SOCIAL AUDIT

PERTH & KINROSS COMMUNITY TRANSPORT GROUP (PKCTG)

PKCTG RURAL PROJECT
REVISED SOCIAL ACCOUNTS
January 2002 to January 2003
(13 months)

Perth & Kinross Community Transport Group
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1. PERTH & KINROSS COMMUNITY TRANSPORT GROUP – BACKGROUND

Perth and Kinross is an extensive area of over 5000km^2, with a population of almost 135 000, which is expected to continue to rise. The area is predominantly rural, with less than 30% of the population living in the major settlements. One quarter of the population is expected to be over 60 years of age by 2010. There are some communities where the proportion of older people is already around 60%.

In 1993, Perth & Kinross Association of Voluntary Services (PKAVS), Tayside Regional Council's Public Transport Unit and Rural Forum invited community transport operators and others in Perth & Kinross to hear about experience in the Scottish Borders. This was followed by an invitation from Tayside Regional Council to existing operators to contribute to a major study of Community Transport in the area that was undertaken by Halcrow Fox and published in 1995. A guide to community transport in Perth & Kinross was produced and disseminated as part of the study. With encouragement from the Council's Public Transport Unit and under the auspices of PKAVS, operators continued to meet to exchange experience and with the intention of periodically updating the guide.

In 1998 those regularly meeting agreed a name and constitution, whereby Perth & Kinross Community Transport Group (PKCTG) was independently constituted as a voluntary association with the aim of supporting and promoting community transport in Perth & Kinross.   Objectives include:

- To provide a forum for exchange of information on community transport and associated issues;
- To respond to the needs of local community transport users and providers by taking forward matters of common interest;
- To monitor and promote the implementation of studies relating to Community Transport in Perth & Kinross;
- To bring together individuals and representatives of statutory and voluntary organisations;
- To discuss transport needs, identify existing service sand highlight gaps in those services;
- To work with statutory and voluntary agencies to enhance the effectiveness of services wherever possible;
- To make information available to individuals and groups;
- To promote, safeguard and improve the rights of disabled people.

Membership of PKCTG is open to groups and individuals interested in statutory, public and community transport provision in Perth & Kinross.

Perth and Kinross Community Transport Group meets regularly, every two months to discuss developments, opportunities and difficulties arising for community transport operators.   While any community transport operator or interested party may attend the meetings, regular contributors have included:

Community minibus operators
Community car scheme operators
Public Transport Unit
Care Together
Commercial bus operator

PKCTG has developed a variety of initiatives including:

1995 onwards	PKCTG meetings provide a forum for operators to raise issues and respond to consultations
1998 onwards	Community Wheels newsletter (circulation 500+)
1998 onwards	Information and support for minibus driver training (MiDAS)
2001	Published: Guide to Perth & Kinross Community Transport
2001	Annual events providing informal education and discussion opportunities
2001-3	Rural Transport Initiative funded by Scottish Executive Rural Community Transport Initiative + Perth & Kinross Council + Tayside Health Board

Across Perth & Kinross there are a number of community transport operators, ranging from very informal, neighbourly lift-giving, to operators maintaining small fleets on minibuses and/or wheelchair accessible cars. PKCTG strives to remain aware of the full range of services available in the district and to engage with as many as possible.

Engagement ranges from circulation of Community Wheels, inclusion on database of current operators (see Appendix 1), invitations to PKCTG meetings, membership (see Appendix 1) and participation in the Officers Group (see Appendix 1). PKCTG meetings are open to anyone with an interest in community transport and are advertised through Community Wheels. Paid up members elect officers at the AGM for terms of three years. Membership is £10/year. Day to day management of the Group and Rural Project is delegated to an Officers Group comprising Chairman, Vice-Chairman, Secretary, Treasurer and others willing to contribute their time and experience.

Perth & Kinross Community Transport Group

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        │  Transport operators, users     │
        │  and other interested parties   │
        └─────────────────────────────────┘
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        ┌─────────────────────────────────┐
        │            PKCTG                │
        │           Members               │
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        │        PKCTG Officers           │
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             │                   │
   ┌──────────────────┐  ┌──────────────────────────┐
   │  Rural Initiative│  │   Community Wheels       │
   │                  │  │ and other general        │
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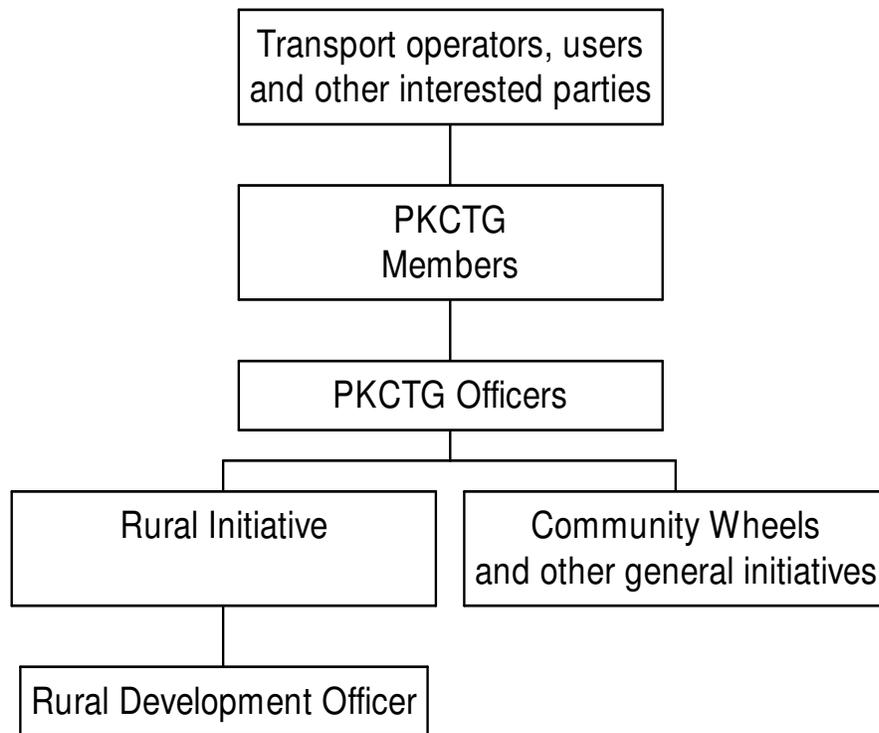
| 3. | **THE RURAL PROJECT – BACKGROUND** |

