Making an impact

Community transport in Greater Manchester

A reporting framework for monitoring & evaluation of the sector

Client – Greater Manchester Community Transport Operators' Forum

ct transport for communities

the community transport experts

Contents

1 Key points

1.1 The Greater Manchester CT sector overall

The CT sector in Greater Manchester (GM) is larger, and more diverse, than might be expected.

With a turnover just short of £3.8 million, the sector provided 537,237 trips to Greater Manchester residents in the year 2007-2008 and covered over 2.8 million kilometres in doing so.

Group transport has been referred to the "hidden third" of CT activities. The findings of this collection exercise indicate that it is indeed a significant and unrecognised element of CT activities in Greater Manchester – providing 252,398 passenger trips (47% of the total), it is closer to a "hidden half".

158,266 (29% of the total) trips were carried out under contract to public authorities. It is believed (but not currently verifiable) that the vast majority of these were under contracts with GMPTE.

The remaining 24% (126,573 trips) were accounted for by CT-operated individual passenger transport projects, such as Dial a Ride, Car schemes and Shopper Services.

The sector also provides other related service in addition to minibus-based provision. One operator provided over 2,500 Shopmobility hires. Another provided nearly seven thousand trips, taking sick children to hospital appointments they otherwise would not have been able to attend.

1.2 Contribution of community transport to Government objectives.

Research[1], commissioned by the Department for Transport and published in 2007, identified the relevant contributions that CT could make to objectives set by Government for the Department for Communities and Local Government (DCLG), Department for Education and Science (DFES) and Department for Transport (DfT).

It is clear that CT in Greater Manchester is making contributions in all the identified areas.

1.3 Added value - economic impact

With a **turnover of £3.8 million**, and the **provision of over 140 jobs**, the GM CT sector clearly has a considerable economic impact.

In addition:

If volunteer hours were to be costed at the same rate as a casually-employed driver - £6.50 per hour – this represents a **contribution by volunteering of nearly £190,000**.

During 2007-2008, the GM CT sector contributed significantly to workforce skills, within a sector where there are acknowledged skills shortages. CT operators **trained over five hundred drivers** (both volunteers and paid employees) to nationally-recognised MiDAS standards.

1.4 Added value - social impact

National and local policies identify five key activity areas (employment, education, healthcare, fresh food shopping and social and cultural). Inability to access these

[1] "Using Community Transport to Reduce Social Exclusion - a report to Department for Transport 2007"; TAS Partnership

key areas of daily life, due to lack of access to transport, will result in groups or individuals becoming marginalised and socially excluded.

With the proviso that more data is required to give a completely accurate picture, both transport services for individuals and for groups would seem to make a significant impact on these areas of daily activity.

It is clear that individual transport is having a considerable impact on access to three key areas of activity – **Employment** (36% of individual trips), **Education** (32% of individual trips) and **Healthcare** (20% of individual trips).

It is also clear that group transport is having a considerable impact on access to two key areas of activity: **Social & Cultural** (54% of group trips) and **Education** (34% of group trips).

It is clear that, despite the national trend of decreasing volunteering, **volunteer input accounts for a considerable proportion (nearly 80%) of the driver resources** available to the Greater Manchester CT sector.

In addition to the economic contribution that volunteering makes to society, **volunteering** also **makes a valuable social contribution**. On an individual basis, it can also help to improve self-esteem and social skills and provide a route into, or a means of return to, employment.

1.5 Added value - Environmental impact

The CT sector made over half a million individual passenger journeys during 2007-2008. There are no indicators available to determine how many of these journeys would have been made by car, had CT not been available. Indeed, it might be argued that some research to estimate this would be considered useful.

Assuming a 75% loading factor (eight passengers, which may be conservative) for CT vehicles, compared with a 100% loading factor (four passengers, which may be optimistic) for a car, some rough calculations, in relation to group transport at least, can be made.

Every journey (comprising eight individual trips) in a CT vehicle could therefore result in a saving of at least one car journey. Using the indicative figures for 2007-2008 (252,398 group trips), it can be seen that **CT could have saved over thirty one thousand car journeys**.

1.6 Cost per trip

Social Needs Transport (SNT) is, by the nature of its having to adapt to meet the individual, variable and often considerable needs of its passenger groups, a very resource-intensive activity. The bespoke nature of many aspects of the services it provides makes it difficult to achieve the economies of scale seen with mass-transit solutions.

Aggregated and averaged cost per trip, when applied to provision, is therefore a crude comparative measure when applied to such transport.

However, it has been used as a broad indicator by many authorities.

It is beyond the remit of this report to identify individual operators' average cost per trip, as this would be considered commercially sensitive information.

If the figure of £8 cited in the research[2] carried out by TAS Partnership for DfT is used as a benchmark cost per trip, it can be seen that, even with a crude average

[2] "Using Community Transport to Reduce Social Exclusion - a report to Department for Transport 2007"; TAS Partnership

cost of £7.06, the CT sector in Manchester could be saving at least £500,000 against the benchmark cost of providing such trips by publicly funded Dial a Ride.

1.7 Subsequent data collection

At the core of this piece of work was the intention that this data collection exercise should be repeatable, year on year. This would enable both the collection of comparative data, and the implementation of refinements and adjustments found necessary during the initial collection phase.

Although the data gathered was comprehensive, the forum and other stakeholders need to work to ensure that additional data (particularly with regard to journey purpose and passenger/group profiles) is available in subsequent years.

