



**The Way Forward:  
Disability Service Organisations Transport System Study**

For

ACROD Victoria and VICRAID

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March 2004

The Way Forward: Disability Service Organisations Transport System Study for ACROD  
Victoria and VICRAID

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## Executive Summary

This document is a proposal for the development and implementation of **NorthWestAccess** – coordinated and integrated transport model for use by people with disabilities, based on a study covering nine funded service providers in the north-western suburbs of Melbourne between July 2003 and December 2003.

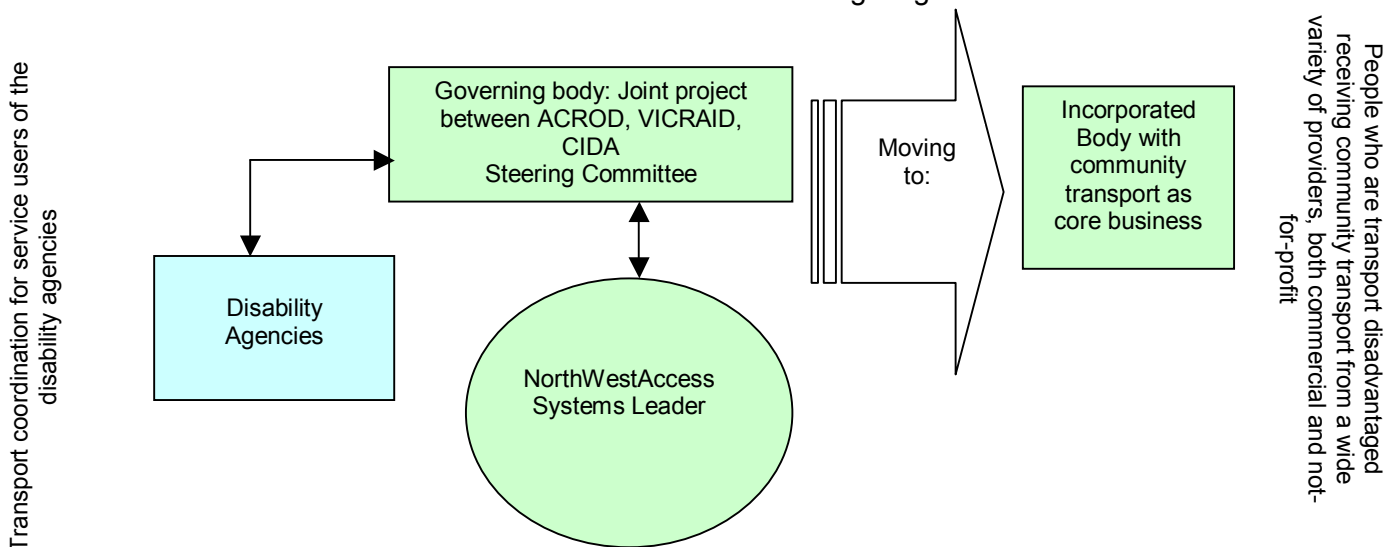
The consultants' findings indicate that the proposed model should:

- Be based on collaboration between agencies
- Have an initial phase focused on agency cost pressures associated with transport
- Include the contracting-out of specialist functions to organisations with relevant expertise.

The potential outcomes of this transport model within two years are:

- Cost efficiencies in place for participating agencies
- Transport policy and standards framework developed
- Coordination of driver training between funded agencies
- Trial coordination of transport routes, schedules and vehicles via a contracted provider
- Use of the online Vehicle Seeker as the central data management tool for NorthWestAccess
- After-hours access to transport available for clients
- Cooperative regional arrangements with other community transport systems.

The **structure** of NorthWestAccess is shown in the following diagram.



The initial target group for the community transport strategy is people with disabilities living, or accessing services, within the north-western suburbs of Melbourne.

Over time, the focus matures from developing and improving the transport provided directly by participating disability service agencies to one that is integrated with the broader community transport system(s).

The systems required to operate the NorthWestAccess model will be developed and managed at a central point by a Systems Leader. The model assumes that the position of Systems Leader will be part time and ongoing, although with a reduced time fraction over time.

The Systems Leader will be directly engaged by the governing body. It is proposed that NorthWestAccess be initially governed via a steering committee of the peak bodies: ACROD, VICRAID and CIDA, and include representatives from participating agencies, people with specific expertise in community transport, DHS, service users, taxi operators and others with particular interests, for example, bus service operators.

Initially, participating agencies will be DHS-funded disability service organisations in the newly merged North-Western Region. Participation will be voluntary. NorthWestAccess is designed in a way that allows an agency to choose at what level and in which transport system components it will participate, based on the benefits to the particular organisation and its client group. The degree to which a disability service will participate will be determined through a situational analysis undertaken jointly by the Systems Leader and the agency and formalised through a Memorandum of Understanding with the peak bodies.

It is assumed, in the early phases, that transport will continue to be provided through a combination of disability services and taxis. It is also assumed that some disability agencies will choose to hand over transport to others.

By the end of Year 2, NorthWestAccess would become a separate incorporated organisation, or merge with an existing organisation that has transport as its core business.