In 1995 a major study of Community Transport in Perth and Kinross by Halcrow Fox identified the need for support and co-ordination and more recent reports and observations have re-inforced this. The Tayside Health Board review of acute services and the introduction of Care Together - integrating a number of health and social care functions – were identified as likely to change the pattern of delivery of health and social care in Perth & Kinross with knock on effects particularly for community transport operators. Transport had also been identified as a major issue in recent Council, community planning consultations and health service reviews.

Community transport provides only a relatively small proportion of transport services in Perth and Kinross. However, it is a particularly important provider for the most vulnerable and those least able to use conventional transport, particularly in rural areas.

In October 2000 the Group convened a meeting with representatives of the health board, Council, CTA and local college to discuss how PKCTG could best support community transport organisations in the area. In December 2000 the Group made an application to the Scottish Executive Rural Community Transport Initiative for a grant to undertake development work in rural Perth & Kinross. The purpose of the project was to reach out beyond its Perth centred activities to support, develop and co-ordinate those resources that already exist in the rural areas. The application included a small amount of funding towards a social audit of the project.

| 4. | **SOCIAL AUDIT OF THE RURAL PROJECT** |

Introduction

The Group has been keen to monitor its impact in an area of work that is often difficult to measure. While direct service providers can measure services directly in terms of number of passengers/journeys, the role of the Group is one of support, and therefore indirect. There is no doubt that without the Group or the Rural Project, community transport would continue to be provided in Perth & Kinross. It is the Group's intention however, that the work of the Group through the rural project will improve the quantity, quality and efficiency of community transport in the area and contribute to alleviating the disadvantages of rural isolation. The Group agreed to undergo a social audit as a means of objectively reviewing the Project's achievements and to do so from the start of the project to maximise its learning. The Social Audit covers thirteen months of operation starting from the appointment of the rural development officer (RDO).

| 5. | **STAKEHOLDERS** |

At a Group meeting in December 2001, the Chairman made a presentation to the Group covering different forms of monitoring and evaluation including Social Audit. Members confirmed the intention to undertake a social audit and discussed the values, objectives and stakeholders for the rural project. Stakeholders were identified as:

Figure 1: Stakeholder Map

Key Stakeholders	Other Stakeholders

Individuals in rural areas without independent transport
 	
PKCTG Members
 	
Community Transport passengers and volunteers
 	
Community Transport organisers
 	
Rural CT Development Officer
 	
Funders:
        Scottish Executive
        Perth & Kinross Council
        Tayside Health Board
	Community groups including Perth & Kinross Access Group; support groups for people with health/ social issues & community councils.
	
	Other Transport providers/ Organisers including bus companies, taxi companies, other minibus operators, Health board/Social Work car scheme organisers
	
	Churches

6.	MISSION & OBJECTIVES

Mission:

To improve and extend accessible transport opportunities for people in rural Perth & Kinross by supporting community transport delivery and developing opportunities for community transport operators to work with public transport, social work, patient transport service and others.

Values:

- To work with local community transport operators to develop inclusive, safe and effective transport services suitable for all people for all purposes

Objectives:

1. To work with community transport operators in rural Perthshire and Kinross to maintain information to users and potential users

by……

- Recruiting Rural Community Transport Development Officer and find appropriate office accommodation in a community facility based in a market town in Perth & Kinross;
- Maintaining up to date reference information (hard copy & computer file) on services included in the Perth & Kinross Community Transport Guide and new services as they arise;
- To design and implement marketing strategy to promote the sector and its services to users, funders and others

2. To work with community transport operators in Perth & Kinross to develop and sustain more effective and efficient service provision for users

by……

- Building relationships between the Rural Community Transport Development Officer and community transport groups across rural Perth & Kinross;
- Building capacity of local community transport operators by responding to identified needs;
- Involve users, service providers and other stakeholders in initial benchmarking of community transport services in the area and provide two-yearly reports to the Community Transport Group;
- To explore potential for improving services to users through the use of new technology and improved communications, particularly the use of computerised booking services,

availability of mobile phones in case of mechanical breakdowns/other emergencies, publication and exchange of information via internet etc.

3. To work with community transport operators in Perth & Kinross to organise training for local DATs and to co-ordinate MiDAS training

by……

- Identifying training needs and ensuring access to training

4. To work with community transport operators in Perth & Kinross to identify opportunities for joint working in a number of localities

by

- Exploring opportunities for one or more agencies to work together on:
  Volunteer recruitment & training;
  Insurance arrangements;
  Maintenance and breakdown cover;
  Passenger brokerage;
  Vehicle brokerage;
  Joint marketing;
  Communications and/or other development initiatives.

- Exploring opportunities to pilot co-ordinated operation of the Perthshire Hopper and Access Cars in rural Perthshire

5. *To work with community transport operators in Perth & Kinross to maintain and develop working relationships with the major public and private transport providers to improve services for users.*

by …..