2 Terms used in this report

2.1 Acronyms & abbreviations

Acronym	Explanation
BSOG	Bus Service Operators Grant. Formerly known as Fuel Duty Rebate – a rebate of duty paid on fuel for certain eligible types of trip.
CT	Community transport
CTA UK	The Community Transport Association UK
CTO	Community transport organisation/operator
DCLG	Department for Communities & Local Government
DFES	Department for Education & Science
DfT	Department for Transport
DNA	"Did not Attend" – health service acronym for a missed appointment
DRT	Demand Responsive Transport – transport service that adapts its route or other service attributes to meet changing passenger demand
GMPTA	Greater Manchester Passenger Transport Authority – the authority with overall statutory responsibility for transport within the ten districts of Greater Manchester.
GMPTE/PTE	Greater Manchester Passenger Transport Executive – the executive arm of GMPTA
MiDAS	Minibus Driver Awareness Scheme
SSA	Standard Spending Assessment

2.2 Defining community transport

Community transport began over three decades ago as an innovative solution to community needs.

Today, CT in Greater Manchester retains that core ethos in its aims of:

- developing and sustaining communities
- combating social exclusion
- promoting economic regeneration
- attempting to minimise environmental impact.

The Forum's definition of the term community transport reflects the breadth of such an ethos:

> "any transport service, which is designed, specified, controlled, or otherwise developed by the communities it serves, and which is provided on a not-for-profit basis in direct response to the identified needs of those communities."

Such services may either be provided directly by local Voluntary & Community Sector (VCS) groups, or by statutory or commercial agencies under the direction, funding or control of such communities.

Statutorily run services, such as Social Services Day Centre Transport, or Non-emergency Passenger Transport are therefore not considered as community transport. Commercial providers (such as commercial bus & coach operators or taxi companies) also fall outside this definition.

2.3 Community Transport Organisations

Community Transport Organisations (CTOs) possess a number of attributes, which distinguish them from other transport operators.

- CTOs can be **Social Enterprises** or not for profit **charities**, providing safe, accessible and affordable transport solutions to their local community.
- CTOs are **community-owned** and managed, by management committees elected by and from local people.
- They remain **independent** of private or public organisations
- Any **surplus** generated **is re-applied to the enterprise**; never distributed to shareholders or directors.

2.4 The key test

The key tests of whether a service or an operator is or is not a CTO are therefore the presence of local control, independence and not-for-profit status.

Although statutory or commercial operators cannot be considered to be CTOs, services provided by statutory or commercial operators under contract to CTOs or other VCS groups may be considered as community transport, as they are under the direct control of a locally owned and independent not-for profit group.

3 The Brief

The following is reproduced from the client's project brief.

3.1 Introduction

GMCTOF have been requested by GMPTE to introduce a standardised reporting package for members that captures significant data to illustrate the impact that the CT sector has within Greater Manchester Transport.

GMPTE require this information in order to illustrate and support the journey statistics generated. It is estimated that of the funding currently provided to the CT sector via grants and DRT contracts only 60% can be evidenced. Without a suitable body of evidence to support claims it is likely that:

a) funding will be placed under severe pressure, and
b) the true value of the work undertaken by the CT sector will not be captured.

The reporting framework will need to build on the existing CT Trust reporting form, collecting the individual passenger data at registration and subsequent trip data. The framework must illustrate the social impact of individual journeys as well as the financial implications in order to prevent CT being assessed purely on a price per mile basis.

3.2 Requirements

GMCTOF Ltd wish to contract an Independent Consultant to construct a robust reporting framework that will enable each member CT to report the same statistics to GMPTE in a confidential manner.

The information recorded should be relevant and useful to the CT's individually without being onerous to collate. It is envisaged that quarterly reporting will be the benchmark standard and forum members will be expected to submit data in a timely fashion to highlight the professionalism available within the sector.

It is expected that the Consultant selected will :-

- Carry out an independent review of member organisations to assess what data is currently available.
- Create a reporting structure that caters for both Group and Individual Activity
- Liaise with GMPTE to establish current data recording and avoid duplication
- Establish a common framework for reporting together with a suitable method of delivering this to the collating body that may be either TRU, GMCVO or GMPTE
- Establish a Summary of results that provides a single page report supported by the detailed data submitted
- Suggest an array of Key Performance Indicators that could be used to monitor and evaluate performance
- Establishes criteria that highlight the value generated by the CT sector to third parties ie.
  - Evidences the value of DNAs to health agencies where transport may be a barrier to attendance
  - Recognises any formulae components in the SSA calculations that affect local government where transport improvements may increase funding settlements

- Provides CTs with base information that they may also use to highlight cross sector benefits to a wider audience such as Local Authorities, PCTs Learning Skills Partnerships
- Records the percentage on non public sector funding attracted by an organisation

3.3 Commentary

All tasks contained within the brief were undertaken.

However, it has not proved possible to evidence the value of DNAs to health agencies where transport may be a barrier to attendance, as the Health Sector does not record such data.

Further work is needed to establish such data. It is understood that developing links with health is a key component of future GMCTOF work. It is therefore suggested that establishing figures for the cost of DNAs be included as a priority within such work.

Further work will also be needed in identifying formulae components of the SSA calculations.

3.4 The research team – Transport for Communities

Following a competitive tendering exercise, Transport for Communities was commissioned to undertake the work.

Transport for Communities is a Voluntary Sector development consultancy, specialising in community transport.

It provides services in the following areas:

- Research & feasibility
- Development support
- Organisational review
- Business planning
- Funding applications
- Staffing & recruitment

4 Methodology

4.1 Organisations to be surveyed

It was agreed with the client that thirteen CT operators should be included in the data gathering exercise:

- Bolton Community Transport & Furniture Services
- Community Transport Manchester
- EasyGo/Stockport Community Transport
- East Manchester Community Transport
- Heywood New Heart Community Transport
- Manchester Community Transport
- Oldham Community Transport
- Point 2 Point Community Transport
- PACT (Partington and Cadishead Transport Co-operative Limited)
- Rochdale Community Transport
- Salford Community Transport
- Transport for Sick Children
- Wigan Community Transport

4.2 Approach

Researchers were concerned that simply providing a matrix for data collection and analysis would not result in comprehensive data collection and robust analysis of impact.