### **How NorthWestAccess operates**

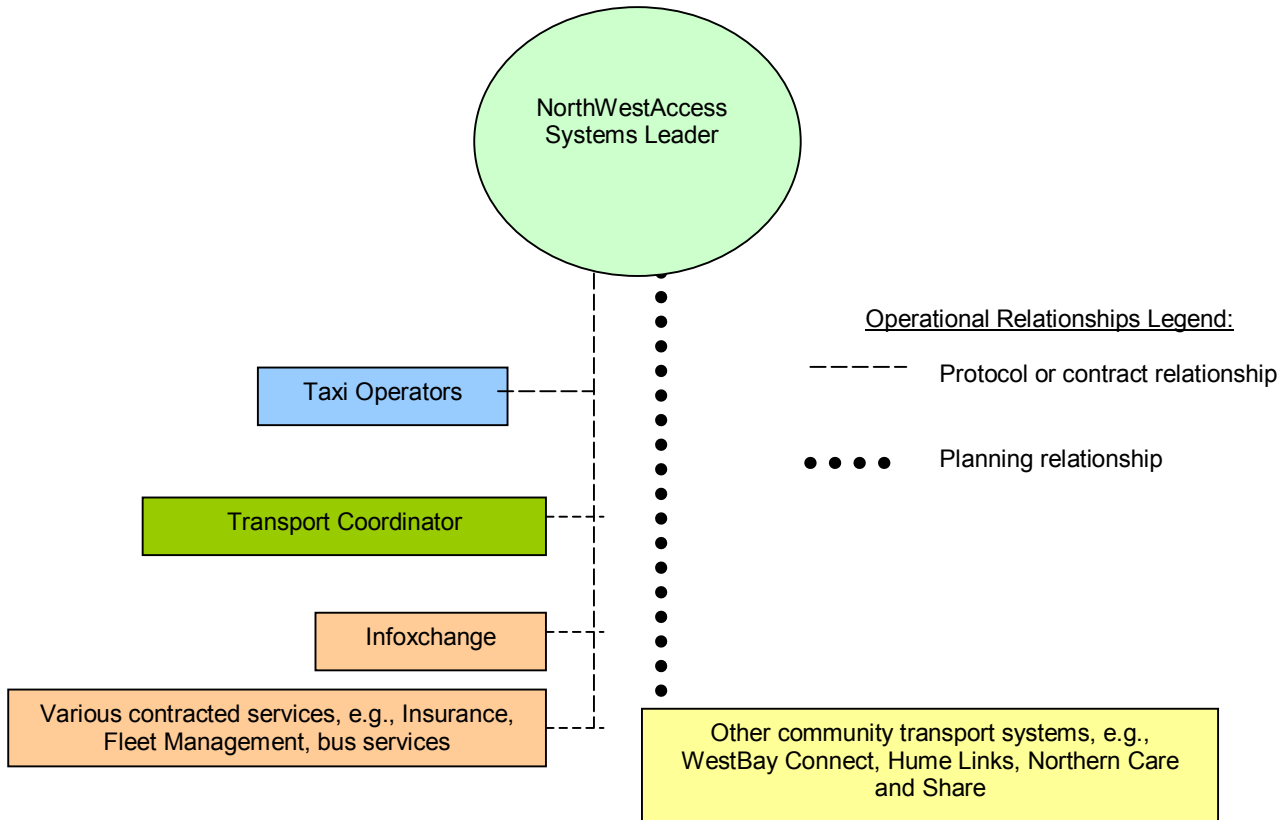
It is the role of the Systems Leader to build and maintain the required systems.

The NorthWestAccess model recognises that transport is not the core business of disability service agencies. Therefore, the various functions involved in the provision of community transport should be outsourced to organisations or providers for which these functions are core business or for which they have specific expertise. For example:

- Infoxchange will develop the coordination management tool, Vehicle Seeker, based on the specifications provided by NorthWestAccess.
- The day-to-day coordination of vehicles, routes and schedules will be outsourced to an experienced organisation.
- Contracts will be negotiated with a range of other service contracts to address the requirements of the participating agencies.

There is a range of other community transport systems in the region and elsewhere in Victoria. The Systems Leader is responsible for developing planning and delivery links with these other systems.

The **operations** of NorthWestAccess are summarised in the following table.



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A phased implementation of NorthWestAccess is proposed, with the major tasks and outcomes detailed in the following table.

<b>Phase One: Intensive Systems Development 6-9 month period</b>	<b>Phase Two: Consolidation and Refinement 12-18 month period</b>
<b>Focus of Systems Leader</b>	
<ul style="list-style-type: none"> <li>• Marketing of NorthWestAccess to disability service agencies</li> <li>• Identifying and addressing efficiency-related issues</li> <li>• Policy, protocol and standards development</li> <li>• Liaison with community and commercial transport services</li> <li>• Identification of coordination opportunities between agencies</li> <li>• Building a regional approach</li> <li>• Establishment of Vehicle Seeker as coordination tool</li> <li>• Developing a volunteer base</li> </ul>	<ul style="list-style-type: none"> <li>• Establish long-term governance</li> <li>• Building cooperative arrangements with other providers: coordination of routes, vehicle sharing, driver training</li> <li>• Further development of Vehicle Seeker as required</li> <li>• Training of NorthWestAccess agencies in use of Vehicle Seeker</li> <li>• Implementation of volunteer framework</li> </ul>
<b>Outcomes</b>	
<ul style="list-style-type: none"> <li>• Governance policies developed</li> <li>• Memorandums Of Understanding with NorthWestAccess agencies</li> <li>• Situational analysis for each agency</li> <li>• Cost efficiencies in place for agencies</li> <li>• Policy and standards framework developed</li> <li>• Formal protocol with taxi services</li> <li>• Coordination framework established</li> <li>• Feasibility of outsourcing coordination determined</li> <li>• Fleet ownership and management options explored</li> <li>• Agencies registered on Vehicle Seeker</li> <li>• Vehicle Seeker specifications developed</li> <li>• Volunteer framework developed</li> <li>• After-hours access framework developed</li> </ul>	<ul style="list-style-type: none"> <li>• Establishment of, or merger with, independent incorporated body</li> <li>• Coordination of driver training</li> <li>• Trial coordination of transport routes, schedules and vehicles via a contracted provider</li> <li>• Use of Vehicle Seeker as the central data management tool for NorthWestAccess</li> <li>• Volunteers recruited and trained</li> <li>• After-hours access for clients available</li> <li>• Cooperative regional arrangements with other community transport systems</li> </ul>

Resourcing and costing to implement the first two phases of NorthWestAccess are included in the implementation plan in this report.

# 1. Introduction

## 1.1. Background

Two compounding pressures led to the implementation of this project:

- (a) People with a disability, their families and carers have continuously raised affordable and appropriate transport as an issue.
- (b) Disability service providers were concerned about the costs, inefficiencies and general difficulties associated with operating or accessing transport options.

To address these issues, the disability peak bodies ACROD Victoria, VICRAID and the Council of Intellectual Disability Agencies (CIDA) obtained funding from the Department of Human Services (DHS) and engaged Evolving Ways to undertake the study.

## 1.2. Project Scope

### Project Purpose

The project aim was to design a coordinated and integrated transport model for use by people with disabilities.

The study focused on DHS-funded disability service providers in the then Western Metropolitan Region (WMR), primarily in the area bounded by the Westgate Freeway (South), Western Ring Road (West), Calder Highway-Tullamarine Freeway (North & East) and St Albans Road. However, agencies that operate outside this catchment but within WMR were included if they showed an interest to be involved.

By the time the project report was finalised the WMR had merged with Northern Metropolitan Region (NMR) to form North-Western Metropolitan Region (NWMR).