- Building relationships with the major public and private transport providers
- Supporting opportunities to build relationships between community transport operators and public and private transport providers.

7.	METHODOLOGY

The social audit process had a number of components:

1. PKCTG Briefing on monitoring, evaluation and social audit (December 2001)
2. PKCTG Generate stakeholder map (December 2001)
3. Chairman/RDO draft social accounting framework (January 2002)
4. Social accounting framework presented to PKCTG (February 2002)
5. Draft social accounts prepared by Chairman/RDO (February 2003)
6. Draft social accounts presented to audit panel (March 2003)

The Chairman who is the only member of the Group with experience of social audit led the process. The process began with a briefing on approaches to monitoring, evaluation and social audit at the December 2001 meeting. The stakeholder map (see Figure 1) was drawn up at that meeting and the social accounting framework agreed between the Chairman and RDO.

The social accounting framework (see Appendix 2) was subsequently drafted by the Chairman and RDO and circulated to PKCTG for comments. The framework called for three main resources:

- Internal records (e.g. activity reports, diary)
- Evaluation survey by PKCTG (Appendix 3)
- Independent stakeholder survey (Appendix 4)

Internal records:
The RDO submitted reports every two months to full Group meetings, built and maintained records of his activities. Two interim reports using the social accounting framework were submitted to funders.

PKCTG Evaluation Survey:
PKCTG issued an evaluation questionnaire at its Rural Transport Event at Birnam in June and subsequently circulated copies with the Community Wheels magazine (circulation ~ 500). Information for the social audit has been drawn from this evaluation and is referred to hereafter as the 'PKCTG evaluation'.

Independent Stakeholder Survey:
PKCTG commissioned a telephone survey from Peter Noad in January 2003 specifically to gather information from community transport operators in support of the PKCTG Social Book-keeping system. This is referred to below as the 'Independent Operators' Survey' to distinguish it from the PKCTG evaluation. The Independent Operators' Survey includes feedback from officers of the Group and community transport operators across Perth & Kinross. The information was obtained on a confidential basis by an independent third party to encourage people to be as open as possible with their responses.

Omissions

Community transport passengers and individuals with unmet need have not been covered in this process. They are recorded as key stakeholders because the Group wanted to maintain their focus on service delivery. As the Group only impacts on service users indirectly, it would not be appropriate to expect them to clearly identify the impact of PKCTG activities.

With respect to funders, it has not been possible to involve NHS Tayside or the Scottish Executive Transport Division in this accounting process, although Perth & Kinross Council are involved directly in the Group (PKCTG Vice Chairman is an officer of the Council).

Key Stakeholders Consultation

Following the meeting in December 2001, Group members were circulated with the results of the discussions about values, stakeholders, consultation plans and social book-keeping proposals. The consultation methods were revisited at the PKCTG meeting in January 2003 and the consultation process is summarised below:

Figure 2: Consultation Summary

CONSULTATION METHOD	DESCRIPTION	STAKEHOLDERS CONSULTED	NO. CONSULTED	NO. RESPONDED
PKCTG Evaluation Survey	Questionnaire	Participants at Rural Transport Event	26	12
	Questionnaire	All recipients of Community Wheels newsletter	500+	7
Independent Stakeholder Survey	Interview	PKCTG Rural Development Officer	1	1
	Telephone survey conducted by independent researcher, Peter Noad	CT organisers	8 minibus 12 car schemes	5 minibus 7 car schemes
	Telephone survey conducted by independent researcher, Peter Noad	PKCTG officers	4	4
	Telephone survey conducted by independent researcher, Peter Noad	PKC liaison	1	1

8. PROJECT FUNDING

The Group agreed the following funding over the two financial years 2001/2 and 2002/3. The capital spend was all in the first year and related to office set up.

Source of funding	Amount	
	Capital (£)	Revenue (£)
Tayside Health Board		10 000
Perth and Kinross Council		10 000
Scottish Executive RCTI	2 000	52 627
Totals	**2000**	**72 627**

Planned expenditure showed the following profile:

	Annual Budget	Annual Budget	12 months Actual	12 months Jan 2002-Dec 2002
	2001/2	**2002/3**	**Jan 2002-Dec 2002**	**%**
CAPITAL COSTS				
Office equipment	*100%*		2088	
Sub - total	**£2 000**	0	**2088**	*104%*
REVENUE COSTS				
Salaries	*47%*	*50%*	19810	*62%*
NI & pension costs	*7%*	*5%*		
Travel & subsistence	*4%*	*4%*	1253	*4%*
Recruitment costs	*4%*		26	*<1%*
Rent & rates, heating & lighting	*6%*	*8%*	2820	*9%*
Telephone & postage & copying etc	*8%*	*10%*	2007	*6%*
Subscriptions & membership fees		*1%*	50	*<1%*
Accountancy & professional fees	*1%*	*1%*	473	*1%*
Publicity & information	*4%*	*4%*	640	*2%*
Staff training	*1%*	*1%*	278	*<1%*
Communications/development initiatives	*14%*	*14%*	1309	*4%*
Social audit – set up, facilitation and audit costs	*2.5%*	*3%*		
Needs analysis (consultancy)			3500	*11%*
Sub - total	**£35 650**	**£36 977**	**£32166**	

Twelve months expenditure on the project was therefore approximately 90% of budgeted expenditure, with higher than anticipated expenditure on salary and less spending than anticipated on communications/ development initiatives and publicity and information.

9.	REPORT ON ACTIVITIES

Objective 1: To work with community transport operators in rural Perthshire and Kinross to maintain information to users and potential users by:

1a   Recruiting rural community transport development officer and find appropriate office accommodation in a community facility based in a market town in Perth & Kinross.