Researchers therefore intended not only to design the data collection/analysis framework, but also to collect the information.

This would enable identification of potential difficulties and adjustment of the framework to accommodate these.

In the case of longer-term/systemic difficulties with data type or consistency, researchers would also be able to recommend solutions.

4.3 Consultation & development of collection/analysis framework

Initial framework

The TfC data collection framework was modified to meet the needs of the project after consultation with both the GMCTOF Board and GMPTE officers.

Data CTs said they collected

Researchers had interviewed each CT operator by telephone to ascertain:

- What data they currently collected
- Of the data which they did not collect, whether collection would be feasible

Collection framework

Using the results of interviews about the information operators already collected, and the experience of trialling the data collection framework developed from these, a final data collection framework was developed.

4.4 Collection visits

Appointments were then made to visit all operators, apart from Point 2 Point CT (researchers were advised that data would not be available) and East Manchester Community Transport (whose data would be incorporated within that of the MCT group).

A list of data required was circulated in advance of each interview, to enable operators to prepare.

The final collection framework was used to record data.

All visits were completed as planned by June 6th.

A copy of their own data was sent to each operator for verification

4.5 Data availability disparities

Although it was envisaged that a complete set of data would be collected on each visit, a disparity was found between the data operators said they recorded, and the data they could actually supply.

Some follow-up collection therefore proved necessary.

4.6 Sustainability of the framework & analysis

The data collection framework has been designed to accommodate, and provide comparative information for, a further two years' data.

4.7 Data analysis

Custom-made analysis tools were developed to provide cumulative and comparative information, which would present an overall picture of the sector and its activities

5 The data

Of the thirteen operators, one was found to be such an integral part of its "parent" that separate statistical returns were not possible to collect.

This left twelve organisations to respond. Of these, data was unavailable from one.

5.1 Data available

The aspirations for, and expectations of, this project would always be mediated by three key factors:

1. The range of data individual CT Operators collect
2. the sophistication or otherwise of their collection methods
3. The time they have available to devote to such an exercise.

The original aspiration, to collect a complete set of data from every operator, has proved impractical.

In some cases, raw data is held in files/diaries which CTs do not have the resources to collate; in others, operators simply do not record the data

However, CT operators have cooperated wholeheartedly with this process, devoting valuable time and effort to ensure that the maximum amount of available data was supplied.

Researchers are therefore confident that a comprehensive amount of data has been gathered.

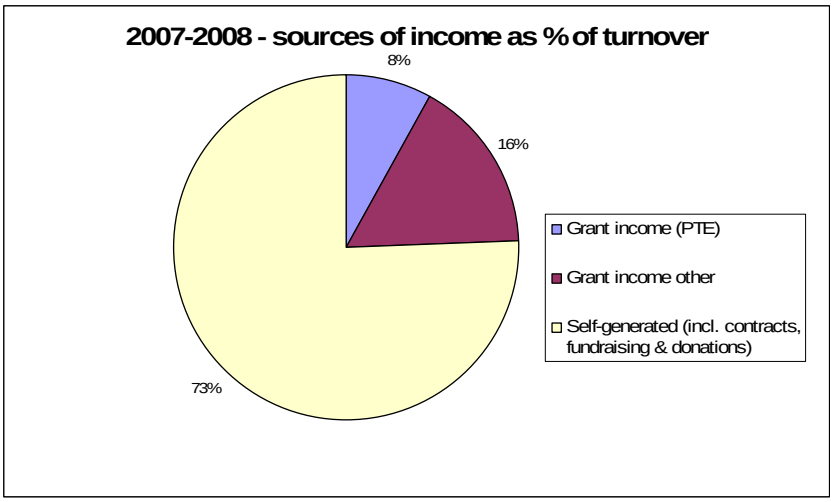
It is also clear that the experience of actually collecting the data, rather than simply developing a framework for use by the Forum, has produced both a robust analysis tool, along with the knowledge of what GMCTOF needs to change to ensure more complete data capture in subsequent years.

5.2 Financial

The table below shows data about sources of income for the sector

Financial	Totals	% of turnover
Annual turnover	**£3,791,305**	**100%**
Grant income (PTE)	**£300,402**	**8%**
Grant income other	**£599,483**	**16%**
Self-generated (incl. contracts, fundraising & donations)	**£2,891,420**	**76%**

The data, presented below as a pie chart, shows that the CT sector as a whole generates nearly three quarters of its income from contracts, fundraising and other activities.



Income from contracts includes those with Local Authorities (Education, Older People) Health and GMPTE contracts, such as DRT.

It is hoped, in future collection of data, to be able show both the amount and relative percentage of income arising from contracts awarded by GMPTE. These figures were not available at the time of collection.

5.3 Employment

The table below shows data about employment created or maintained by the sector.

Employment	Totals	not applicable	not collectable	Valid count
Jobs created or maintained (ft more than 30 hrs)	102	1	1	11
Jobs created or maintained (pt less than 30 hrs)	42	1	1	11

The sector has created and maintained nearly 150 jobs in the financial year 2007-2008

5.4 Volunteers & drivers trained

The table below shows both the number of volunteers and the contribution they made.

It also shows the number of drivers trained during the period, and the total number of drivers registered.

Volunteers	Totals	not applicable	not collectable	Valid count
Number of volunteer drivers	727	1	1	11
Number of other volunteers	38	1	1	11
Volunteer hours	12,128	1	7	5
Number of drivers trained during period	584	1	2	10
Number of drivers registered (paid & unpaid)	918	1	2	10

Contribution of volunteers

Only five operators currently keep a record of volunteer hours. For these operators, volunteers contributed over 12,000 hours in the period.