### Timeframe

The project research commenced in July 2003 and concluded in December 2003. The report was drafted in December and considered by the Reference Group and then participating agencies between January and March 2004.

## 1.3. Project Management

ACROD provided an executive role for the project, and the day to day project oversight. A Reference Group (membership is provided in Appendix 1) was also established to oversee the project direction and outcomes.

## 1.4. Methodology

### Research Phase

#### Research of other systems and models

A brief literature review occurred early in the project, along with discussion with representatives from other transport systems.

#### Consultation with participating disability service agencies

A number of consultation activities took place with participating agencies. These agencies self selected following an invitation by ACROD Victoria to all DHS-funded disability service organisations to be involved in the study. Nine agencies accepted the invitation to be involved. These agencies, along with others with whom the project team consulted, are listed in Appendix 2.

- An initial forum was held to gauge interest, identify desired outcomes of an integrated transport strategy, identify common issues, and explore potential ideas for a future model
- Telephone interviews were conducted with the nominated representative from each of the participating disability agencies to determine an outline of client transport by agency, specific issues faced by each agency in relation to client transport, examples of good practice, and their potential involvement in future coordinated system
- A cost/route survey was distributed to agencies to determine vehicle cost attribution, driver costs and vehicle downtime. Three of the nine agencies completed this survey
- Two forums were held with participating agencies to discuss findings and explore options for models
- A draft of the final report was presented to participating agencies for consideration and comment.

#### The consumer perspective

Consultation was held with the Western Region Disability Network, which provided three current reports that contained references to transport issues as identified by people with a disability, their families and/or carers:

- Community Transport discussion paper July 2003
- Regional HACC (Home and Community Care) Growth Funding Priorities 2002/2003
- Identification of Service Gaps for People with a Disability and Carers in the WMR July 2000.

#### Consultation with others

Consultation also occurred with the Victorian Taxi Association, Victorian Taxi Directorate, Local Government Areas in the study area, and the Department of Human Services (Disability Services Branch and WMR).

### **Model Development**

A model was developed and presented to the project Reference Group for consideration. The model was developed in light of the analysis of data findings and in consideration of the perspective of the participating agencies, as emerged during the surveys and forums.

The model was then presented to participating agencies for consideration and comment.



## 2. Good practice and innovation elsewhere

### 2.1. Literature Review

#### What is community transport?

Community transport is defined by several characteristics, including:

- The service is provided for passengers who meet the criteria for transport disadvantage. This can include people with a disability who are unable to use conventional transport systems; people who live where conventional transport systems are not available; and people who need to access community facilities and resources that are not available within the hours when conventional transport systems operate<sup>1</sup>.
- Provided by organisations that are not-for-profit and/or community based and/or funded by government
- Provided in either a car or bus, and generally pre-booked.

Community transport exists across Victoria; although there is great variability in the funding source, quality, local support, role and reach<sup>2</sup>.

Perhaps another way of defining community transport is to think of it as being about independence, quality of life, connecting people, safe mobility for life and being the key for people with a disability to participate in society<sup>3</sup>.

The Queensland Council of Social Services (QCROSS) conference *Delivering Flexible Transport – Showcasing the way forward* focused on the concept of 'flexible transport'. In a summary of the conference themes, Watters<sup>4</sup> outlined the major features of this concept:

- Adaptive transport somewhere between cars and fixed route transit
- Personalised at affordable price
- United States and Swedish examples point to neighbourhood flexible services and reducing demand for higher cost, more specialised modes
- Use of smart technologies
- Needs to be integrated and seen as part of the whole travel chain
- Accessible vehicles
- People friendly standards
- People centred drivers
- Engaged stakeholders.

## Models

Table 1: Outline of Community Transport models identified in literature 1997-2003

Identified issues	Options and/or model
<b>1. Upper Hume Region (1997)<sup>5</sup></b>	
<ul style="list-style-type: none"> <li>• Service providers know little about each other's schemes</li> <li>• There is a need for after-hours transport</li> <li>• There is an increasing demand to travel to larger centres, as health services are regionalised</li> <li>• Most schemes do not have vehicles with a wheelchair hoist</li> </ul>	<p>The proposed model features coordination and cooperation that enable the schemes to organise in 3 domains:</p> <ul style="list-style-type: none"> <li>• policy and funding issues</li> <li>• information, networking and training</li> <li>• improvements to individual schemes</li> </ul> <p>The authors propose a staged implementation, with the development of a central brokerage service to better use all vehicles as a medium term achievement. The model suggests the development of a centralised booking service in the longer term.</p>
<b>2. Ballarat (1997)<sup>6</sup></b>	
<ul style="list-style-type: none"> <li>• Lack of coordination and cooperation, inhibiting effective use of resources and personnel</li> </ul>	<ul style="list-style-type: none"> <li>• Transport brokerage program should be extended to a 60 km radius from Ballarat</li> <li>• Shire boundaries within that zone should be ignored for transport coordination</li> <li>• A full-time transport broker / regional coordinator should be appointed</li> <li>• An independent financial analysis should be undertaken within 6 months of implementation</li> <li>• Although volunteer drivers are used, other costs need to be tracked</li> <li>• If trial proved effective and financially sound, coverage should be extended. A major commitment by all agencies involved is necessary to make the system work efficiently.</li> <li>• Need for centrally located / controlled wheelchair-accessible vehicle(s)</li> <li>• Suggestion that other government departments, e.g. Education, could provide use of vehicles during 'down times' by way of a transport brokerage pool.</li> </ul>
<b>3. HACC Transport Strategy Loddon Mallee Region (1998)<sup>7</sup></b>	
	<p>A range of models were proposed, including:</p> <ul style="list-style-type: none"> <li>• Consumer based models in which friends or family transport the person and are reimbursed for costs</li> <li>• Expanding existing volunteer transport schemes</li> <li>• Integrated bus services between HACC and commercial operators</li> <li>• Transport brokerage through the coordination of vehicles or purchasing time from other agencies and services</li> <li>• HACC subsidised taxis</li> <li>• Improvement in public transport through coordinating fixed routes, timetables and community transport, etc.</li> </ul>