The appointment of a rural development officer (RDO) was regarded as a crucial factor in determining the success of the project.

The Group had anticipated a July 2001 start for the RDO. PKCTG received confirmation of funding in late April 2001, but with key members of the management group under considerable pressure with their own employment, it took two months to prepare support material and place advertisements for the post.

The post was advertised in July, locally (in The Courier), nationally (in the Big Issue), and in the relevant 'trade' publication (Community Transport Association magazine) and six applications received. Three candidates were interviewed in August and an offer of employment made in September. Further to the offer of employment, the candidate was able to negotiate improved terms and conditions with his existing employer and subsequently turned down the offer of employment with PKCTG.

The post was re-advertised in October 2001 in the Courier and Scotsman. Three candidates were interviewed in November. None of the candidates had voluntary sector or community development experience, although each had transport service experience. It was agreed, following a second interview in early December that one candidate showed potential and recent learning experience and he was offered the post of Rural Development Officer in November2001. It was agreed that the RDO would require considerable support from Officers of the Group and the Chairman has met with him at least fortnightly during the year. The RDO attended the Group meeting in December, and started work full-time in January 2002.

A personnel folder was developed by Officers of the Group, covering:

1.   *Person Specification*
2.   *Job Description*
3.   *Interview Schedule*
4.   *Application Form*
5.   *Sample letters to applicants*
6.   *Contract of Employment*
7.   *Disciplinary & Grievance Procedures*
8.   *Employer's Liability Insurance*
9.   *Payroll arrangements*
10.   *Expense claims*

11.   *Petty cash system*
12.   *Employee Guidance & Procedures*
13.   *Employee Records*

The Group's Treasurer further supported the RDO in identifying and installing an appropriate computer and software.

The establishment of an office base was a priority pursued by the RDO. Three options were identified. One was discarded, as too close to Perth City, another in Kinross was not favoured for its geographical location and the standard of accommodation. The third option, advertised in the Property Centre, was an office at the Blairgowrie Business Centre that was owned by an Officer of the Group.

In considering the office base at Blairgowrie, the relevant Officer was immediately removed from the list of cheque signatories for the rural project and was excluded from discussions about the office location. The decision-making process was open and the decision to extend a three month trial period was ratified at a meeting of the full Group held in the office so that members could inspect the accommodation.

The RDO identified and purchased furniture for the office.

Quantitative Data:
1 Rural Community Transport Development Officer appointed December 2001
Office accommodation leased at Blairgowrie Business Centre from January 2002
Source: PKCTG files

Qualitative Data:
The RDO had initial reservations regarding the geographical location which have been overcome and in discussions with PKCTG Officers he has reported that he has found it a relatively convenient base from which to access other rural parts of Perth & Kinross.
Source: PKCTG officers

Commentary:

Key Issues: **Delayed Start**
                         Level of Officer Involvement

The delay in getting the project underway has had significant consequences for the project in terms of aspiring to meet targets within a telescoped time frame. This has been compounded by the lack of community development experience of the RDO who has had much to learn in a very short time-scale.

The time commitment to this project by officers has not been recorded, but has been substantial and far exceeded initial expectations. This has been compounded over the year with changes to the Officers at the AGM, and another contributor to the Officers Group moving away from the area, adding particularly to the Chairman's workload over and above that of anticipated 'line management'.

The Group's plans to continue the project with a part-time RDO reflect in part the need to reduce the pressure on PKCTG office bearers.

The office is large – sufficient for Group meetings to be held there periodically. It is in the centre of the market town of Blairgowrie and offered the best value for money of the limited choices open to the Group. The intention was to prioritise time spent on action to further the project rather than on identifying further options. However, the first floor office is not accessible for those with mobility aids/difficulties and was therefore not regarded as ideal.

1b   Maintaining up to date reference information (hard copy and computer file) on services included in the Perth & Kinross Community Transport Guide and new services as they arise.

A database of 23 community minibus and community car schemes has been developed by the RDO (see Appendix 1). The database contains the following fields:
Organisation;
Operating Area;
Contact (name and telephone contact);
Qualifying Criteria (i.e. for whom the scheme provides transport);
Vehicles in operation (in the case of minibus schemes only).

Files have been opened for each identified community transport group and hard copy of the above, plus additional information and 'date updated' is stored in the filing system.

The RDO and Officers have updated contact information for the full range of organisations included in Community Wheels distribution (CT operators, community councils, councillors, health centres, schools, and other Council contacts).

Quantitative Data:
Database of community minibus and community car schemes on computer and paper
Source: PKCTG computer & files

Qualitative Data:
8/12 operators have been asked for information by Perth & Kinross Community Transport Group.
Source: Independent Stakeholder Survey (Noad Report)

Commentary:
Key Issues: ***RDO contact with local operators***
                 Administration
                 Sharing Information

The information gathered is patchy and the independent stakeholder survey (Noad Report) suggests that too many operators have not been contacted for information during the

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project. There has been criticism of the low level of contact between the RDO and local operators from PKCTG members – see also Objective 2.

Administration has been a constant challenge to the RDO as has 'help desk'-type i.t. support. It has become apparent during the year that effective recording, filing and strong i.t. skills are all essential to maximise the value of contact with local community transport operators.

There are links here between contact with community transport operators, administrative skills and the ability to present information in attractive and useful formats for interested parties. This suggests that the Group should look again at the essential and desirable skills required for the post.

1c   To design and implement marketing strategy to promote the sector and its services to users, funders and others.