If volunteer hours are costed at the same rate as a casually employed driver - £6.50 per hour – this represents a contribution of nearly £80,000 per year. If the figures

are extrapolated to estimate the contribution for all twelve operators, the figure rises to nearly £190,000.

	rate p/h	hours	input
five schemes	£6.50	12,128.00	£78,832
twelve schemes	£6.50	29,107.20	£189,197

It is clear that, despite the national trend of decreasing volunteering, **volunteer input accounts for a considerable proportion (79%) of the driver resources** available to the Greater Manchester CT sector.

Drivers

Nearly six hundred drivers were trained in the sector during the period. However, the actual figure is likely to be higher, as two operators were unable to give these figures.

There were over nine hundred drivers registered in the sector. Over seven hundred of these were volunteers.

5.5 Training provided in year (numbers trained)

The table below shows the actual number of people trained over the period.

Only seven schemes provided data in response to this question.

Training provided in year (numbers trained)	Totals	not applicable	not collectable	Valid count
Customer care/disability awareness	1	1	4	8
Fire & Evacuation	0	1	4	8
First Aid	15	1	4	8
Health & safety	1	1	4	8
Manual handling/lifting	0	1	4	8
Midas	517	1	4	8
Midas DATS	1	1	4	8
Midas Pats	0	1	4	8
PCV driver training	6	1	4	8
Volunteers forums	96	1	4	8
Other training	51	1	4	8

5.6 Usage

Definition of a trip

A trip is analogous to a passenger journey - defined as a one-way journey for one passenger.

Therefore, a fourteen-seat minibus travelling with a full passenger load to a single destination would be undertaking fourteen passenger trips.

The sector provided 537,237 trips to Greater Manchester residents in the year 2007-2008

The table below shows a breakdown of this figure, along with related usage statistics.

Overall fleet mileage (in km)

Ten operators were able to give figures for total fleet mileage, and overall trips for individuals.

Overall trips – individuals

These are trips provided and booked for an individual, undertaken as part of a CT-operated project, such as Dial A Ride or shopping services.

This category excludes trips undertaken under contract.

Overall trips – Contracts

These are trips undertaken under contract, most often with a local authority (for education or adult services), or GMPTE (for example, DRT services)

Overall trips - PTE contracts

It was hoped to be able to subdivide contracted trips further, using trip statistics from GMPTE.

Technical limitations of scheduling software have prevented the supply of figures for the current period. However, it is hoped that such figures will be available for subsequent years' collection.

Overall trips – groups

This is the traditional activity of CT – transport for community and other groups.

Shopmobility Hires

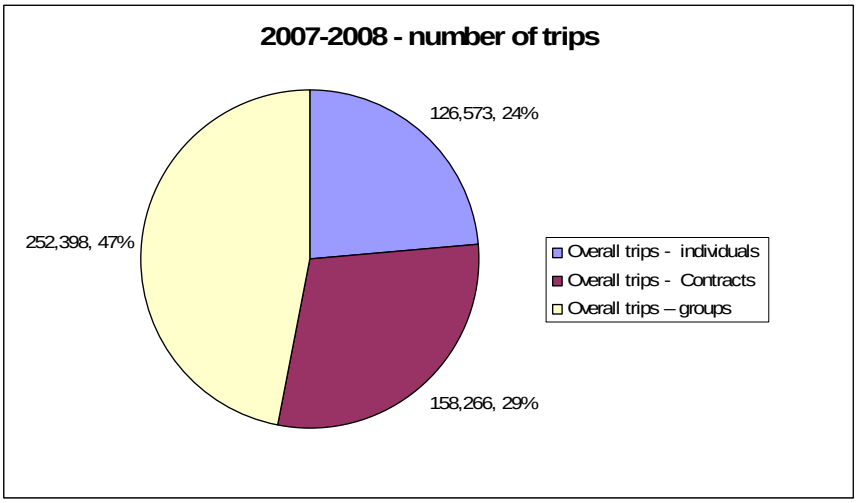
One operator also provides a Shopmobility service.

The table below enumerates the key transport-related activities of the CT sector.

Usage	Totals	not applicable	not collectable	Valid count
Total fleet km	2,841,054	1	2	10
Overall trips - individuals	126,573	2	1	10
Overall trips - Contracts	158,266	4	1	8
Overall trips - PTE contracts	0	13	0	0
Overall trips – groups	252,398	2	1	10
Shopmobility Hires	2,597	11	1	1
Equipment (Scooters)	30	11	1	1

Data for number of trips delivered under PTE contracts was not available.

The chart below shows the relative split between individual, group and contracted trips



5.7 Trip purpose

Trip purpose can be linked to national, regional and local social, economic or environmental objectives, and therefore to funding available to organisations that help authorities meet such objectives.

In order for CT to be able to demonstrate its contribution in this way, some indication of either trip purpose or passenger category (for individual trips), or group activity/type is needed.

It was hoped that operators would record, and be able to supply, details of the type of trips made.

However, trip purpose is not currently consistently collected for either group or individual travel.

Operators delivering services under contract did not record trip purpose. The GMPTE call centre is unable to provide this information at the moment, although it is understood that this data may be available in subsequent years.

Urgent consideration should be given to a mechanism for enabling all GMCTOF operator members to record trip purpose in a consistent and easily measurable manner.

