

Setting up a community transport scheme in Dorset

Guidance and Toolkit 2019



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Foreword

Dorset Council has produced this guide to help rural communities develop different transport solutions tailored to the needs of the residents, enabling access to many essential and leisure services. There is already a wide range of schemes in the county, from car-sharing to community minibuses. This guide will help communities to decide which option best suits their needs and to understand how schemes can be implemented.

Dorset Council has put in place some resources to help community groups; these include working with Dorset Community Action, the Volunteer Centre Dorset and Citizens Advice in Dorset to focus on Community Transport to see how best to help initiatives succeed.

Links with local transport action groups and parish council transport representatives are also available to help consider various transport solutions. Dorset Council is also looking at how transport can be made available to Dorset residents in the future by using and adapting a range of its existing services.

Councillor Ray Bryan, Cabinet Member for Highways, Travel and Environment, said:

“In June 2019 Dorset Council declared a Climate and Ecological Emergency. As part of the work done to date we identified public transport as being an essential way of getting people out of cars onto buses. By working alongside communities, we are taking a major step to become carbon neutral by 2040.

It is not possible to get bus companies to cover all of rural Dorset so by creating improved community schemes we are able to offer alternative travel solutions to those areas not covered by the main bus companies, which benefit people and the environment. Volunteer car schemes or dial-a-ride, can be more responsive to people’s needs for medical, social and leisure journeys. There is already a good network of community transport in Dorset and we want to help it grow.”

More information about community transport options can be found at:
dorsetcouncil.gov.uk/community-transport

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Section 1: Introduction to community transport



- Acting as the provider of a mix of transport services for passengers
- Acting as a co-ordinator of vehicles owned by others
- Acting as a 'one stop shop' for passengers
- Acting as a service to provide advice on needs, issues and development
- Acting as a catalyst to improve transport provision.



What is community transport?

Community transport is a service provided by the local community in response to specific local transport needs. The schemes run on a not-for-profit basis, or as a social enterprise, often involving volunteers to manage and deliver the service. Community transport is regarded as an effective, flexible, small scale solution for meeting the mobility needs of specific individuals and local groups.

Community transport solutions connect:

- Community and youth groups with social, recreation and entertainment centres.
- Socially isolated people to essential services and facilities.
- Local people with schools, libraries, shops, friends, clubs and community events.
- Older people or those with a disability to essential medical services.

Community transport can take some or all of the following roles:

Community transport can offer the following benefits for a local community:

- It can give individuals greater independence and improve their well-being and quality of life.
- It can be the ideal response to a local transport problem.
- The use of volunteers can reduce the overall cost of travel.
- It can provide employment to the local area.
- It can strengthen the rural community across a district.
- Links with local transport action groups and parish council transport representatives to help solve transport issues.

Community transport in Dorset

The present schemes in Dorset provide an invaluable service to thousands of local residents who have difficulty accessing public transport. These community transport schemes play an important role for helping people to access services in rural areas.



Types of community transport services in Dorset

Community transport schemes operate on many levels, from small to large, from all volunteer to several paid staff. The size and scale of operation aims to be appropriate to local needs. The following examples demonstrate how individual community transport schemes provide a different mix of services:

- NeighbourCar is a community car scheme run in Dorset. Each scheme is run by the community, for the community; everyone is a volunteer and each scheme is different. The umbrella name is 'NeighbourCar' but each community decides the name it wants to be.
- North Dorset Community Accessible Transport (NORDCAT) is a charitable organisation which provides a door-to-door accessible minibus service across Dorset. This enables access to shopping, visiting friends, medical appointments and much more. NORDCAT operates in different areas each day.

- Dorset Community Transport (DCT). DCT is a charitable organisation and the local operation of Ealing Community Transport that launched in 2011. They have a fleet of approximately 50 vehicles, over half of which are wheelchair accessible. Their offices are based in Blandford Forum but they operate across all of Dorset. DCT can provide group transport for voluntary and community organisations.
- Weymouth, Portland and Dorchester Dial-a-Bus provides wheelchair accessible transport for elderly and disabled people who find it difficult to use existing transport services. Dorset Council's specially adapted minibuses are used during the time window available between taking service users to local day centres in the mornings and later in the afternoon.
- Martinstown Shared-Taxi is provided by a taxi operator using an 8 seater minibus on Mondays and Fridays to Dorchester. Sharing a taxi can keep fares low for individual passengers.
- Carsharedorset.com links drivers and passengers together to share their journey and save money on fuel.
- Car clubs provide members with convenient access to vehicles without the expense of ownership (such as tax, MOT, fuel, servicing, depreciation and parking).

Bere Regis Communibus

Bere Regis Communibus transports local people from Bere Regis and surrounding villages, including Wool. This scheme provides day trips to various locations and the minibus is also available for local groups or individuals to hire.

To note

Go to section 4 for information on setting up a community transport scheme.

A full list of all Dorset's community transport schemes can be found online at dorsetcouncil.gov.uk/community-transport

Section 2: Evidence gathering and identifying the need

It is important to assess the transport requirement and develop an appropriate solution, so this section provides some guidance on how to identify the need.



Quantify the need

Before you can begin to think about delivering a community transport service, you will need to have evidence of the need. This means breaking down what might be a generally accepted need for transport into specifics, by finding out exactly what the local community wants. This is often done in the form of a survey or questionnaire. Check whether your parish has already carried out a survey for their parish plan. Your parish council or parish transport representative should be contacted at an early stage.

You will need to consider questions such as: Who wants to travel?

- Are they male, female, young, old, disabled. If so, what ratio?

How many?

- How many people want to travel? Is it mainly groups, or individuals? Or a combination of both?

Where do they want to go?