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Identified issues	Options and/or model
<b>4. South West Victoria (1998)<sup>8</sup></b>	
<ul style="list-style-type: none"> <li>• Disparate nature of communities</li> <li>• Costs of developing a viable program</li> <li>• Distances to be travelled</li> </ul>	<p>Four models of community transport provision were considered, with the preferred model having a full-time coordinator with responsibility for:</p> <ul style="list-style-type: none"> <li>• Development and maintenance of commercial and community transport database</li> <li>• Negotiation and brokerage of transport with commercial and community organisations</li> <li>• Advocacy for improvement and expansion of transport services</li> <li>• Transport education – funding, activity, issues, social policy and insurance matters</li> <li>• Identification of gaps in current service provision</li> <li>• Use of brokerage funds to assist development of new / additional services</li> </ul>
<b>5. Stanthorpe Community Transport Project (1998)<sup>9</sup></b>	
<ul style="list-style-type: none"> <li>• Lack of coordination</li> <li>• Lack of information</li> <li>• Reliance on family and friends</li> <li>• Cost of existing transport</li> <li>• Lack of personal assistance when travelling</li> <li>• Limited access to wheelchair-accessible vehicles</li> <li>• Need to get to larger centres for shopping, medical appointments</li> </ul>	<p>The recommended model combines direct and indirect services. Indirect services include assessment of difficulties, information and assistance to arrange transport and of appropriate services. Direct services include recruiting and use of volunteers.</p> <p>The model uses a community development approach, which includes:</p> <ul style="list-style-type: none"> <li>• Better use of existing resources including commercial, not-for-profit, family, etc.</li> <li>• Community participation in service delivery, planning and evaluation</li> <li>• Collaboration and cooperation between providers</li> <li>• Facilitation of independence and self power for individuals and groups, with a view that provision of transport by the Blue Nursing Service would be the last, not the first option</li> <li>• Consideration of social and health contexts of transport</li> </ul>
<b>6. Belfast – theory and practice (1998)<sup>10</sup></b>	
<ul style="list-style-type: none"> <li>• Private operators perceive unfair competition</li> <li>• Little interaction between private and community operators</li> <li>• Many vehicles had a low utilisation rate (annual average of 21,000 km)</li> <li>• Sample of vehicles revealed poor ergonomics design, vehicle maintenance, safety and legal compliance</li> <li>• Limiting factors:             <ol style="list-style-type: none"> <li>1. Cost</li> <li>2. Availability of suitable vehicles</li> <li>3. Availability of suitable drivers</li> </ol> </li> <li>• Main problem facing funders and operators is the lack of adequate evaluation systems</li> </ul>	<p>The authors put forward the following views:</p> <ul style="list-style-type: none"> <li>• That it is not how transport is organised that is the critical issue but the availability of suitable affordable transport</li> <li>• Local, small community operators can deter inter-community use of vehicles</li> <li>• Small operators suffer regular investment crises</li> <li>• Small operators suffer from inefficient scheduling, inability to provide back-up and emergency coverage</li> <li>• Larger city-wide projects are as effective at attracting volunteers as small operators</li> <li>• Larger schemes are likely to be more stable over time</li> <li>• A city-wide scheme can provide more equal access across the community whilst targeting special areas and groups</li> </ul>

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Identified issues	Options and/or model
<b>7. La Trobe Valley (1998)<sup>11</sup></b>	
<ul style="list-style-type: none"> <li>• Need to integrate transport for HACC target group into the broader generic transport framework</li> <li>• Need for a community approach to planning and evaluation</li> </ul>	<p>The model outlines:</p> <ul style="list-style-type: none"> <li>• 3 distinct services of the community transport 'core'; <i>Fleet management, Central coordination and Transport companions (volunteers to assist with mobility)</i></li> <li>• 6 main functions within these 3 services; <i>Management of fleet, Dispatch, Management of drivers, Coordination, Service development, Management of transport companions</i></li> <li>• 3 options for the ownership and management of the fleet, none of which are mutually exclusive</li> </ul>
<b>8. Community Transport System – Colac (2000)<sup>12</sup></b>	
<ul style="list-style-type: none"> <li>• Increasing expectations on agencies</li> <li>• Transport provision is human resource intensive</li> <li>• Limited public transport options</li> <li>• Limited opportunities for recreation and leisure activities for people with disability, due to lack of access to transport</li> <li>• High level of expenditure on transport</li> <li>• Perceived dependence on day service agencies for transport perpetuates the view that transport is a welfare rather than community infrastructure issue.</li> <li>• Most vehicles under-utilised</li> <li>• Each agency operates its service separately, resulting in numerous crossovers and duplications with other agencies</li> </ul>	<p>Model based on some critical philosophies and approaches:</p> <ul style="list-style-type: none"> <li>• Transport is a community infrastructure issue, not a welfare issue</li> <li>• The community overall, with support from all levels of government, has the responsibility to solve access-related issues</li> <li>• Provision of transport by community-based organisations is the provision of last resort. All other avenues should be explored and used first</li> <li>• Transport solutions are developed through a community development approach</li> <li>• Commercial operators are important contributors</li> <li>• Solutions should be many and varied</li> </ul> <p>A coordinator would be responsible for ensuring that five key functions occur:</p> <ol style="list-style-type: none"> <li>1. Linking people to existing transport services, programs, information and aids</li> <li>2. Brokering of transport</li> <li>3. Coordination of transport</li> <li>4. Systems advocacy</li> <li>5. Provision of transport and mobility assistance where other services do not exist</li> </ol> <p>The model proposes three fleet options:</p> <ul style="list-style-type: none"> <li>• Fleet owned and operated by individual agencies but contracted to the community transport service during non-peak periods</li> <li>• Fleet owned by individual agencies but managed by the community transport service</li> <li>• Fleet owned and operated by the community transport service</li> </ul>
<b>9. Yarra Ranges Transport Project (2000)<sup>13</sup></b>	
<ul style="list-style-type: none"> <li>• Low population density over large area</li> <li>• Limited or non-existent public transport</li> <li>• Half of Shire's roads are unsealed</li> </ul>	<p>A coordinated community transport system was proposed for Yarra Ranges, including:</p> <ul style="list-style-type: none"> <li>• Establish an office and provide a central contact number</li> <li>• Coordinate a directory of transport information and disseminate from central access point</li> <li>• Coordinate regional training programs</li> <li>• Coordinate referrals, linked to a central database</li> <li>• Develop referral protocols</li> <li>• Promote the community transport network developed during the project</li> <li>• Establish a transport register for Yarra Ranges and link to that of Lilydale area</li> </ul>