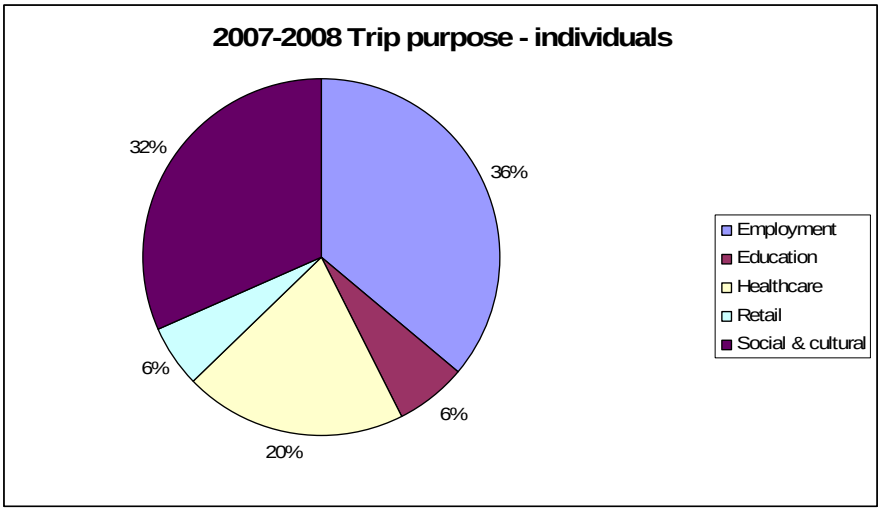
This in turn would depend on the introduction of consistent post-trip reporting, and again would probably need some "hands on" support with operators to help them develop consistency in collection.

5.8 Trip purpose - individuals

Five operators from a potential twelve were able to supply data about trip purpose for individual trips. The table below shows the relative numbers. The number of trips allocated here represents 70% of total individual trips reported.

Trip purpose individuals	Totals	not applicable	not collectable	Valid count
Employment	31,964	1	7	5
Education	5,635	1	7	5
Healthcare	18,020	1	7	5
Retail	5,042	1	7	5
Social & cultural	28,069	1	7	5

While the pie chart below shows the percentage distribution:



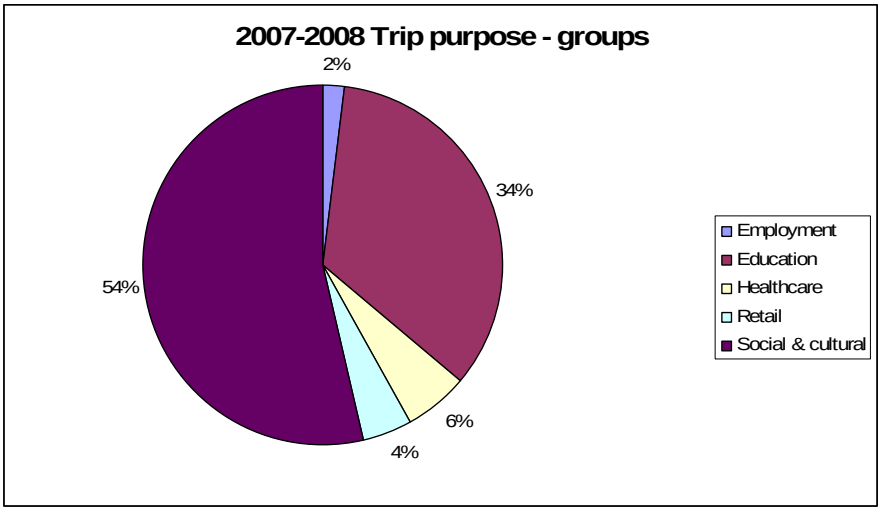
With the proviso that more data is required to give a completely accurate picture it is clear that individual transport is having a considerable impact on access to three key areas of activity – **Employment** (36% of individual trips), **Education** (32% of individual trips) and **Healthcare** (20% of individual trips).

5.9 Trip purpose - groups

Five operators from a potential twelve were able to supply data about trip purpose for group trips. The table below shows the relative numbers. The number of trips allocated here represents 64% of total group trips reported.

Trip purpose groups	Totals	not applicable	not collectable	Valid count
Employment	2,934	2	6	5
Education	55,413	2	6	5
Healthcare	9,448	2	6	5
Retail	7,121	2	6	5
Social & cultural	86,769	2	6	5

The pie chart below shows the percentage distribution:



With the proviso that more data is required to give a completely accurate picture, it is clear that group transport is having a considerable impact on access to two key areas of activity: **Social & Cultural** (54% of group trips) and **Education** (34% of group trips).

5.10 Group transport – types of user groups

Group transport has been referred to the "hidden third" of CT activities. The findings of this collection exercise indicate that it is indeed a significant and unrecognised element of CT activities in Greater Manchester.

However, in order for CT to be able more clearly to demonstrate its contribution, some indication of the types (i.e. activity/purpose) of group it is serving is essential. This, again, can then be linked to economic, social or environmental policies as in Trip Purpose above.

Unfortunately, only one operator could provide reliable data about the types of group it served.

Discussions held during collection of data suggest that the initial "long list" of group types is not useful. Some booking, scheduling & despatch software, for example, uses a smaller number of categories which are assigned as a journey purpose to group travel.

This should be a priority area for discussion and decision by GMCTOF. It is suggested that a shorter list be discussed, agreed and adopted, along with an approach for ensuring groups are actually categorised.

Possible headings might include:

- Education
- Employment
- Health
- Recreation/leisure
- Shopping
- Social
- Social Welfare
- Training

This list may easily be subdivided into the five key areas of Employment, Education, Healthcare, Retail and Social & cultural

This discussion should aim to include producing a clear and unambiguous decision about the distinction between group type (i.e. what a group does, or is set up to do) and journey purpose (i.e. the types of journeys it makes), and whether both are necessary.

There will be a need for some "hands on" development work with individual operators, to ensure they are in a position to record and supply the right sort of information.