- To work? Training? Shopping? Visiting friends or relatives? Going out for the evening?

How far do they need to travel?

- Into the nearest town? To relatives on the other side of the county?

When?

- At what time of day? During rush hour? Late at night? Early in the morning to catch a train?

How often do they need to travel?

- To get to work every day?
- For a regular doctor's appointment?
- A weekly shopping trip?
- For pre-planned or short notice trips eg. monthly trip to the market or Christmas trips?
- To be able to go out on the spur of the moment?

Identify existing services

In addition, you will also want to look at existing services and whether they are meeting people's needs:

- What service(s) already exist?
- Are there potential partners for this new community transport scheme?
- What needs do existing services meet?
- What needs do they not meet?
- Could they be adapted or improved?
- Could the existing transport services be altered in some way?
- Could they be incorporated as an element in a new community transport scheme?
- If services were combined and coordinated, would they provide a more comprehensive service than as individual services?

To note

Go to Appendix 1 to get a simple individual transport needs questionnaire that can be used to help identify the scale and nature of local transport needs. The questions can be adapted so that they are suitable for your community.

Section 3: Business plan



A business plan informs you and other interested parties (such as funders) of how you intend to run the community transport scheme in a sustainable manner. The business plan can act as the benchmark for the scheme's performance and should be reviewed regularly in terms of both the scheme's social and business purpose.

A business plan is the road map to tell others how you expect to get to your destination, from the set up to the operation of the scheme.

Once you have established the need, and how you plan to meet it, it is helpful to collate all of the information into a planning document, referred to as a business plan. This document will be set out, in a clear and logical manner.

Ask yourself the following questions at the beginning of writing a business plan:

- Why a project is needed?
- How it will work?
- Why your organisation should do it?
- How it will be managed?
- What the beneficiaries will gain?
- How achievements will be measured?
- What it will cost and how it will be funded?

How to write a business plan

1. The first step is planning – do you know what you want to do?

As a first stage it is necessary to agree what you want the service to provide. The service is likely to be described in the following terms:

- To provide affordable, safe and accessible transport for people in your area or village, whose needs aren't currently met.

Planning helps to make things happen, because you set out a clear process of small steps that take you from the need (people need transport) to the solution (a community transport scheme). You can break down the above statement, which describes the broad purpose of the scheme (i.e. mission statement) down into a series of aims. These set out specific activities you will do to meet the need you have found. They may be things like:

- To provide door to door transport for people who find public transport difficult or impossible to use.
- To set up a community bus scheme to go to town on Mondays and Fridays.

This will then lead to describing specific tasks such as applying for grants or funding.



2. The second step is recognising the principles and values underpinning the scheme

The scheme should be guided by principles to ensure that the community transport service addresses the greatest social needs of the local community.

The values are what the scheme believes in, such as accessibility, value for money, safety, dignity and respect.

3. The third step is identifying the requirements of the scheme

This will involve consideration of the relevant regulations, policies and procedures, area of coverage, staffing, vehicles, licensing and assets, methods to monitor performance, communication affecting the set-up, management and operation of such a scheme.

4. The fourth step is the gathering of market information

This will include identifying the community transport need. A marketing plan should be developed to support your scheme, go to section 8 and 9 for additional information.

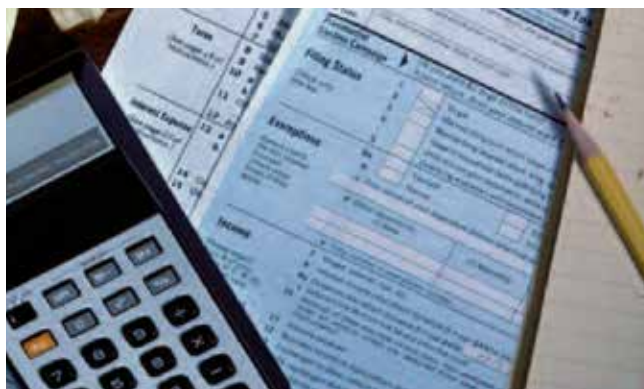
5. The fifth step is outlining the structure of the organisation

This will include describing the legal status and historical development of the scheme. It will also include an explanation of the legal structure and governance arrangements appropriate for the scheme.

It is important to describe the people involved and their skills to assist in the running of the scheme. You should describe the office premises/ depot, the required licenses and the health and safety requirements. A list of the names of the management committee and the management team with their roles and experience (include key staff members) should also be included.

6. The sixth step is providing the financial information

How much is it all going to cost and where will the finance come from?



A financial plan for the next (specify how many years e.g. three years) to support the delivery of the new scheme. The plan will outline the following capital, revenue and operating costs.

- The set up costs
- Running costs (forecasting)
- Cash flow forecast
- Income and expenditure
- Balance sheet
- Funding sources and fundraising activities (if applicable)
- A contingency plan if funds are running low
- Monitoring the effectiveness of the service to provide evidence for future funding need

Remember

It may be necessary to seek additional advice and guidance.

For further information go to Community Transport Association (see Appendix 4 for contact details).

Section 4: Setting up a community transport scheme

This section covers the process of getting a community transport scheme up and running after you have identified the transport need.

The following are steps on how to set up a community transport scheme:

Support of the community



- A community transport scheme cannot flourish in isolation; it must be part of the community it serves and be accepted by the community.

Hold a public meeting

- The public meeting will demonstrate how much interest there is in setting up a community transport scheme and the meeting can be used to appoint a working group.

Establish a working group

- This will be a group of like-minded individuals who have agreed to set-up the new community transport scheme. It is useful to make a list of the aims and objectives of the working group.

Decide on the name

When deciding on a name for your local community transport scheme it is important to consider the following:

- What's in a name? The name should reflect the service, for example, West Parley NeighbourCar.

