Guidance Document

G1393 Train Operator Shift Planning and Coverage

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1 Purpose

1.1 The purpose of this Guidance is to assist Trains management and administrative teams in maximising depot reliability and ultimately reduce Lost Customer Hours (LCH) caused by Operators Not Available (ONAs), by allocating duties to Train Operators in the most efficient way. It seeks to confirm and share existing good practice already being used by management and administration teams across the network.

2 Scope

2.1 The scope of this document is the processes involved in effectively managing shift planning and coverage of Train Operators' duties. The Guidance applies to Trains management and administrative teams, i.e. Train Operations Managers (TOMs), Train Operations Standards Managers (TOSMs), Duty Train Service Managers (DTSMs) and administrative staff working in train crew depots.

3 Guidance

All concerned (admin and management team)	**3.1 General** 3.1.1 In order to improve train service reliability, Train Operator availability needs to be maximised. Train Operators' duties are allocated on a weekly basis and published on the Thursday in advance of the week in question. However, it's important for depot teams to set up and manage all issues affecting availability for their depot as far in advance as possible. This involves planning 'known' activities as early as possible and minimising the frequency of making changes to these events, as far as practicable. 3.1.2 Note that in the following information, the term Train Operators also includes Instructor Operators. The term Duty Manager refers to TOSMs or DTSMs as appropriate; this will often be determined by champion roles at the depot.
Admin team	**3.2 Annual resource planning** 3.2.1 It is important to schedule as many activities as possible for each Train Operator for the year ahead, such as release for the Continuous Development Programme (CDP), periodic medicals and Trade Union (TU) release. 3.2.2 Make sure you undertake this planning activity after annual leave has been uploaded into SAP (usually October/November) and that, as far as possible, blocks of leave are evenly balanced across all leave periods. Ensure SAP is up-to-date and accurate. 3.2.3 Although dates for various activities may need to change throughout the year, scheduling them into the depot calendar at the start of the year will give an initial view of potential coverage issues. In this way, you will have as accurate a view as possible of availability over the year. Where potential coverage problems are identified, you must inform your TOM as soon as possible. 3.2.4 An appropriate time to do the SAP entries for CDP (dates permitting – see information overleaf), TU release or periodic medicals is often in the days between Christmas and New Year. First Aid refresher training should also be planned at this stage. 3.2.5 Continuous development programme (CDP) • You do not need to inform the Train Operators about their future CDP dates

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