

In the event of a short notice registration, or an emergency, which requires immediate action on the part of the company, it will undertake to honour all parts of this scheduling agreement, but the timelines involved may be shortened. In all cases the Trade Union will be consulted and kept informed.

The procedure for special event services, which are based on voluntary duties, will be advised on each occasion, and will not form part of the Scheduling Agreement, on the understanding that these will be allocated to volunteers only.

For Public Holiday and Festive duties, an additional Action Tracker will be produced, detailing the timelines required, unless these are included as part of a service change.

The company and Trade Union should track duty/rota issues/requests as part of the monthly garage meetings, of which the garage Schedules Officer should be present. However, on being notified of an upcoming service change, garage management teams and the Trade Union should communicate their specific individual priorities in the weeks prior to the change.

These priorities should be communicated by email or in writing, so that these can be referenced once the duty making process is underway. Any other technical enquiry should be discussed in the monthly garage meetings, and prior to duty creation. Changes in Travel Times, should be requested, if required, using the process described in section 10.

Where possible, the company, will try and accommodate all requests, set against prevailing and wider business objectives. After a staff position has been established and agreed (the mix between rota types, DU/SD mix etc.), there will be no further alterations or rebuilding of rotas, unless mutually agreed.

The company will always strive to provide the most efficient duties, with driver numbers supplied having already been built into forecasting and training school supply. Requests for additional lines of work, and/or substituting 'SP' into rotas will impact driver forecasting across the company and should, under normal circumstances, be avoided.

Two Trade Union representatives from each location will be guaranteed facility time to check duties and rota at each service change.

The time allowed for each garage to check duties and rotas is three days, except for Central Garage, where four days are allocated.

For Public Holidays, one day will be allowed for checking at each location. For Christmas and New Year duties, due to the number of individual days requiring to be checked, the same number of days will be allowed, as if checking for a service change.

A 'checking day' shall be no less than 7h48 in length.

Members of the Schedules team will be on hand for any advice or clarifications to be sought, during normal working hours. Once checking has been completed, a separate meeting will then take place between the Trade Union and company, to make any final changes and 'sign off' the duties as passed. This may take place virtually, or at a garage location, as agreed by the individuals concerned.

The Trade Union do not have the right to reject any duty or rota, if they are deemed to be compliant with the principles of the Scheduling Policy.

Dates for checking will be agreed between the local garage management and participating Trade Union representative/s, adhering to the principles of the Action Tracker issued by the Schedules team.

To avoid any miscommunication of changes to rota lines/duties, these should be requested of the relevant member of the Schedules team, in the form of an email, or, alternatively, in the presence of another member of the management team, and a documented record of all requested, and all changes made, should be kept.

The company will provide basic statistics to aid the relevant participants in the checking process. These will be:

- the number of double weekends
- the percentage of Sunday and Saturday days off, on the main DU5 Rota.

It is expected that the company and Trade Union will act reasonably and fairly within the agreement, and if more time is required for discussion/checking, that this will be communicated and arranged in a fair and equitable manner.

Disputes, that can't be agreed with the individual Schedules Officer, should initially be raised to the Schedules Manager for resolution, within agreed facility time.

Duty/Rota Change Procedure

Timeline

Week	Action	Notes
-14\$	Action Tracker opened for GM's comments and suggestions. Comments welcome +4 weeks after service change	Commercial Manager to open log
-10	Pre-Notification with local authorities	
-10	Meet with GMs to convey service change Gather initial thoughts around duties and rotas GMs should have identified their priorities ready to be communicated. Ops Risk, Ops Support and Control Duty Manager will also be able to give feedback and be advised	Commercial Manager / Schedules Manager / Senior Schedules Officer / Network Planning Officer in attendance
-9	Schedules team meet with garage TU for duty and rota feedback. TU should have identified their priorities ready for communication	Schedules Manager / Schedules Officer in attendance
-8	Final requests from GMs and TU to be submitted for consideration and final requests for rota set up requirements (this will be the final chance for garages to request changes to style of driver (DD/SD mix))	Schedules Officer
-8 to -6	Duty and rota creation finishing touches Staff Managers consulted on fixed/special shifts	Schedules Officer
-6	Registrations submitted to Traffic Commissioner	
-6*^	TU advised of detail of service change. Proposed duties and rotas to GM/TU for checking (minor tweaks only, no significant changes to rotas).	Schedules Manager / Senior Schedules Officer / Branch Chair & Secretary
-6**	Changes will be made, where practical, by the Schedules Officer in attendance with TU/GM, at individual garage location, after TU check	GM / Schedules Officer / Garage Convenor / Garage Roster Rep
-5	Approved duties and rotas returned to Schedules Officer	TU / Schedules Officer
-5	Duties to production	Operations Support
-4***	Distribution of rotas and duties to garages	Schedules Officer / Garage management teams
0	Implementation	

*minimum notice to TU, no less than 6 weeks

**minimum notice to TU at garages, no less than 3 weeks

***minimum distribution at least 10 days in advance of service change

^ garage management teams will be able to view duties and rotas a couple of days before they are presented formally

\$ Minimum Tracker opening date

The above guide details a planned sequence of events in the lead up to a service change and covers all aspects relating to company and Trade Union actions.