- You should build up an awareness of the community transport scheme.
- It is important that your scheme does not use a name that is the same or very similar to that of another scheme.

Draft and agree the constitution

The constitution should include the following:

- The name of the community transport scheme.
- The area covered by the scheme.
- The objectives and purpose of the scheme.
- The responsibilities of the committee, the appointment of the officers and frequency of meetings.
- Who may become a member of the scheme and their voting rights.
- How funds are handled. Go to Appendix 3 for an example of a driver receipt slip. Dorset Travel at Dorset Council may be able to offer support and provide templates for producing these. Alternatively, for group trips, simple raffle tickets would be sufficient.
- What happens to the scheme's assets if it should be dissolved. Dorset Community Action would be able to give advice.

To note

For additional information, guidelines are available on when to use a constitution, the type of organisation a constitution creates, the organisations that use this structure and how the constitution is put into operation.

Go to: www.gov.uk/guidance/charity-types-how-to-choose-a-structure#12

Adopt the constitution

Once the constitution has been agreed, the next step is to formally adopt the constitution by holding a meeting whereby the first members sign the constitution.

Register as a charity

The Community Transport organisation needs to consider whether or not to become a charity. This can be done by completing the Charity Commission's charity registration form.

To note

For additional information on the registration process go to:
www.gov.uk/topic/running-charity/setting-up

All charities must follow the requirements of charity law, which includes the submission of an annual report to the Charity Commission.

Advisory group

It is useful to appoint an advisory group to provide guidance, local knowledge and to help promote the scheme. People involved are likely to be key influencers in the area, they may include:

- A representative from Dorset Community Action is an invaluable resource to help set up your scheme.
- The Dorset Interactive Neighbourcar Group (DING)
- Local voluntary representatives.
- Local councillors are influential to help with funding.

Policies and procedures

Before any services are provided to the community, at the early stage the committee will need agreement on a number of key policies and procedures, including:

Finance

It is important to have a good system of financial control in place to operate the finances of the scheme.

Insurance

Ensure that adequate insurance is in place, covering all aspects of the scheme such as vehicle, public liability and employer liability.

(For further advice on insurance contact CTA advice team, go to Appendix 4 for contact details.)

Recruiting volunteers

A local organiser can help decide whether it is more suitable for the community to set up a volunteer scheme or to book trips using a local transport operator's bus and driver. If it is decided to recruit volunteers, be clear about what you want your volunteers to do, the training on offer and the working conditions. It is important to interview the volunteers and carry out the correct checks. Volunteer Centre Dorset may be able to help find volunteers (go to Appendix 4 for details).

Employment and training

You will need to have a clear idea of the employment responsibilities which rest with the committee members and be aware of the procedures which should be put in place for recruitment, staff development, health and safety, training and so forth. CTA will be able to help (go to Appendix 4 for contact details).

Remember

- It is important to remember that you are not alone. Contact the relevant local authority officer who will signpost you to the correct contacts.
- Get in touch at the early stages of the set-up of the community transport scheme.
- Start getting your contacts list together right at the beginning.

Section 5: Operating a community transport scheme

Community transport delivers a wide range of community led transport services that cater for both individuals and groups. These services include Dial-a-Ride, community bus, voluntary car scheme and minibus group travel, which are designed to help meet the specific transport needs of sections of the local community. The aim of each scheme is to operate in a way best suited to the local area and the community it serves. These schemes are tailored to the needs of passengers, offering pick-up and drop-off points that are more convenient than fixed public transport stops.

The main types of community transport schemes are:

Dial-a-Ride



Dial-a-Ride is a door-to-door service designed to meet the needs of passengers who find it difficult or impossible to access public transport. Passengers book in advance by telephone and are provided with a reliable and personal transport service with specially trained drivers. Membership is open to those who meet the published criteria. The fares and trips are set out by the scheme and the service is delivered by minibuses and/or people-carriers by paid and/or volunteer drivers. The passengers' travel purpose must reflect the objectives of the scheme.

Legal basis and limitations of Dial-a-Ride

- Most Dial-a-Ride minibus schemes operate under the section 19 small bus permit.
- If a minibus driver is using a 16 seater minibus or more to deliver Dial-a-Ride the driver must have at least a restricted category D1 (101) on their licence. If a driver's license was awarded after 31 December 1996 then they can only drive on a voluntary basis in a minibus that doesn't exceed 3.5 tonnes, otherwise they must complete the full D1 driving test.
- Driver training is required under a Dial-a-Ride scheme. Dorset Council provides driver awareness training to enhance the driving and passenger awareness skills of individuals who drive minibuses in the course of their work or as volunteers. Dorset Council also provides training on first aid and safeguarding, go to Appendix 4 for contact details.
- Drivers must be trained to use the specialist equipment on the minibus.
- Daily checks, supervisor weekly checks, a 10 weekly safety inspection, scheduled servicing and annual MoT's should be planned to ensure the vehicle is roadworthy.

(Go to Section 6 for additional legal information.)

Voluntary car scheme



This is a form of organised lift-giving in a community. A local pool of drivers is available

to take people on pre-arranged journeys, usually co-ordinated by a central organisation. There are many car schemes running throughout the UK, each with its own personal emphasis. Some are run by the local branch of a national organisation, such as Age UK or by local parish or community councils. In some cases, where a specific need for transport by a group has been identified, a voluntary organisation or community may set up its own scheme, to help that group of people to travel.