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Identified issues	Options and/or model
<b>10. Barwon Community Transport Strategy (2000)<sup>14</sup></b>	
<ul style="list-style-type: none"> <li>• Community transport options provided in relative isolation from each other</li> <li>• Limited options for people at night or weekends</li> <li>• Many vehicles under-utilised and not used at all for significant parts of a day or week</li> <li>• Poor access to information about available transport options</li> <li>• There are broader groups in the community who are transport disadvantaged but unable to access any of the current community transport options</li> </ul>	<p>The model is aimed at people who are transport disadvantaged. It incorporates a strong community development and systems advocacy approach.</p> <p>Commercial operators are integral to the system, at both operational and planning levels.</p> <p>There is an over-arching structure for the sub-region with capacity to respond to local characteristics and needs.</p> <p>A number of principles to guide the development of a model:</p> <ul style="list-style-type: none"> <li>• Community transport promotes individuals' participation in the community</li> <li>• Community transport is available on the basis of need, for people who are transport disadvantaged</li> <li>• A central coordination mechanism, based in the community</li> <li>• Covers the whole Barwon sub-region</li> <li>• Systems issues are addressed across the sub-region</li> <li>• Local advisory groups advise on local issues, helping to develop local solutions</li> <li>• Transport resources are administered in a local area, and are as close as possible to the users</li> <li>• Responses involve both the not-for-profit and the commercial sectors</li> <li>• Resources are identified from a range of sources including government funding, volunteer and business input</li> <li>• The functions of community transport are undertaken by, or in partnerships with, organisations that have those functions as core business</li> </ul>
<b>11. TransLink – South East QLD (2003)<sup>15</sup></b>	
<p>Public transport issues:</p> <ul style="list-style-type: none"> <li>• Lack of integrated ticketing and fares</li> <li>• Past contracts not supportive of flexibility</li> <li>• Low demand situations not commercial</li> <li>• Marginal cost of running standard buses</li> <li>• Quality of small bus fleet</li> <li>• Cost of booking systems</li> </ul> <p>What was needed</p> <ul style="list-style-type: none"> <li>• Planning outside the square</li> <li>• Improving the interchange experience - information, facilities, coordinated timetables</li> <li>• Contracts support flexible options</li> <li>• Operators willing to innovate</li> <li>• Planning the taxi into the transit system</li> </ul>	<ul style="list-style-type: none"> <li>• Guidelines and standards for TransLink operations</li> <li>• Infrastructure upgrades - rail, bus-ways, bus priority</li> <li>• Inter-modal facilities – interchanges and park 'n' ride</li> <li>• Services Plan - including new, enhanced and integrated services</li> <li>• Implementation Plan</li> <li>• Focus on demand rather than supply</li> <li>• Target system resources to better meet needs</li> <li>• Adapt services to changing demands (in time and space)</li> <li>• Increase choices - integration is a key to flexibility</li> <li>• Flexible routes introduced at non-peak periods, with line-haul routes consolidated</li> </ul>

Identified issues	Options and/or model
<b>12. Transport Connections (2003)<sup>16</sup></b>	
<ul style="list-style-type: none"> <li>• Need to develop local systems</li> <li>• Need to more efficiently use local resources</li> <li>• Minimal or non-existent public transport</li> <li>• Need for a whole-of-government approach</li> </ul>	<p>The key objectives of Transport Connections are to improve access and mobility for people in rural and regional Victoria by:</p> <ul style="list-style-type: none"> <li>• Making better use of existing transport resources through new and coordinated approaches</li> <li>• Facilitating dialogue between the community, transport providers and local businesses to develop tailored transport solutions</li> <li>• Strengthening links between the community and public transport sectors</li> </ul>

### Current influences

Speakers at the 2003 QCROSS conference identified a number of current issues that are presently influencing the development of community transport<sup>17</sup>:

- An increasing demand for discretionary and complex trips, due to dispersed urban population and diverse timing and locations of trips
- Public transport is traditionally 'disconnected' from such discretionary needs
- Consumer choice is for community transport that approximates the flexibility of a car (and other features such as price, reliability, speed, and comfort). Clear consumer demand for safe and secure transport options
- A gap is therefore emerging between traditional public transport and private models of mobility. This represents opportunities for community transport model development.

### Common elements of community transport models

#### Strategic thinking and model development:

- Focus on demand rather than supply
- Identification of gaps in current service provision
- Development of new/additional services
- Guidelines and standards for community transport operators
- Use of flexible routes during non-peak periods utilising vehicles from a local pool of resources
- Consolidation of fixed routes during peak periods
- Evaluation of model implementation, including constant user feedback.

#### Financial considerations:

- Monitoring of costs
- Addressing vehicle replacement.

Service coordination:

- Centrally located/controlled wheelchair-accessible vehicles
- Commercial and community transport database
- Sharing and/or pooling of vehicles, with agencies having a choice to continue to own and manage their own fleet or negotiate a mutually suitable hand over to the coordinating organisation
- Brokerage of transport with commercial and community organisations
- Coordination of training programs
- Coordination of quality assurance and vehicle accreditation
- Promotion and education
- Facilitating dialogue between community, transport providers, government and local businesses to develop tailored transport solutions.

Participant commitment to:

- Thinking 'outside the square'
- Collaboration and cooperation between transport providers
- Increasing choice for 'customers'
- Making better use of 'system' resources
- Ignoring bureaucratic boundaries for the purpose of transport planning.

## **2.2. Good practice tool – Vehicle Seeker**

### **What is it?**

Vehicle seeker is an online community transport coordination system. Agencies upload their information about available vehicles, and clients or agencies can search using time/location/vehicle characteristics criteria.

The system provides users with a time and cost efficient way to search, request and administer vehicle vacancies and resources in real time.

Vehicle Seeker can be viewed at <http://northern.transportseeker.org.au/>

### **Benefits**

- On-line management means real-time data
- Linked to Infoxchange Service Seeker

- Provides comprehensive service demand reports
- Coordination and management of vehicle availability
- Simple and easy to use
- Online updating of vehicle and booking management
- Incorporates regional and agency specific policies and protocols.

### **Who owns and maintains Vehicle Seeker?**

The system is currently owned and maintained by Infoxchange Australia, a not-for-profit social enterprise company focusing on community development using information technology.

Services are offered to the not-for-profit sector that includes computer recycling, internet service provision, database and online information/content management to web site design and hosting a wide curriculum of computer training.

### **Where is it used?**

#### Northern Care and Share

Vehicle Seeker was originally funded by DHS and developed by Northern Care and Share Incorporated and Infoxchange Australia. Northern Care and Share operates across the Northern Metropolitan Region. Services focus on community transport, social support services and volunteer assisted services.