An ad hoc marketing strategy developed to take advantage of a number of opportunities:

i.   *Volunteer Leaflet development and production (see also Objective 4);*
ii.   *Press releases;*
iii. *Attendance at promotional events and development of promotional material;*
iv.   *Use of Group's newsletter – Community Wheels;*
v)   *Promotional Events*

Early work suggested that there is a low level of awareness of the work of community transport operators and few had promotional material to encourage potential volunteers to come forward. The development of such material was identified as an opportunity to promote the sector to potential volunteers and increase awareness of the sector more generally. The leaflet involved pictures and interviews with volunteers from four community transport operators and the circulation and discussion of drafts at the PKCTG meeting in Crieff in November 2002.

Press releases were used to make people aware of forthcoming events and to feedback the results of events to a wide audience. Specifically, the following press releases were issued:

> *12 April 2002 – 'Highland Transport Challenges' (report of workshop held in Pitlochry on 20 March)*

> *12 June 2002 – 'PKCTG bring funding advice to Birnam' (to promote rural community transport solutions event on 24 June)*

> *28 June 2002 – Rural Transport Solutions – report of event held on 24 June Promotional events –*

The RDO attended two local events designed to promote local services,

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Better Place to Live Fair, Blairgowrie, June 2002
Meigle Older People's Forum, September 2002

The RDO has provided material for use in two issues of Community Wheels including reports of the Rural Solutions event at Birnam and the CTA conference in Manchester. The newsletter is edited by PKCTG committee members, the layout and printing done professionally and the 500+ circulation undertaken by the RDO and Perth & Kinross Council's internal distribution system to schools and Councillors. Three issues of Community Wheels were produced during the period of the social audit.

Quantitative Data:
A general lack of awareness of existing transport services from scheduled bus services to more specialised transport was reported at the Pitlochry Workshop in March 2002.
Source: Summary Report of Pitlochry Workshop, April 2002

The RDO's promotional activity comprised:
> *7   press releases – coverage in Perthshire Advertiser, Courier and The Comment*
> *2   promotional events attended*
> *2   articles for Community Wheels*
> *information gathering for the volunteer leaflet*
Source: PKCTG files & Community Wheels

10/12 CT operators recall receiving Community Wheels
Source: Independent Stakeholder Survey (Noad Report)

Qualitative Data:
The overall concept of the volunteer leaflet was received positively by PKCTG members.
Source: Minutes of PKCTG meeting, November 2002

3/12 community transport operators reported that they were aware of the marketing and volunteer recruitment initiative. One group reported that they would be using the PKCTG leaflets as soon as possible; while others either had separate recruitment mechanisms or were not currently recruiting.

None of the 12 community transport operators contacted identified marketing as an opportunity for joint working by PKCTG.
Source: Independent Stakeholder Survey (Noad Report)

Commentary:

Key Issues: ***Share a vision***

There is some disparity between the evidence of work undertaken, particularly with respect to involving community transport operators in the leaflet development, and the views of stakeholders. One explanation may be that PKCTG has failed to share a vision and strategy for what it has set out to achieve. Limited contact with community transport

operators reported earlier and under Objective 2, below, will have exacerbated this problem. PKCTG clearly needs to develop and share a vision and strategy for marketing the sector.

Objective 2:
To work with community transport operators in Perth & Kinross to develop and sustain more effective and efficient service provision for users

2a   Building relationships between the Rural Community Transport Development Officer and community transport groups across rural Perth & Kinross

The Rural Development Officer met with community transport groups across rural Perth & Kinross in a variety of formats:

i.   PKCTG Meetings (alternating between Perth City and a rural market town)
ii.   Officers meetings
iii.   Events
iv.   Development groups
v.   One to one meetings

Group meetings during the project period alternated between Perth City and a rural market town. It was anticipated that this would provide an opportunity for a wider range of operators to participate in PKCTG meetings and an opportunity to hear more about what the rural groups were doing. The rural meetings provided opportunities for the following presentations:

PKCTG meeting February 2002 – Blairgowrie – presentation from Blairgowrie Freedom Coach

PKCTG AGM & Event June 2002 – Birnam – on the theme of 'Rural Transport Solutions', presentations from Badenoch & Strathspey Transport Company, Buchan Dial a Bus and CTA.

PKCTG meeting November 2002 – Crieff – presentation from Strathcare

Quantitative Data:
The RDO attended the Group meeting in December 2001 (prior to taking up the position). The RDO attended 4/5 Group meetings throughout the year and presented progress reports at each meeting.

Participation by rural groups in PKCTG meetings has increased, particularly in the latter half of the year. Four rural groups and a representative of NHS Tayside have attended for the first time.
Source: Meeting Attendance Record (Appendix 5)

Each press release resulted in coverage in both the Perthshire Advertiser and The Courier, and the Comment (Highland Perthshire).

Source: PKCTG files

Qualitative Data:
Completed PKCTG evaluation sheets suggested members were evenly split between wanting a single, regular location for meetings and rotating meetings among different locations. Perth was identified as the most convenient location for meetings.
Source: PKCTG evaluation (Appendix 3)

Commentary
Key Issues: Building on the new rural contacts

It is encouraging that participation by rural groups has increased during the rural project and that the Group has been able to attract a number of new participants to its meetings. The challenge is now, not only to continue to attract new participants, but also to encourage those that have participated to return and contribute on a regular basis. However, participation by Perth based groups has reduced when the meetings have been held outwith Perth (with the exception of the AGM Event in Birnam). The impact of this should be monitored over time as diminishing participation may be cause for concern for the Group as a whole.

2a   Building capacity of local community transport operators by responding to identified needs

The rural project has aimed to build capacity through organising events that provide opportunities to share experience among operators and by providing information on relevant issues/on request.

The 'Rural Transport Solutions' event in Birnam in June 2002 was organised following discussion at a PKCTG meeting and follow up with Officers of the Group and others. The event brought speakers from Badenoch & Strathspey and Buchan to relate the history and development of their community transport schemes and to discuss some of the issues raised in workshops.