Legal basis and limitations of the voluntary car scheme

- In order to carry fare-paying passengers in any vehicle it is necessary for that vehicle to comply either with public service vehicle legislation or be specifically exempted from those regulations.
- Social car schemes are the subject of a specific exemption from all the licensing and operating regulations. Provided that drivers do not make a profit on any expenses they are paid by (over and above the reasonable running costs of the car they use) the scheme, and more importantly its drivers, need only comply with the regulations applicable to private motorists.
- The general motoring requirements of the various road traffic acts must be met, the vehicles used in the scheme must be roadworthy, taxed and the drivers must be insured.

For information on voluntary car scheme set-up and training, contact DING and/or Dorset Travel Team, go to Appendix 4 for contact details.



Minibus group travel

This is based on the principle of sharing community owned minibuses which are operated under a standard section 19 bus permit. The minibuses are available for hire by a wide range of community groups ranging from youth clubs to senior citizen clubs. The minibus is supplied with a driver by the minibus owner or by the group hiring the minibus. A charge is made to the organisation for use of the vehicle.

Legal basis and limitations for a minibus group travel

- If a community minibus is operated for 'hire and reward' then a section 19 permit is required.
- Group hire uses the section 19 permit – which can be obtained from a Local Authority or certain designated bodies.
- A permit disc is displayed on the windscreen of the minibus at all times with the relevant vehicle papers.
- Drivers need to take a full D1 test if the licence is awarded after 31 December 1996 in order to drive a 9-16 seat minibus. For the latest guidance visit www.gov.uk and search 'Driving a Minibus'
- Driver training is recommended, for example, Dorset Council provides a driver awareness course.
- Drivers must be trained to use the specialist equipment on the minibus.
- Charges must be on a not-for-profit basis to only cover the operating costs and administration of the scheme.
- A list of registered drivers should be maintained.
- Only registered members of the community transport scheme are permitted to use this service, it cannot carry the general public.

Community buses



A community bus is a scheduled bus service for the local community operating on a non-profit basis. It is a regular, timetabled bus service with paid and volunteer drivers.

Legal basis and limitations for the community bus

- Operates under section 22 bus permit provided by the Traffic Commissioner or a Public Service Vehicle (PSV) operator's license.
- Register the route and timetable of the community bus with the Traffic Commissioner.
- Ensure the vehicle is built, adapted, maintained and certified to PSV standards.
- The vehicle may have more than 16 seats.
- Drivers must conform to the same licence requirement as Dial-a-Ride and minibus group travel.
- Drivers can be paid and volunteers can receive out of pocket expenses.
- Profit-making 'private hire' is allowed if the proceeds are used directly to support scheduled services.
- This bus service is open to the general public.

For further information contact the Community Transport Association Advice Team (go to Appendix 4 for contact details) who can guide you through the community transport set-up and operation stages.

To note

Go to Appendix 2 to find a checklist for comparing the operational features of each of the different services.

Section 6: Legislation

Community transport schemes provide safe, affordable and accessible transport solutions to their local communities. However, just like other services for the neighbourhood, community transport needs to operate within a legal framework. It is therefore important to understand the legal requirements governing the set up and operation of the scheme. There are many areas of legislation, particularly around transport and health and safety regulations that need to be considered by a community transport operator.

The principal legislative requirements of setting up and operating a community transport scheme are:

Operator licensing

An organisation providing 'not for profit' transport for 'hire and reward' in either a minibus (a vehicle capable of carrying 9-16 passengers in addition to the driver) or in a car/multi-purpose vehicle (maximum of 8 passengers plus the driver) that it owns/operates, will be required to hold an appropriate operator licence for each vehicle. For most community and voluntary organisations this will be section 19 standard permits.

Section 22 permits are also available, for those organisations that wish to provide 'not for profit' transport services to the general public on a registered bus route. For more information, search for 'section 19' or 'section 22 permits' at www.gov.uk.

Voluntary car schemes are exempt from both 'private hire/taxi licensing' as long as they operate within the requirements of what is termed 'car sharing' legislation, contained in Section 1 (4) Public Passenger Vehicles Act 1981.

'Hire and Reward' is defined as a payment that gives a passenger the right to be carried. This can be a direct payment; such as a fare or a contribution to the vehicle's operating costs e.g. petrol money or an indirect payment such as a club membership subscription, or paying for a service e.g. a luncheon club, which includes

free transport. Do not assume that the transport service you are providing is not for hire and reward, please check with the Community Transport Association (CTA) to confirm because if you get it wrong you could invalidate the vehicle insurance and the driver could face prosecution.

Driver licensing

For more information on driver licensing and minibuses, go to the DVLA website or download 'Driver Licensing for Minibuses' which is available from the CTA website, go to Appendix 4 for further information.

Driver training

While not a legal requirement for drivers with the correct licence entitlement, it is strongly recommended that an assessment of a driver's ability is made and appropriate training provided. Failure to provide such training could be deemed to be a breach of 'duty of care' and as such an offence under the Road Traffic Act 1991. Dorset Council provides driver awareness training which is recommended for community transport drivers. In addition, training on safeguarding and emergency first aid is available and further detail can be found at www.dorsetcouncil.gov.uk/dpttc (also go to Appendix 4 for contact details).

Minibus construction

Minibus(es) must comply with schedule 6 and 7 of the Road Vehicles (Construction and Use) Regulations 1986 or have EC Type Approval. For further details of these requirements contact CTA or visit their website.

Passenger safety



The Health and Safety of passengers, as well as employees and volunteers, requires that risk assessments are undertaken and recorded. For more information contact Health & Safety Executive and CTA. There is a code of practice that exists for the safety of passengers seated in wheelchairs. VSE 87/1 is available from the Department for Transport and the CTA. Seatbelt and child restraint rules differ between cars and minibuses. More information can be obtained from CTA and the DVLA.