Vehicle Seeker, as used by Northern Care and Share is a base model consisting of a vehicle availability register allowing live, online requests and bookings of vehicles. The system allows users to request, book and maintain transport resources in real-time.

Regional community transport guidelines and service specific policy and procedures of lending agencies are displayed on the system. Users are prompted to read these prior to completing a booking request and faxing a signed agreement.

#### Hume Transport Links

Hume Transport Links is a joint initiative of Northern Care and Share and the Brotherhood of St. Laurence. The project is overseen by the Municipal Community Transport Group, with representatives from the City of Hume, Northern Care and Share, community transport providers, the Local Learning and Employment Networks (LLENS), public transport providers, Department of Infrastructure (DOI), DHS, service users, local businesses and community health services.

The project comprises three stages that will result in a coordinated and integrated community transport service for residents of the City of Hume.

A Transport Coordinator, who will be engaged by Northern Care and Share, will use the Vehicle Seeker database to manage transport routes by scheduling community transport 'pick-up' times for consumers and inform service operators of these details.

Vehicle Seeker, as used in the Hume Transport Links will also allow consumers and referring organisations to examine the service timetable and to book transport.

### Westbay Connect

Westbay Connect is a project that commenced in Wyndham Local Government Area (LGA) and has expanded to Hobson's Bay and Maribyrnong LGAs – to align with the Westbay Primary Care Partnership (PCP). The project is jointly funded by Home and Community Care (HACC) and the LGAs.

The objective of Westbay Connect project is to implement the coordination of under-utilised community and transport resources in the community, across the Westbay PCP.

Using Vehicle Seeker, Westbay Connect will develop a Community Transport Register. The Register is a centrally coordinated dataset of public, private and community transport resources.

The Register receives requests for transport access from service providers and clients, and attempts to match requests using the available community infrastructure and resources, contained in the Westbay Connect database.

The Register aims to:

- Promote accessibility to existing community transport resources and services for transport disadvantaged persons, through a planned and coordinated operating system
- Promote the effective utilisation of community vehicles during non-peak times, through a coordinated management system
- Develop an accessible pool of trained volunteer drivers and assistants, to support the implementation of the Community Transport Register and Westbay Connect transport programs
- Provide a central referral and bookings point
- Promote community awareness of community transport resources.

### **Is Vehicle Seeker suitable for disability service organisations?**

Infexchange has advised that the website infrastructure of the Westbay Connect site is suitable for the inclusion of vehicle information from disability service providers.

Although the Westbay Connect site is primarily HACC driven, the HACC target group includes people with disabilities and their carers. Further, it has been based on the platform developed for the Northern Metropolitan Region Vehicle Seeker that is a disability-focused service.



## 3. Emerging themes

### 3.1. Vehicle usage

Participating agencies reported a number of good vehicle usage practices. For example:

- Agencies with both day services and accommodation services ensure vehicles are available to the accommodation services during weekends and holidays
- Some organisations make their vehicles available to other agencies
- All agencies report maximum, or near maximum capacity of vehicles when they are used
- Some agencies have, or are currently reviewing all vehicles with a view to better match vehicle type with actual need, improve usage and gain efficiencies.

Good usage of vehicles is cost-effective. There is no current Victorian benchmark for vehicle usage. However, a United Kingdom community transport research paper<sup>1</sup> indicates that a low utilisation rate is 13,000 miles (21,000 kilometres) per year. This is an average of 1,733 kilometres per week.

While agencies that participated in the study reported attempts to ensure vehicles are well used, the study findings suggest that most vehicles fall, or are likely to fall, far short of a cost-effective rate. For example, the sample of agencies that completed the questionnaires indicated typical kilometres per week ranging from 300 – 562, and only a few agencies have arrangements for vehicles to be used after-hours, or on weekends and holidays. Even amongst the agencies reporting good usage practices, the take-up rate does not appear to be always sufficient to result in a cost-effective usage rate.

Agencies sometimes perceive that accreditation prevents them from sharing their vehicles with others. Bus Operator Accreditation, introduced in 1999 by the Department of Infrastructure, requires operators with vehicles that have 13 or more seats to be accredited under Victorian State law. Operators must:

- Ensure accredited drivers operate the vehicle
- Maintain a management system including programmed vehicle maintenance, vehicle inspections and defect reporting
- Maintain a management information system consisting of a driver monitoring program, a fleet register, an emergency plan, a mobility enhancement strategy, a public complaints register, and a system of reporting notifiable occurrences to the Department of Infrastructure.

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<sup>1</sup> Taylor, J. & Lavery, I., "Evaluating Community Transport in an Urban Area – Theory & Practice" *Conference Proceedings on Transport & Mobility for elderly & Disabled People*, Vol. 1, Indomed Pty. Ltd. 1998.

The requirements of the law are perceived by agencies as fair in terms of good standards. At least one agency that does not have such large vehicles is developing its own standards using the Bus Operator Accreditation as a guide.

However, amongst the disability service agencies, the availability of licensed drivers is limited. A number of agencies have, or are moving towards, smaller seating capacity vehicles because a broader range of people can drive these.

This move is also in line with the increasing consumer choice for vehicles that approximate the flexibility of a car (refer to current influences on page 10).

*The project team suggests that more of the disability agencies could therefore consider moving toward smaller vehicles. Alternatively, for those agencies that believe the 13+ seater vehicles best meet the needs of their client group, strategies that might help increase the pool of drivers, and therefore help address the issue of sharing of vehicles, include:*

- *Collaboration with other agencies that have licensed drivers*
- *Developing working relationships and protocols with commercial providers with licensed drivers*
- *Providing additional training options to increase the pool of qualified drivers.*

*Pooling of vehicles can assist in better vehicle usage because they can be made available to other agencies and service users. The project team suggests that agencies could have a number of options in relation to their fleets. None of these is mutually exclusive allowing an agency to choose an option best suited to its situation. For example:*

- *An agency could continue to own and manage its own fleet, making vehicles available through protocols to other agencies during non-peak times*
- *An agency could continue to own its own fleet but outsource the management and coordination*
- *An agency could sell its fleet to a coordinating entity, negotiating usage for its agency and service users.*

### **3.2. Efficiencies**

The cost of providing client transport was a recurring theme amongst the participating agencies. The impact on agency budgets can be a disincentive for trying to work together. Agencies report that, at the very least, any future coordinated model must not add further financial cost, and preferably offer up savings through efficiencies.