5.11 Services provided

The table below shows the range of services provided by operators in the Greater Manchester CT sector.

Services provided	Valid count	%
Minibus services		
Group transport	11	100%
Individual door-to-door services	10	91%
Community Buses	0	0%
Contracted Services		
Demand Responsive Transport	8	73%
Home to school transport	5	45%
Social Services day centre transport	3	27%
Non-emergency Patient Transport	0	0%
Other transport services		
PSV services	1	9%
Community Car Services	1	9%
Goods vehicles	0	0%
Recycling		
Furniture recycling	2	18%
Community recycling projects	1	9%
Other services		
Vehicle brokerage & management	0	0%
Wheelchair loan & Shopmobility	1	9%
Wheels to work & scooter commuter	0	0%

Group transport

As would be expected, all respondents apart from one (which is a volunteer car scheme) provide Group Transport – the activity with which community transport began over thirty years ago.

Individual door-to-door services

Over ninety percent of respondents operate some sort of Individual door-to-door services. This would include activities such as Dial a Ride and Shopper Services, as well as door to door DRT services.

Community Buses

None of the respondents currently operate Community Buses

Demand Responsive Transport

Over seventy percent of respondents operate Demand Responsive Transport

Home to school transport
Forty five percent of CTs operate home-to-school transport services

"Social Services" day centre transport
Three CTs operate Social Services day centre transport. However, the nature of local authority provision has changed, with former social services departments being reorganised, and a move towards changing the nature of day care. This will probably mean closure of day centres and the relocation of day care to a more community based provision. Clients will still, however, need transport to such facilities.

Non-emergency Patient Transport
There are no CTs currently operating commissioned patient transport services, despite the considerable potential for benefits to patients and commissioners, which CT could bring in terms of flexibility and innovation.

This is probably a reflection of two issues: the health sector's general lack of knowledge about CT, and lack of appreciation of the key role of transport in access to health services.

However, it is clear that CT is making an important contribution to healthcare, albeit at no cost to the health sector, via the 20% of individual trips described as healthcare-related.

PSV services
One CT currently operates services under a PSV Operator's licence

Community Car Services
One respondent is solely a community car scheme

Goods vehicle hire
No CTs provide goods vehicles for use by local groups

Furniture recycling
Two projects provide furniture recycling facilities.

Community recycling projects
One project provides a community recycling service – mainly for white goods

Vehicle brokerage & management
No CTs provide vehicle brokerage & management for local groups

Shopmobility & wheelchair loan
One project includes a Shopmobility scheme.

Wheels to work & scooter commuter
No CTs provide wheels to work or scooter commuter services

5.12 Software used to record/analyse post-trip data

The table below shows the various methods used to record and/or analyse post-trip data.

Access	CT 2000	Excel	Manual	Mobisoft	Trapeze	Bespoke	n/c
2	3	1	1	1	3	1	1

It can be seen that here is little consistency in the software or method used to record and analyse post-trip data.

This makes collation and comparison of like-for-like data more onerous than it need be. However, discussions with individual operators reveal it to be unlikely, and unrealistic to expect, that operators will adopt a common system in the short or medium term.

What is needed is a consensus about what data is needed effectively to judge the activities and impact of the sector. The collection exercise for the present report has established such a consensual baseline.

The next step is to facilitate and support those operators that need it to be able to collect and collate the data that is needed in time for subsequent years' collection exercises.

This will require some hands-on support work with individual operators.

5.13 BSOG

It must be acknowledged that the categories for BSOG-eligible passengers might lead to a slightly inaccurate picture of passenger profiles – a passenger may fall into more than one category, but can only be counted once.

Nevertheless, it was hoped that BSOG returns would give some sort of picture of passenger profiles.

BSOG Passenger numbers/types	Totals	not applicable	not collectable	Valid count
a) persons who have attained the age of 60 years;	47,698	3	4	6
b) disabled persons*;	23,325	3	4	6
c) persons in receipt of income support	0	3	4	6
d) persons in receipt of jobseeker's allowance	0	3	4	6
e) persons suffering a degree of social exclusion	60	3	4	6
f) persons who believe that it would be unsafe for them to use any public passenger transport services	0	3	4	6
g) carers or persons under 16 years of age accompanying any of the foregoing.	837	3	4	6
Non-BSOG passengers	37,589	3	4	6
Total eligible km	752,156	3	3	7
Total ineligible km	453,463	3	3	7

However, as only six operators (out of eleven that would probably be eligible) were able to supply BSOG figures, it is not possible to draw reliable conclusions from this data.

Researchers were surprised to find that a number of eligible operators were not registered to claim BSOG. As claims can be made retrospectively, it is considered that this would be a worthwhile course of action, resulting in an extra income stream from rebates on fuel duty.

This would have the additional benefit of providing a better overall picture in subsequent years.

5.14 Professional competencies

The table below shows data about key professional competencies. These are linked to baseline standards set by the Forum for the sector.

Professional competencies etc (number held)	Totals
CPC operations manager	17
CPC drivers	0
MiDAS DAT in post	13

All but two operators have a CPC holder in post.

One of these is an integral part of a larger group. Responsibility for operations therefore lies with CPC holders of the group.

No data was forthcoming from the other.

5.15 Governance

Type of organisation

Six of the CT operators were part of a larger organisation. One of these is an integral part of its parent. Separate data was not therefore available for this operator.

Governance	Yes	No	not applicable	not collectable
Part of larger organisation?	6	7	0	0
Companies house Webcheck				
Company accounts up to date	6	0	6	1
Annual return up to date	6	0	6	1
Charity Commission - register of charities				
Annual return up to date	4	1	5	1
Other				
Minutes book present	7	0	4	2
register of members present	7	0	4	2
register of directors present	7	0	4	2
Registers etc format	0	0	5	0
date of next General Meeting	3	5	3	1

Annual returns

The records of both Companies House and the Charity Commission were checked to ensure that Annual Returns and Accounts had been filed and were up to date.