Vehicle maintenance, licensing and insurance

- Vehicles operated under permits are required to be maintained and inspected to ensure that they are roadworthy. The VOSA 'Guide to Maintaining Roadworthiness' outlines what is required.
- MOT tests – the rules for minibuses are different to those for cars. More information is available from the DVLA and CTA. The vehicle registration and excise duty rules for minibuses are available from the DVLA and the CTA. Vehicle Insurance (under the Road Traffic Act 1988) is essential as part of any community transport scheme, as it is an offence not to be covered by third party insurance. It is essential that the correct cover for your scheme is obtained. For further information or advice contact the CTA Advice team. Go to Appendix 4 for contact details.

Other legal requirements you should be familiar with when using a minibus are:

- 'Duty of care' regulations – all operators are bound by this and should undertake thorough risk assessments.
- Speed limits for minibuses and the fitment of speed limiters.
- Domestic drivers' hours rules apply to paid drivers. See 'Rules on Drivers' Hours and Tachographs' available to download from www.gov.uk.
- Procedures should be in place for vehicle breakdowns and emergencies, including emergency evacuation in the event of a fire.
- Other factors to consider are the use of outside lane of motorways, the use of bus lanes, when towing trailers and when taking a minibus to Europe

Remember

Operating a community transport scheme is perhaps more complicated than you first think, but there are useful organisations that can help guide you through the process to your desired outcome. The CTA and Vehicle and Operator Services Agency (VOSA) can help with these and any other legal enquiries that you might have.

Section 7: Funding



Every community transport scheme needs adequate financial resources to meet its overheads and running costs such as insurance, fuel and maintenance. Local authorities do not have a legal duty to provide specific community transport services across their area.

A good business plan is helpful for fundraising, both as a supporting document and for providing text as a basis for filling in applications.

What grants are available?



Grants are available for community transport schemes in Dorset such as:

- Dorset Council's Community Transport Grant is available to support the establishment of new community transport services or to expand existing schemes to meet the need of local communities. Applications will need 50% matched funding of the total cost of the project. The Grant will fund costs associated with starting up and operating a scheme. These

include vehicle purchase costs, IT software that supports effective operation, marketing of schemes and training of staff or volunteers. You can request up to £5000 for capital expenditure i.e. vehicle purchase. £2000 is available for revenue costs such as IT systems, training and marketing, etc. You may only apply if your project is non-profit making.

- Dorset Community Foundation is a charitable organisation for raising and distributing funding and grant-making across the county. Go to www.dorsetcommunityfoundation.org for more details.

Organisations that help community based groups are:

- National Council for Voluntary Organisations (NCVO) provides information to community groups about a wide range of funding opportunities. Go to: www.ncvo.org.uk for further information.
- Funding Central lists funding and finance opportunities for voluntary organisations. Go to: www.fundingcentral.org.uk.
- Dorset Fundfinder is a tool on Dorset Council's website which enables Dorset's community organisations to search and browse funding, grants and information. This tool enables you to seek out grants, awards and other funding which may be relevant to your organisation by inputting some key information into the search engine. Go to: www.dorsetcouncil.gov.uk/your-community/support-for-voluntary-and-community-organisations/funding/dorset-fundfinder.aspx

In any funding application process it is important to include the following information:

What the proposed community service is?

What evidence do you have that this service is needed and why?

Why are you the best organisation to deliver the service?

How will you achieve your stated objectives?

How much will it cost to deliver the service?

How will you monitor the effectiveness of the service once you receive the funding?

Many grant providers do not offer recurrent funding, which results in the need for an ongoing focus on fundraising.

Do not develop a state of dependency on grants; it is not a sustainable method of finance for your community transport scheme.

Fundraising

If you know who and what you are fundraising for you should consider taking a strategic approach to your fundraising efforts. A planned approach is likely to produce better results. You may wish to consider fundraising from the three main sources of funding which are:

- **Grant-makers** (such as Trusts and Foundations)
- The **community** (through local fundraising activities)
- **Trading** (by providing transport services)
- **Crowd Funding** – offer shares in your community project or give rewards/services in return for funding

Community transport operators must structure their own fundraising activities throughout the year, and build them into an annual programme with targets. There is a wide range of options to use for generating additional finance from approaching a specific foundation to organising local events. There will be other innovative, creative and wacky as-yet unthought-of fundraising events.

Fundraising is not always money donations, it can be the assistance of volunteers, donation of vehicles or produce (free catering at a community transport event) and gifts in kind (premises, PR/brochures, give free professional advice).

You can run fundraising events such as fetes, sponsored walks and trivia quizzes, which encourages community involvement.

Get other fundraising ideas from:

- 'Idea Fundraising' offers great ideas to help you with fundraising, go to www.ideasfundraising.co.uk
- Fundraising sites on social networking sites such as Facebook

Section 8: Marketing



Marketing is an umbrella term for all the tools which are available to get your community transport scheme promoted and publicised. It is a communication method by which individuals and groups obtain information about who you are, what transport service you provide, when the service starts, where the service is operating (the area it services), why there is a need for community transport in your local area and how you are going to deliver the service.

To help clarify the features of the community transport service and for marketing purposes, the following are examples of the questions to ask:

Q Who you are?

A A community transport scheme based in (name of your village/town).

Q Who can use the service?

A Passengers who meet the scheme's membership criteria.

Q What do you do and what service you are providing?

A Affordable and accessible transport solutions, in response to local demand.

Transport for individuals living in rural areas of Dorset who are unable or find it difficult to use public transport.

Transport for a variety of purposes including shopping, to visit the health centre, to attend doctor's appointments and to go to the post office.

Provide community transport schemes such as dial-a-ride, voluntary car scheme and minibus hire.

Convenient, flexible transport which is operated by and for the local community.