PKCTG meetings were the vehicle for a presentation on Disclosures Scotland by the Group's Vice Chairman, that was consequently written up in Community Wheels for wider distribution.

The RDO attended CTA training on the Bus Service Operators' Grant (BSOG) and was subsequently invited to pass on information and to discuss the prospects of claiming the grant with three local groups.

Quantitative Data
50% of operators (6/12) had improved the way they work over the previous two years. Of the six that had improved the way they work, five groups had received information or training from PKCTG that had led to an improvement.
Source: Independent Operators Survey (Noad Report)

Qualitative Data
The project has had greatest impact on minibus groups, with a majority of minibus operators reporting that they had received help leading to operational improvements, whereas the majority of community car scheme operators reported that they had not. Source: Independent Operators Survey (Noad Report)

Commentary:
Key Issues: Evidence of building capacity
*   Financing training*

The feedback from the stakeholders' survey is very encouraging, although it is not specific.

At least one local group identified MiDAS as a 'most useful feature' of PKCTG and minibus organisers identified training as a key issue they would like PKCTG to focus on in the future. There is clearly still scope for much greater effort to identify and meet the needs of community car schemes operators in the area.

2b   Involve users, service providers and other stakeholders in initial benchmarking of community transport services in the area and provide two-yearly reports to the Community Transport Group

Information was gathered from early meetings with key public sector providers that use volunteers, and from the CTA volunteers pack to establish key activities that might be part of benchmarking. Benchmarking has been interpreted as identifying the range and level of 'good practice' in operation. Recent work has resulted in record sheets being devised that are intended for confidential use by the RDO. The purpose of the record sheets is to provide an indication of the quality standards in place within individual organisations in order to pick up a clear picture of the situation across the area and between different schemes. This work will require sensitive information gathering and will extend beyond the current period.

Quantitative Data:
None available

Qualitative Data:
None available

Commentary
Key Issues: Sharing a vision
*   Close work with community transport operators*
*   Future work plans*

This is a sensitive issue that needs to be seen as a positive exercise in building capacity to be successful. It requires close work with community transport operators and building up trust.

> 2c   To explore potential for improving services to users through the use of new technology and improved communications, particularly the use of computerised booking services, availability of mobile phones in case of mechanical breakdowns/other emergencies, publication and exchange of information via internet etc.

A clearly defined Communications Initiative was introduced by the RDO in March 2002 and a promotional flyer distributed to local groups. Groups were invited to apply for funds to purchase equipment and/or software that would support community transport activities.

Quantitative Data:

Six applications were made for a range of equipment:
> *Mobile phones were the most popular (10 phones purchased for 3 groups)*
> *Telephone answering machine/fax (2 purchased for 2 groups)*
> *Scanner (1 purchased for 1 group).*

Source: PKCTG files

50% of local operators surveyed reported awareness of the Communications Initiative.
Source: Independent Stakeholders' Survey (Noad Report)

Qualitative Data:
The three local operators identified through the survey as receiving equipment under this initiative all reported that the equipment had benefited their organisation.
Source: Independent Stakeholders' Survey (Noad Report)

Commentary
Key Issues: ***Tangible benefits***
                Communications

This initiative has enabled PKCTG to deliver tangible benefits to a number of groups in the area in the shape of equipment that, because of its indirect contribution to the efficacy of transport operations, can be difficult to fundraise for locally. The level of awareness of the initiative is disappointing and highlights the need for greater communications between the RDO and local operators.

Objective 3:
To work with community transport operators in Perth & Kinross to organise training for local DATs (MiDAS trainers) and to co-ordinate Minibus Driver Awareness (MiDAS) training

3a   Identifying training needs and ensuring access to training

There was no budget to deliver training to local groups which has resulted in a careful approach towards training issues. Two main issues were apparent. Firstly groups' awareness of their own training needs. Secondly the demand for MiDAS/ DAT training.

Groups that the RDO has worked with are only now beginning to articulate their training needs (see notes of Aberfeldy meeting 3). It is important that the project delivers good information and training in the future to support this work.

The RDO worked with PKCTG members towards updating information on MiDAS for local operators and volunteers. However, work on this initiative appears to have stalled.

Quantitative Data:
Redrafted leaflet on MiDAS & PKCTG support
Source: PKCTG files

Qualitative Data:
Minibus organisers identified training as a key issue for future work and committee members and RDO identified MiDAS as a 'core issue' for groups, particularly given the cost.
Source: Independent Stakeholder Survey (Noad Report)

Commentary
Key Issues: *Budget requirements*
                         Need for ongoing communications with trainers

Shortly before the project began the Group had paid for DAT update training for local voluntary organisations. This lessened the immediate demand for DAT training/updating but there was some demand for MiDAS training costs to be re-imbursed. PKCTG funds (outwith the rural project) met the very limited number of requests for financial support. More might have been achieved under this objective had there been a training budget for community transport groups.

Limited communications with local operators resulted in little advance warning to the Group of MiDAS training opportunities and therefore little scope to offer financial support more widely.

Objective 4:
To work with community transport operators in Perth & Kinross to identify opportunities for joint working in a number of localities.

Exploring opportunities for one or more agencies to work together on:
- Volunteer recruitment & training;
- Insurance arrangements;
- Maintenance and breakdown cover;
- Passenger brokerage;
- Vehicle brokerage;
- Joint marketing;

Volunteer recruitment and marketing were areas identified for action by the RDO. Information about volunteer recruitment and support was gathered from Volunteering in Action and the CTA. Early work suggested that many groups found the recruitment of volunteers to be challenging and few had promotional material to encourage potential volunteers to come forward. The development of such material was identified as an opportunity to adopt a community development approach involving a range of rural Groups. This was necessarily an extended process, taking over three months from concept to completion. Considerable material was acquired during the development of this leaflet and this will provide several posters for use as promotional material.