Two organisations were Industrial & Provident Societies (IPS), and although there is a record of their existence on the Companies House website, they are not obliged to make returns to Companies House. IPS are regulated by the Financial Services Authority.

An IPS, as an exempt charity, is exempted from making returns to the Charity Commissioners.

It should be noted that there is absolutely nothing untoward in having the legal form of an IPS; this was the preferred legal form for CT operators established prior to 1990.

Companies house Webcheck

Company accounts were up to date for six organisations, from a total of six liable to make returns

Annual return was up to date for six organisations, from a total of six liable to make returns

Charity Commission - register of charities

Annual return up to date for four organisations, from a total of five liable to make returns.

Other

Researchers enquired about the presence of the following legally required registers.

- Minute book
- Register of members
- Register of directors

All respondents declared the presence of these.

Date of next General Meeting

Three respondents had set a date for their next General meeting

Commentary

From interviews and inspection of publicly-available records, it would seem that CT operators are generally following good practice in terms of constitution (all are incorporated organisations) and making statutorily-required returns.

6 Issues & recommendations

6.1 Incomplete datasets

GMCTOF should make a concerted effort to support and enable its member organisations to collect and collate complete datasets for the 08/09 collection round.

6.2 Incompatible data & lack of uniformity

It is recognised that achieving uniformity in post-trip collection and analysis software is unlikely without considerable investment.

Nonetheless, GMCTOF should make a concerted effort to support and enable its member organisations to collect and store the data required for subsequent collection rounds in a form that will enable consistent analysis.

6.3 Trip purpose

Urgent consideration should be given to a mechanism for enabling all GMCTOF operator members to record trip purpose, both for individual and group trips in a consistent and easily measurable manner.

As well as CT operators, this will require action from those responsible for booking and scheduling DRT trips undertaken by CT operators.

6.4 Passenger type

Although it is difficult to record, some effort must be made to begin to record passenger profiles (albeit with due regard to privacy and confidentiality issues).

The majority of this effort will need to be concentrated on individual trips, and therefore on DRT contracts, where the responsibility for booking, scheduling and despatch lies with the contracting authority.

This would enable the sector to present more detailed information about the types of passengers it is carrying, and allow comparison against social and economic objectives.

6.5 BSOG data

While BSOG data can be misleading, it can give an overview of passenger types.

Researchers were surprised to find that a number of eligible operators were not registered to claim BSOG. As claims can be made retrospectively, it is considered that this would be a worthwhile course of action, resulting in an extra income stream from rebates on fuel duty.

6.6 Group type

Categorisation of group types should be a priority area for discussion and decision by GMCTOF. It is suggested that a shorter list be discussed, agreed and adopted, along with an approach for ensuring groups are actually categorised.

The Forum should discuss, and agree on, a simplified framework that can be used by member CTs for allocation of groups.

Efforts must then be made be made to record group type (i.e. primary purpose/activity) for each CT's group members. This will require some hands-on support work with individual operators.

6.7 Cost per trip

Social Needs Transport (SNT) is, by the nature of its having to adapt to meet the individual, variable and often considerable needs of its passenger groups, a very resource-intensive activity. The bespoke nature of many aspects of the services it

provides makes it difficult to achieve the economies of scale seen with mass-transit solutions.

Aggregated and averaged cost per trip, when applied to provision, is therefore a crude comparative measure when applied to such transport.

However, it has been used as a broad indicator by many authorities.