Q When the service is available?

A The service is available seven days a week from 7am to 10pm except public holidays. Additional times are available, subject to demand and availability.

Q Where do you provide the service?

A We operate throughout rural Dorset but focus on the west of the county.

Q Why set up a community transport scheme?

A The local community identified the need and the scheme is the response to that call for improved transport provision.

Q How the service is provided?

A The service is provided by your local community transport scheme, using a wide range of resources including minibus(es) and volunteer car driver(s) to deliver the service within your neighbourhood.

Simple 7 Step marketing plan

Use the steps below to kick start your community transport marketing plan:

1. Step 1 – Understand your community transport market

A successful community transport market consists of people who have transport needs that are not being met. It is necessary to ask the following questions:

- Are the other community transport operators in Dorset competitors or partners?
- Is there too much competition?

2. Step 2 – Pick a niche

What is your unique selling point? e.g. you are the only locally-based transport scheme that specialises in individual door-to-door transport for young people and disabled persons in your local community.

3. Step 3 – Understand your customer

Who are your potential passengers? How do you reach the target audience?

A steering group, an individual transport needs survey or publicity to reach different groups of people within the local community.

How do my potential passengers normally travel? What services do the passengers need?

Passengers will use the scheme if it is what they need.

What encourages the local community to use the community transport scheme?

Where does the local community get their travel information (TV, newspaper, newsletter)?

4. Step 4 – Develop your marketing message

The marketing message tells potential users what you do and encourages them to use your transport scheme. For example:

Having transport difficulties? Live in rural Dorset; have no access to a bus/car?

If so [name of your scheme] may be able to help you with your transport problems and assist you with alternative travel arrangements.

Do you know anyone that lives in a rural area of Dorset and has difficulty in getting to the local shop? [Name of your scheme] can help.

[Name of your scheme] is easy to use, affordable, flexible transport in your local neighbourhood.

5. Step 5 – Decide on your marketing media

This is the form of medium that is used to inform potential users of your service. When marketing to the potential users of the scheme remember all printed, non-printed and media material must target the correct audience (go to section 9 for additional information).

6. Step 6 – Agree your marketing goals

A goal can be described as something to wish for e.g. to deliver the best Dial-a-Ride scheme in your local area and in the next 2 years to double membership of your community transport scheme.

7. Step 7 – Agree your marketing budget

How much do you plan to set aside to promote and publicise your scheme?

Remember

Marketing never stops. Don't think that just because you have put effort and resources into marketing at the beginning, you can sit back, relax and wait for the passengers to roll in.

Section 9: Publicity

Marketing and promotion are vitally important to the success of your community transport scheme. From the first public meeting which gauges interest in the idea of a community transport service in the local community, it is important to maintain publicity throughout the scheme's development to ensure that there will be ongoing commitment from the community. When the scheme is up and running, it will be necessary to continue publicising and promoting the service and providing general information to the local community.

Press advertising locally is encouraged - especially at the launch of the community transport scheme.

Print Promotion

Community transport logo

- Use the logo to pictorially describe the nature of the organisation's business.
- Reflect your community transport scheme in the logo e.g. community bus, wheels, location, people.

Leaflet

A guide to the layout of a community transport leaflet is:

- Front cover – name of the community transport scheme, picture that reflects your local scheme and a statement e.g. 'We have a set of wheels to suit you'.
- Next page – what you do as a local community transport scheme and who benefits.
- Max of 2 pages – what you offer, e.g. Dial-a-Ride, Voluntary Car Scheme, Minibus hire.
- Next page – membership form.
- Back page – your community transport logo, contact details and funders logo (if applicable).
- Tip – A4 size is advisable as it is the cheapest form to print and is the most versatile.

Poster

Having established the target audience for your publicity drive your poster should contain:

- The community transport name and logo.
- The key elements of the scheme – does it clearly say what it is about?
- Creativity – is it eye catching?
- A punch line e.g. "providing accessible and affordable transport to individuals and groups living in rural areas."

Press Release (PR)

- A press release is an announcement of an event or other newsworthy item that is issued to the media.
- It is a useful form of publicity to promote the launch of a community transport scheme and its services or a special community transport event.
- It provides free exposure, a new audience, new passengers and extra publicity for the scheme.
- Think of a press release as your ticket to publicity.

Press release layout

Press release layout	
Remember to use font size 14 and 1 ½ line spacing	
Press Release	Name of Organisation
	Date:
	Embargo:
	Short Heading
Paragraph one -	brief summary, say who, what, where, when, how and why
Further paragraphs -	give more detail. Include names, places, dates etc - avoid jargon. Include quotations and name the source (make sure you have their permission before you include). All quotations to be typed in bold.
Do not end a page in mid sentence.	
At end of each page type	More.....
At end of press release type	Ends.....
Boiler Plate should include; Photo details oör photo opportunity for paper photographer; Your name, address, telephone number (email if available) for further information. You can include more details about the company in the form of bullet points (so the paper can bulk out your piece if necessary).	
Then write	Ends.....

Photographs

- If you think the event presents a photo opportunity, invite the paper out, to improve chances of media coverage.
- The services of a professional photographer can be expensive so make sure the opportunity is a viable one.
- Dramatic or visually appealing photographs work best.
- Be creative.
- Look through photos used in press – what’s good and what’s bad.
- Always include a caption on the back.



Referrals

Word of mouth

Word of mouth comes from a trusted friend; therefore word of mouth is trusted.

Community transport provides a service to local people and word of mouth is a message from a reliable person in their community.

This will be the best form of promotion for the scheme, as it is free, improves reputation if feedback is positive and may increase community transport membership / passenger trips.

Money cannot buy good word of mouth, good community transport services do.