Agencies have implemented strategies to reduce the costs of client transport. For example:

- Some agencies indicated that they constantly juggle routes to reduce the costs to the agency and client
- One agency reported using its van in outer parts of the region and taxis (where clients use concession cards to reduce costs) in the inner areas to save money

- Another agency has introduced user fees for long trips associated with recreational activities
- Another agency reported having a different pricing structure for clients whose choice of program takes them beyond a given distance
- Two agencies have recently reviewed transport across the whole of their organisations, gaining efficiencies via improved coordination.

*The project team suggests:*

1. *That the formation of an alliance between the agencies has the potential to yield a range of financial benefits. For example:*

- *Fleet discounts for new vehicle purchases through improved purchasing power*
- *Common vehicle registration expiry date aids in reduction of administration time and assists with improved cash flow budgeting*
- *Negotiation of reduced costs for Advanced Driver training schemes*
- *Discounted fuel costs – most petrol companies offer loyalty discount programs over and above the current Coles Express and Safeway Plus discount vouchers, e.g., BP offers 2 cent discount on at-pump prices for all LPG vehicles*
- *Preferred provider status with Motor Vehicle Service Centre would result in lower maintenance and repair costs*
- *Reduced administration time*
- *Insurance premiums – subject to claims history, new premiums can be negotiated through either March Pty. Ltd. or Aon Risk Services, which would share risk between agencies, thus resulting in reduced premiums. Amalgamation of other insurance policies into one policy could result in further savings.*

2. *Outsourcing of fleet management could result in a range of service options being made available:*

- *Ownership options – leasing (operating or financing), financing, Hire Purchase*
- *Provision of replacement vehicles*
- *Lower overheads*
- *Discounted fuel and maintenance prices*
- *Link into tracking system for scheduling*
- *On-road service*
- *Extend beyond vehicles used for clients.*

### **3.3. Agency role in transport**

Many agencies commented that providing transport for their clients had a number of benefits. These included clients having access to low cost, safe and reliable transport; drivers (usually agency staff) were able to establish a face-to-face relationship with families; and the provision of a guaranteed service.

Although these benefits were widely perceived, there was also recognition that transport is not a core function of agencies, and agencies have been working to change the expectations of the client group. For example:

- For new clients living more than 10 km away from the service, one agency now charges a per-kilometre rate equivalent to the standard taxi rate. Some clients have agreed to pay this. This has enabled the assignment of transport to an area where a number of new clients live
- Some agencies reported that alternative transport services are examined for all new clients
- Agencies report that, where appropriate and possible, clients are encouraged to use public transport to and from day programs
- All agencies that participated in the study reported using taxis, where possible.

While agencies were aware of the need to reduce client dependence on agency transport, a number of things are contributing to increase pressure on agencies to provide more transport services, not less. This pressure comes from:

- In many areas, public transport services were regarded as either non-existent or unsuitable in the current form
- Some agencies experience lengthy waiting times for taxis
- The increasing use of individualised funding packages such as HomeFirst means clients are seeking a more flexible range of services within the community delivered at any time of the day and week.

*The project team suggests that participation in a coordinated community transport system could help improve access to community facilities and services.*

### **3.4. Use of taxis and other commercial operators**

Although a number of agencies commented on long waiting times and unreliable service, most continued to use taxis to supplement transport services.

Some agencies have spent time building up positive cooperative relationships with taxis, choosing to do so direct with owner operators. For example:

- One agency reported it has informally guaranteed regular work for taxis and in return had access to the same drivers and relatively reliable service over a number of years

- Most agencies reported being prepared to continue developing their relationship with taxis and other commercial operators
- One agency has regular informal meetings with taxi operators, an ongoing relationship with the Victorian Taxi Directorate and Victorian Taxi Association, and has established formal protocols. This helps provide a reliable structure around arrangements.

The Taxi Directorate advises that there is no obvious legal impediment to the development of formal protocols with agencies. They recommend their input to a protocol prior to implementation to ensure its legality, especially in relation to licence conditions and the use of government-subsidised travel cards.

The Taxi Association likewise, indicated an interest in supporting any process of negotiation between disability service agencies and taxi services, which they advise would need to occur at three levels:

- Taxi licence owners
- Individual driver operators
- Taxi companies. There are three major taxi companies in the north-western suburbs: Western Suburban Taxis, Silver Top, and Northern Suburban Taxis.

Generally, agencies have not built a working relationship with bus operators.

*The project team suggests that the success some agencies have achieved through building positive ongoing relationships with taxi operators and developing formalised protocols is worthy of wider application.*

*Consideration could also be given to exploring potential opportunities with bus operators, which might include:*

- *A bus operator managing the fleet, providing a complete service both in and outside peak times*
- *Bus companies being linked to community transport routes to achieve improved 'whole-of-chain' transport.*

### **3.5. Financial issues**

Agencies depreciate their vehicles. Generally, however, they do not make provision for replacement or expansion of their fleets.

*The project team suggests that agencies could:*

- *Review financial practices to include vehicle replacement*
- *Explore ways in which agencies might collaboratively provide a pool of funds for replacing pooled vehicles.*

### 3.6. Limited cooperative arrangements

The literature review found that agencies tended to have minimal interaction with private transport providers and little knowledge of other community transport schemes. This was confirmed in this study. For example, agencies reported some knowledge of other services but little interaction between them in relation to planning for, or delivery of, community transport.

The rationalisation of routes between services was something some agencies had thought about but at the time of the interviews had not been actively pursued. One agency reported having tried to cooperate with another by picking up a client who lived close to their route. Unfortunately this was not successful because the two agencies had not developed a process for addressing issues when they arose.

In principle, agencies accept the importance of joint planning and cooperative service delivery arrangements. However, transport remains largely an internal planning issue for services, rather than one they plan with others. Agencies reported a number of reasons for this including:

- They are concentrating strategically on the demands of core business
- Transport can be a 'sleeper' issue that only arises when it has a financial impact, such as at vehicle replacement time
- Building and maintaining collaborative relationships requires intensive resourcing, which is often not available to an agency, especially when the issue, in this case transport, is not core business.

The need for inter-departmental cooperation was highlighted by an agency that had tried to share and coordinate transport with a local specialist school. The agency tried to negotiate transport via the school bus for one of its clients whose sibling attended the specialist school and used the school bus. A coordinated approach would mean a single pick up for the family and efficiencies for the agency. However, school bus contracts are let at a departmental level and such changes are not within the mandate of the local school.