Volunteers from four groups were interviewed and photographed and included in the leaflet. All known community transport operators in the area were sent a draft of the leaflet and invited to complete a short comment form and to request leaflets for local distribution. Six forms were completed and returned. The leaflet and feedback were discussed at the PKCTG meeting in September and a final version was approved by the Chairman and RDO in November 2002. Leaflet distribution is taking place in March 2003.

Specific ideas for informing public agencies about the local voluntary car schemes (so that public agencies can gain greater access to local volunteers) and for the introduction of a single telephone number for community transport have been discussed with community car schemes operating in Highland Perthshire. (See notes of meetings in Pitlochry and Aberfeldy). These discussions are ongoing and it may be that operators responded on the basis that none of these ideas have yet been realised, particularly given that maintaining and developing working relationships with public and private transport providers is considered to be a separate objective. (See Objective 5 below)

The RDO attended a number of seminars, potential relevant to joint/partnership working, including:
> *Partnership working with the health sector, Perth, May*
> *SCVO's web portal, March*
> *BSOG, CTA, Edinburgh, September.*

Quantitative Data:
Volunteers from 4 groups were interviewed and photographed and included in the leaflet.
All known community transport operators were sent a draft of the leaflet and invited to
complete a short comment form and to request leaflets for local distribution. Six forms
were completed and returned.   *Source: PKCTG files*

Qualitative Data:
Local groups overwhelmingly reported that PKCTG had not identified opportunities for
joint working, with no positive responses at all under the headings of maintenance and
breakdown cover or joint marketing. The opportunities identifed by a few minibus
operators included:
        (1) administration and financial management;
        (1) volunteer recruitement and training;
        (3) communications.

Source: Independent Stakeholder Survey (Noad Report)

The BSOG seminar was followed up with meetings to explore eligibility and other issues
with 3 local groups. There have been no equivalent outcomes from attendance at the other
seminars.
Source: PKCTG files

Key Issues: *Language*
                            Performance

Comments:
The result of the survey of community transport operator's is particularly puzzling with
respect to the very low level of awareness of joint working opportunities with respect to
volunteer recruitment and joint marketing, given the major and recent work on the leaflet.
Not even those car groups that contributed to the leaflet appear to have recognised this as
an aspect of joint working. It may be that, as suggested by the operator's survey, the car
groups are more focused on meeting the needs of their local communities, than on
strategic joint working. However, this may also be influenced by the fact that at the time
of the interviews the printed leaflet had not yet been circulated. PKCTG clearly needs to
work harder to share its vision of joint working.

'Joint working' is an ambiguous phrase and is difficult to measure and should be better
defined. Logically it would seem that there are close links between Objectives 4 & 5 and
these would be more appropriately seen as one objective.

In the light of this fairly inclusive process, it is difficult to interpret the findings of the
operators survey in which only one minibus operator identified opportunities for joint
working in either volunteer recruitment and training or joint marketing. It would seem
that the term 'joint working' has very different and specific meanings to different people

and that whilst there may be issues around the language used, there are clear difficulties in reaching a shared understanding.

Not one community car scheme reported that PKCTG had identified opportunities for joint working. This is particularly disappointing, given the level of work in Highland Perthshire where car scheme operators have been key contributors to meetings with public sector agencies in health and social care.

4a   Exploring opportunities to pilot co-ordinated operation of the Perthshire Hopper and Access Cars in rural Perthshire

Activity:
No activity was undertaken under this heading.

Key Issues: Policy/management changes

Comment:
By the time the RDO was appointed both the above organisations had experienced changes in management and the Chairman and RDO agreed not to pursue this as a priority as no further expressions of interest had been received from either group. Links have been maintained with both groups who are regular contributors to PKCTG meetings.

Objective 5:   To work with community transport operators in Perth & Kinross to maintain and develop working relationships with the major public and private transport providers to improve services for users
• Building relationships with the major public and private transport providers   • Supporting opportunities to build relationships between community transport operators and public and private transport providers

Activities:

PKCTG aims to include the major public and private transport providers in all its activities. Representation of public transport on the Group has been consistent, although private operators have not been represented at Group meetings this year.

In addition, PKCTG has set up particular meetings to attract participation by public and private operators as summarised in the table below:

Meeting	Purpose	Community Transport Organisations	Private Operators	Public Sector
Pitlochry March 02 29 participants	*Engage with local groups & investigate opportunities to improve/extend local services*	*1 minibus 3 local car schemes*	*Elizabeth Yule City Link*	*Scottish Ambulance Service* *P&K C Public Transport Unit* *P&KC Social Work/Care Together*
Birnam June 02 26 participants	*Share information/ Experience of rural transport solutions*	*4 minibus 3 car schemes*		*P&K C Public Transport Unit* *P&KC Social Work/Care Together* *P&KC Community Learning* *Tayside Primary Healthcare* *Perthshire Tourist Board*
Aberfeldy Oct 02 14 participants	*Familiarisation*	*1 minibus 2 car schemes 2 welfare/car groups*		*Care Together Social Work* *Aberfeldy Cottage Hospital*
Aberfeldy Nov 02 12 participants	*Update*	*1 minibus 2 welfare/car group shopmobility*		*Care Together Social Work* *NHS Tayside Scottish Ambulance Service* *P&KC Public Transport Unit*

Source: Meeting notes

Individuals and communities were also recognised as vital partners in identifying unmet demand for local transport. As a consequence PKCTG chose to work with Highland Perthshire Community Partnership to organise the Pitlochry event. At the Pitlochry event it was established that every participant was introduced to at least one transport organisation of which they were previously unaware. The Partnership were also commissioned to undertake a survey to identify transport problems and areas of unmet demand within the area. The report only partially met the brief for the work, but requests by PKCTG for Highland Perthshire Partnership to complete the work arrived at a point when they lost their only part-time member of staff. Negotiations regarding the completion of this work have led to an agreement that the Partnership will commission Peter Noad to undertake the outstanding work (commissioning letter received February 2003).