Remember

Different age groups expect different marketing approaches, adapt accordingly for each member of the local community.

E-marketing

- On-line marketing is relatively inexpensive compared to traditional marketing techniques but it does require customers to use modern technologies to receive the information.
- The use of search engines such as (Google, yahoo) can be an effective way of publicising your scheme.

- A growing number of community transport schemes are using social networking sites, such as Facebook or Twitter. Social networking is not only a free form of publicity, but has shown to be effective in reaching the younger generation, who may not respond to traditional forms of publicity.



Websites

- A community transport scheme can develop a website to launch and promote its services.
- A website can raise the profile of the scheme, reach the younger generation and open up new opportunities.
- The content must be customer focused to encourage people to use the transport services that are being promoted.
- Promote the website widely and keep it updated as necessary.

Email

- Emailing is a fast, flexible and effective way of getting your message to potential passengers who have access to the internet. Design the email to suit the local community needs. Provide an opt-out option for people who do not want to receive any more messages regarding your service.



SMS – text messaging

- A text message can be sent to a large group of potential passengers in the local community to promote the community transport services.

Remember

Research shows that on average a satisfied customer tells 3 people. A dissatisfied customer tells 11 people.

Decide who your target audience is and which media you should use to reach them e.g. Dorset Evening Echo, Wessex FM, Radio Solent, Forest FM, Heart FM, Air FM, local parish magazines, BBC South and Westcountry TV.

Section 10: Launch of the community transport scheme



Launching and running a community transport scheme is a challenging but rewarding process. In launching the new scheme, it is important to ensure that the community are aware of the new services offered. The launch should generate a 'buzz' in the community, to encourage attendance and the success of the business.

Event management

Consider the following steps to manage the launch of your community transport scheme:



- Several weeks before the launch, advertise the event in the local paper, local radio, local hospital radio and community newsletters.

- Publicity at the launch is very important, such as a local radio station, local newspaper, and local television broadcasting station.
- Generate hype prior to and during the launch.
- Use a press release to promote the service and its launch date, (go to section 9 to get an example of a PR).
- Use incentives such as free food or prize draw to encourage the local community to attend the event.
- Consider the best time to launch the scheme e.g. during a community festival.
- The funder (if applicable) may determine where and when the launch takes place.
- Invite key individuals to the event such as government officials, local councillors, support agencies or local celebrities from Dorset.
- Remember to invite all individuals involved in the original planning and set up of the scheme.
- Employ a local photographer, local newspapers or entrust someone on your behalf to take digital photographs.

Remember

Community first – invite the local community as they are the people who will be making use of the new scheme.

The step by step process to launch a community transport scheme:

- Plan, plan, plan
- Communication
- Marketing
- Exposure
- Membership, sale of the community transport services and celebration

Community transport launch ideas:

- Take a picture of first passenger(s) to use the scheme.
- Unveil the bus and invite local press.



Remember
When it comes to doing your community transport launch it is important to know your area, your passengers and be realistic about your ability to pull off the event.

- First passenger to use the service is awarded a prize e.g. free trips for a month.
- A local Dorset celebrity sitting in the bus or behind the wheel of the bus.
- Cut a ribbon to launch the community transport scheme- invite the local transport minister, local Councillors or a local celebrity to cut the ribbon to declare the project officially opened.
- For example a minibus convoy drawing attention to the launch of your new community transport scheme.
- Hold a local 'Mobility Awareness Day,' or 'Social Enterprise Day' or a local 'Volunteer Week'.

Appendix 1 - Questionnaire

Please note: These questions are a guideline and can be adapted so that they are suitable for your community.

Individual passenger transport needs survey

This transport questionnaire has been developed to find out which places you would like to get to. If you do not have any transport needs but you know someone who does, then please give them a copy of this form or fill in for them with their permission.

1. **Name of the village or town where you live?**

2. **What is your gender?**

Male

Female

3. **What age are you?**

<5

5-17

18-24

25-64

65-74

75+

4. **Do you have any long-standing illness, disability or infirmity which affects your ability to travel?**

Yes

No

5. **How often do you have access to the following types of vehicle (please tick for each type)?**

	Car as driver	Car as passenger	Other vehicle
Day time only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All the time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It varies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. **How often do you have access to public transport?**

Every hour in each direction Mon-Fri between 8am-6pm

Every two hours in each direction Mon-Fri between 9am-3pm

Once a day or more in each direction Mon-Fri

Less than once a day

No access to public transport services

7. Please state if there is anywhere you would like to get to but you cannot currently get there:

The place I can't get to is...
e.g. *Chemists*

The place is located in:
e.g. *Abc town centre*

The frequency, day and time I need to get there is...
e.g. *every Tuesday at 10am*

8. Please state why you are unable to access each of these services?

(Name a maximum of 4 reasons)

	Place 1	Place 2	Place 3	Place 4
There is no bus or train service available to get me there				
The bus stop is too far for me to walk				
I am unable to board buses or trains easily				
The departure or return times are not suitable				
Other reason <i>(please state)</i>				



9. Have you any further comments to add about your transport needs?

Thank you for participating in this survey.