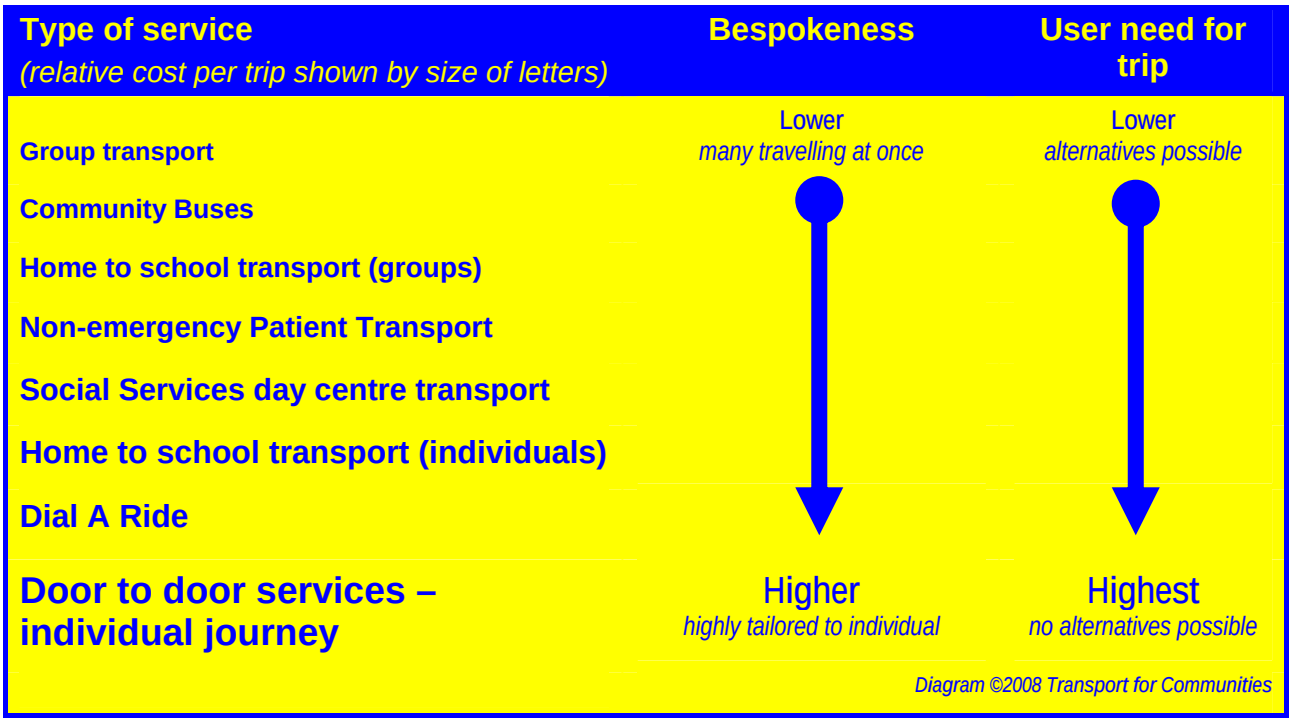
6.8 Range of costs per trip

It is beyond the remit of this report to identify individual operators' average cost per trip, as this would be considered commercially sensitive information.

However, the most highly bespoke services' *(those dealing with specialised door to door transport for individual passengers who would have no other alternative)* cost per trip outweighs that of other operators by a factor of up to five.

This may seem excessive, until the factors involved are carefully considered. An example of this would be a trip for a person using a large electric wheelchair, who cannot transfer and whose journey does not fit "popular" travel patterns, and who requires a return journey. Such a trip can tie up a vehicle and driver for half a day, but if it were not provided by a CT operator, it is unlikely that the trip could be made.

The figure below attempts to depict the relationship between the degree of "bespokeness" and relative resource requirements.



Comparison with national benchmark costs

The "Valuing CT" research[3] carried out by the TAS Partnership for DfT, in attempting to value the contribution of CT nationally, assumed a notional unit cost of £8 per trip for trips carried out by "publicly funded Dial a Ride".

A crude average calculation (total turnover/trips delivered) indicates that CT in Greater Manchester delivers its services at a cost of £7.06 per trip.

[3] "Using Community Transport to Reduce Social Exclusion - a report to Department for Transport 2007"; TAS Partnership

If the operators delivering the most highly bespoke services are removed from the calculation, the average cost per trip reduces to £6.02, with 60% of the remaining operators averaging less than £5 per trip.

Potential cost savings

If the figure of £8 cited in the TAS research is used as a benchmark cost per trip, it can be seen that, even with an unrealistic average cost of £7.06, the CT sector in Manchester is saving at least £500,000 against the benchmark cost of providing such trips by publicly funded Dial a Ride.

6.9 Future collection & analysis

What was needed was a consensus about what data is needed effectively to judge the activities and impact of the sector. The collection exercise for the present report has established such a consensual baseline.

The next step is to facilitate and support those operators that need it to be able to collect and collate the data that is needed in time for subsequent years' collection exercises.

There will be a need for some "hands on" development work with individual operators, to ensure they are in a position to record and supply the right sort of information.

7 Appendix 1 - community transport services

Community transport operators in the UK provide a wide range of services. Although, in the main, these are focused on transport, there is considerable diversity in the methods, which CT uses to help meet its objective of promoting social inclusion and economic growth.

Examples of the wide variety of services CTs can provide include:

7.1 Minibus services

- Shared transport for a wide range of community groups, from under 5s groups to over 60s clubs.
- Individual door-to-door services for passengers who find it difficult or impossible to use mainstream transport. For example, Dial A Ride.

7.2 Brokerage & management

- Vehicle management services for other community organisations, ranging from simple bookings administration to complete management.

7.3 Community Buses

- Regular, timetabled bus services with volunteer drivers. Forthcoming legislative changes may widen the scope of such services to allow the use of paid drivers.

7.4 Community Car Services

- Door to door transport for individuals using volunteer drivers, either with their own CT-owned cars or people carriers, for passengers who cannot use public transport.

7.5 Recycling

- Furniture recycling collection and redistribution of household goods.
- Community recycling projects.

7.6 Training

- To nationally accredited MiDAS (Minibus Driver Awareness Scheme) standards, for drivers and passenger assistants.
  MiDAS driver assessor/trainers assess drivers to ensure their driving skills are of high standard and provide training on legal, safety and disability issues and on specialist equipment. Over 50,000 drivers have already been trained to the MiDAS standard.

As social enterprises, CTs are in an ideal position to provide community-based solutions to the transport needs of statutory authorities and their clients. CTs in Greater Manchester deliver a large percentage of DRT services, under contract to Greater Manchester Passenger Transport Executive.

7.7 Demand Responsive Transport

- Services for the public, which adapt their itinerary and timetable to suit a particular transport demand. These use professional, paid drivers, operating minibuses or smaller vehicles such as people-carriers.

7.8 Education Transport

- For example, individual journeys to and from school for pupils with Special Educational Needs.
- Transport for groups of pupils to extra-curricular activities.

7.9 Mainstream bus services

- A number of larger CTs now operate main routes for regional transport authorities.

7.10 Patient transport

- CTs in various parts of the country provide non-emergency passenger transport under contract to health authorities and trusts.

7.11 Social Services Transport

- Door-to door transport for elderly or disabled clients of local authorities.

8 Appendix 2 – contacts

For further information about the research, interested parties may wish to contact the following.

8.1 Greater Manchester Community Transport Operators' Forum (GMCTOF)

GMCTOF may be contacted via the Transport Resource Unit (TRU) of Greater Manchester Council for Voluntary Organisations (GMCVO).

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8.2 Greater Manchester Passenger Transport Executive (GMPTE)

The relevant officer at GMPTE is:

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8.3 Transport for Communities

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