Quantitative Data:
The project has engaged with three significant departments of the local authority: the Public Transport Unit, Social Work/Care Together and Community Learning. In addition, the project has engaged with three significant parts of the health service: Scottish Ambulance Service; Tayside Primary Care Trust; Care Together.
Source: meeting notes

Qualitative Data:
The majority of minibus (2/3) and community car scheme (5/6) operators felt that PKCTG had helped to maintain and develop working relationships with the major public and private transport providers. The operators survey suggests that this objective has been realised in the view of community transport operators.
Source: Independent Stakeholder Survey (Noad Report)

Key Issues: Good levels of engagement on focused work

Comments:
This area of work seems to have benefits all round as people become more aware of the different services and demands. It has also provided the stimulus to raise difficult issues between community transport groups such as different mileage rates paid to volunteers (leading to apparent competition for volunteers) and the different levels of support to groups from the public purse. However, unless this develops into joint working and delivers measurable benefits such as reduction in dead mileage, reduced cost to passengers and/or public sector this level of input is unlikely to be sustained by the public sector or by voluntary groups.

10.   ENVIRONMENTAL STATEMENT

PKCTG has to date not focused on the environmental impact of its activities, however the project objectives reflect a desire to maximise the value of journeys made by all community operators by reducing 'dead' mileage and maximising transport opportunities. The issue might be considered in future projects/social audits.

11.	**MAIN ISSUES, CONCLUSIONS AND RECOMMENDATIONS**

This is a relatively small project, but was a big step for the organisation. PKCTG officers have made substantial contributions to establishing the Rural Development Officer post and in continuing to support the post-holder throughout the year. Both the officers and the RDO have faced steep learning curves in terms of finding the most appropriate roles for each. It is to the credit of the organisation that the officers have not sat back and handed over the financial management, group administration or the production of Community Wheels to the RDO. However, it is evident that officers of the Group need to find more time and energy for strategic management and policy direction and this could be found by drawing more people into the officers group and by some redistribution of responsibilities. Drawing more people into the officers group and PKCTG would also help the Group to build a shared vision for the future.

The RDO has identified and established an office base, learned a great deal about community development and community transport and begun to tackle some complex issues. Some significant areas of work are coming to fruition. Nonetheless, progress has been slower than had been hoped for and this social audit process has allowed the officers to draw some lessons for the future that will provide the basis for wider discussion.

The main issues raised in the analysis above are:

Positive aspects:
Evidence of recruitment & office start up
Evidence of building capacity
Good levels of engagement on focused work
Substantial Officer involvement

Negative aspects:
Delayed Start
Low levels of RDO contact with local operators
Administration

Future work plans must consider:
Sharing a vision with the future post-holder & local operators
Close work with community transport operators
Sharing information more widely
Raising awareness of responsibilities among operators
Raising awareness of strengths & weaknesses in local operators
Financing training
Communications
Need for ongoing communications with trainers
Language & Performance – PKCTG must use language which is widely shared with local operators to ensure that it sets targets and objectives that are both widely understood and achievable

It is important to recognise the impact on the rural project of changes in community transport groups and other external influences
Need to be wary of raising expectations that cannot be met

12.	**REFLECTIONS ON THE SOCIAL AUDIT PROCESS**

This has been an excellent process for establishing a framework against which to report on progress. However, project administration has proved a great burden to both the RDO and the officers of the Group throughout the year and the process has certainly contributed to that. The process of gathering together evidence at the year end has allowed us to devise a number of monitoring frameworks that should work effectively in the coming year – particularly the monitoring of PKCTG meeting attendance and the RDO contact sheet. At the start of the project we did not feel in a position to identify the frameworks that would best give us information and we were concerned that requiring additional reports would simply add to the administrative burden of the RDO, without adding to our knowledge. The RDO was therefore simply instructed to use his diary to record as much as possible of his activities and information was extracted from the diary to complete the contact information sheet.

13.	**FUTURE PLANS**

PKCTG has received an offer of continued funding of £73 000 over the next three years from the Scottish Executive Rural Community Transport Initiative. The basis of the application was continuation of a rural community transport development post (reduced hours), new training services and information technology initiatives for local groups. We are hopeful that through the experience gained by the Officer Group over the past year, we will not face the same difficulties in funding and recruitment as we move into the next financial year and new funding that we faced at the start of the project.

Social Audit Dissemination Plans

PKCTG intend to disseminate a summary of the social audit results in the form of an insert to Community Wheels Copies will also go to all funders and the CTA (who have expressed an interest in being recognised as stakeholders in future social audits). A copy of the full social accounts will be lodged with Perth & Kinross library service. The group will have an opportunity to discuss the results of the audit at a future PKCTG meeting.

The Next Social Audit Cycle

The funding package for the next three years includes a commitment to undertake a further social audit of the project after two years.

PKCTG
Revised July 2003

GLOSSARY

DAT   Driver Assessor Trainers (as part of the MiDAS Scheme DATs undertake the training and assessment of minibus drivers)

MiDAS   Minibus Driver Assessor Training

PKCTG   Perth & Kinross Community Transport Group

P&KC   Perth & Kinross Council