Appendix 2 - Checklist for operating a community transport scheme

	Dial-a-Ride	Voluntary Car Scheme	Minibus Group Travel	Community Bus
Policies: the guidelines to ensure the correct operation of the scheme				
Define the limits of the scheme	✓	✓	✓	✓
How to pay drivers and charge passengers	✓	✓	✓	✓
Other policies	✓	✓	✓	✓
Money matters: the procedures to manage the finance and performance of the scheme				
Paid Driver(s)	✓		✓	✓
Volunteer expenses	✓	✓	✓	✓
Hire without driver			✓	
User fares/charges	✓	✓	✓	✓
Other costs- expenses incurred in arranging and completing the journeys	✓	✓	✓	
People Power: the roles of people involved in the operation of the scheme				
Management	✓	✓	✓	✓
Coordination	✓	✓	✓	✓
Scheduling	✓			
Finance	✓	✓	✓	✓
Driving (incl. training)	✓	✓	✓	✓
Administration: the specific admin needs required to run a scheme efficiently				
Administration	✓	✓	✓	✓
Booking	✓	✓	✓	✓
Scheduling	✓	✓	✓	✓
Recording/reporting	✓	✓	✓	✓
Minibus/car: operation and ownership				
Vehicle design and acquisition	✓		✓	✓
Minibus maintenance	✓		✓	✓
Hiring out			✓	✓

Appendix 3 - Driver receipt slip

<p>Drivers Record</p> <p>Area Date</p> <p>Driver Name</p> <hr/> <p>Driver origin (House No. and postcode)</p> <p>Passenger Name</p> <p>Reason for journey</p> <p>Passenger origin Passenger destination (House No. and postcode) (including postcode)</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Passenger trip length miles</p> <table border="1"> <tr> <td>A</td> <td>No. of passengers carried</td> <td></td> </tr> <tr> <td>B</td> <td>..... passenger miles @..... p per mile</td> <td>= £</td> </tr> <tr> <td>C</td> <td>..... miles between driver home and passenger home @..... p per mile</td> <td>= £</td> </tr> <tr> <td colspan="2">Total passenger contribution (B+C)</td> <td>= £</td> </tr> </table>		A	No. of passengers carried		B passenger miles @..... p per mile	= £	C miles between driver home and passenger home @..... p per mile	= £	Total passenger contribution (B+C)		= £	 <p>Received the sum of £..... as a contribution towards costs.</p> <p>Driver signature</p> <p>Date</p> 
A	No. of passengers carried													
B passenger miles @..... p per mile	= £												
C miles between driver home and passenger home @..... p per mile	= £												
Total passenger contribution (B+C)		= £												

Appendix 4 - Useful addresses

Dorset Council

Dorset Travel Team

Tel: 01305 224518
dt@dorsetcouncil.gov.uk

Driver Awareness Training

Tel: 01305 265726 or 07747 790444
kathleen.rice@dorsetcouncil.gov.uk

BCP Council

Tel: 01202 451451
www.bcpCouncil.gov.uk

Community transport operators

Axe Valley and West Dorset Ring and Ride

Tel: 01404 46520
axevalleyringride@btconnect.com

Dorset Community Transport

Tel: 01258 287980
dorset@ectcharity.co.uk

NORDCAT

Tel: 01258 473154
helen@nordcat.org.uk

SEDCAT (South East Dorset Community Accessible Transport)

Tel: 01202 598295
www.sedcat.org.uk

SSVCA (South Somerset Association for Voluntary and Community Action)

Tel: 01935 477399
www.ssvca.org.uk

Wessex Community Action

Tel: 01722 326822
transport@wessexcommunityaction.org.uk

Other organisations

Dorset Interactive Neighbourcar Group (DING)

dorsetcargroup@gmail.com

Community Transport Association (CTA)

Tel: 0345 130 6195
www.ctauk.org

Dorset Community Action (DCA)

Tel: 01305 250921
www.dorsetcommunityaction.org.uk

Vehicle and Operator Services Agency (VOSA)

Tel: 0300 123 9000
www.dft.gov.uk/vosa

Office of the Traffic Commissioner

West of England
Tel: 0300 123 9000

Driver and Vehicle Licensing Agency (DVLA)

Tel: 0300 790 6801
www.gov.uk/government/organisations/driver-and-vehicle-licensing-agency

National Council for Voluntary Organisations

Tel: 020 7713 6161
www.ncvo-vol.org.uk

Volunteer Centre Dorset

Tel: 01305 269214
www.volunteeringdorset.org.uk

Additional Funding Information

Grant Finder

www.grantfinder.co.uk

Appendix 5 – Information on Community Transport Association, Dorset Community Action and Volunteer Centre Dorset

Community Transport Association UK

The CTA is a national charity giving voice and providing leadership, learning and enterprise support to member organisations and individuals across the third sector that are delivering innovative and flexible transport solutions to achieve social change in their communities. The CTA promotes excellence through providing training, publications, advice, events and project support on voluntary, community and accessible transport. Voluntary and community transport exists to meet the travel and social needs of people to whom these would otherwise be denied, providing accessible and affordable transport to achieve social inclusion.
Welcome

CTA contacts

Advice and information service

Tel: 0345 130 6195
Email: advice@ctauk.org

Central office

Aeroworks, 5 Adair Street, Manchester M1 2NQ
Tel: 0161 351 1475
Email: info@ctauk.org
Website: www.ctauk.org

Consultancy service

Tel: 0161 351 1475

Dorset Community Action

Dorset Community Action supports charities, social enterprise and community groups to best achieve their goals, by helping make informed decisions, connecting to the right people and giving the skills and knowledge needed to make their project and organisation a success.

Dorset Community Action (DCA)

Tel: 01305 250921
www.dorsetcommunityaction.org.uk
email: info@dorsetcommunityaction.org.uk

Volunteer Centre Dorset

Volunteer Centre Dorset is part of a national network of volunteer centres that help voluntary and community organisations recruit and manage their volunteers, and helps people interested in volunteering to find interesting and enjoyable opportunities. Their core functions are to promote and develop volunteering, provide brokerage and provide training and information research.

Volunteer Centre Dorset

Tel: 01305 269214
www.volunteeringdorset.org.uk
email: info@volunteeringdorset.org.uk

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