This agency advocated strongly for the inclusion of local specialist schools in the future coordinated transport system. This will only be achieved, however, if such inclusion is actively supported through cooperative arrangements between the two relevant government departments.

*The project team suggests that the importance of inter-departmental cooperation, including a more flexible approach to the use of school buses, be recognised in any future arrangements.*

### 3.7. Drivers

Only three of the participating agencies use paid drivers. These agencies commented on the difficulties of recruiting and retaining drivers.

The remaining agencies use paid staff as drivers, usually as part of rostered time. The use of staff was perceived by the agencies to be an expensive way to provide drivers, and that it generally results in the loss of program time.

Most agencies reported that driver training was a constant issue and, as noted on page 16, there are additional difficulties where accreditation is required.

*The project team suggests that a collaborative approach by agencies to addressing the issue of driver recruitment and training could be of benefit. Approaches could include:*

- *Drivers working across disability service agencies*
- *Joint training sessions*
- *Development of common standards*
- *Developing relationships and protocols with other community transport services with a view to sharing drivers*
- *Exploring with commercial operators how their expertise and pool of drivers might be accessed by disability service providers*
- *Collaboratively building up a volunteer driver base to complement existing arrangements.*

### **3.8. Need for more client-responsive transport**

The literature review indicated a need for flexible transport options to maintain client mobility as long as possible. However, the issues of cost, limited access to specialist vehicles, and lack of information about transport options meant there was a reliance on friends and family.

The 2003 QCOSS conference on flexible transport found that there is an increasing demand for discretionary and complex trips. This is coming about due to a dispersed urban population, the diverse timing and locations of trips, and consumer choice for community transport that approximates the flexibility of a car (and other features such as price, reliability, speed, and comfort).

Reports provided by the Western Region Disability Network found that transport enabled people to more fully participate in the community, including recreation programs during weekends, semester breaks and evenings. However, the reports indicated that there was no mention in any policy document of a whole-of-Government approach to addressing transport. For example, the Implementation Plan of the State Plan does not outline any strategies for the Department of Transport to improve public transport for people with a disability.

Service delivery for people with a disability is moving toward a more individualised approach. Programs such as HomeFirst, and the person-centred planning advocated in the State Plan, have meant that several agencies in this study are now faced with assisting clients to access services and facilities at variable times throughout the day and week. This can mean helping clients find suitable transport options after-hours and on weekends. However, agencies reported a lack of reliable, affordable options after-hours and during weekends, especially options that encourage an individualised approach.

*The project team suggests that participation in a coordinated community transport system could help improve access to community facilities and services.*



## 4. Implications for potential models

The findings indicate that agencies have a number of common issues in relation to transport, among them a focus on reducing costs associated with transport and the need to rationalise routes. However, no formal mechanisms are in place to rationalise routes among a number of agencies. In addition, it is likely that cost savings could be negotiated for such items as vehicle maintenance and insurance if the agencies worked as a group rather than individually.

*This indicates that the model should be based on **collaboration** between the agencies.*

There was recognition among agencies of their role in ensuring that people with a disability are involved in the community and have individualised lifestyles. In terms of this project, all agencies were aware of the key role of transport in enabling this to occur. At this point however, agencies are strongly focused on internal cost issues associated with transport. Addressing agency cost pressures is an important first step and can help gain agency involvement in a staged process of community transport capacity building.

*This indicates the need for a **phased model**, with the initial phase focused on agency cost pressures associated with transport.*

Vehicle Seeker can be developed to provide a 'coordinator' with:

- A simple-to-use and timely on-line coordination tool to manage transport routes
- Access to vehicles during 'down time'
- A volunteer database
- Vehicle demand data that can assist with planning.

*This indicates that **Vehicle Seeker** should be a part of this model as the significant coordination and data management tool.*

It is also designed to provide people in the community with ready on-line access to vehicles during 'down times'. The development of Vehicle Seeker in the bulk of the local government areas that surround the study catchment provides an opportunity for later integration with the broader community transport systems.

While Vehicle Seeker allows people in the community to access vehicles during 'down times', not all people with disabilities have on-line access. Inclusion of a central telephone number that links the caller with a person who can use the Vehicle Seeker online tool on their behalf could provide a useful service. To ensure out-of-hours access to Vehicle Seeker in a cost efficient way, it might be possible to negotiate with an existing out-of-hours telephone service such as WiN Support Services' Emergency After Hours Respite Service.

*This indicates that a **central telephone service 24/7** should be part of this model*

Taxis are an important part of a transport system. Agencies reported that they have been building relationships with taxi services for a number of years. It is timely therefore that the relationship between agencies and taxi services is formalised through protocols that address issues such as bookings, driver allocation and waiting times.

*This indicates that the model should establish **formal protocols** with taxi services.*

The role of disability services agencies in the provision of transport was questioned by many agencies. It is clearly not part of core business. Staff within disability service agencies have to spend considerable time involved in coordinating transport routes, managing transport maintenance, designing and overseeing driver training, negotiating insurance, and so forth. Agencies should be able to collaborate to identify such common functions that could be contracted out to specialist organisations, which may result in cost savings per agency, and/or allow them to concentrate on their actual business.

*This indicates that the model should include the **contracting out** of specialist functions to organisations with relevant expertise.*

## **5. The proposed transport strategy: NorthWestAccess**

### **5.1 Underlying principles**

A set of principles has been established to help guide the development and implementation of NorthWestAccess. They have been drawn from a combination of views and ideas expressed by participants during the initial forum, the telephone surveys, and the literature.

*Community inclusion* – Transport is a critical means for people with disabilities to participate and be involved in the community, which is an essential quality-of-life outcome.

*Individualised lifestyles* – Varied and flexible transport and mobility options that provide choice enable an individual approach.

*Building capacity* – The way in which community transport is provided should help increase the capacity of individuals to get around their community, when and how they need. It should help improve the capacity of the system to respond to needs in a timely and individualised manner. It should help increase the capacity of the community to identify its issues and find appropriate solutions.

*Multi-dimensional* – People’s transport and mobility needs are best met through a variety of options, including both direct and indirect services.

*Transport and mobility* – People’s capacity to move around and be involved in their community relies on both access to transport and attention to issues of mobility.

*Safe and reliable* – Transport services must be safe and reliable so that people can confidently use them.

*Collaboration* – A comprehensive transport system requires agencies to work together and with other providers, both commercial and not-for-profit.

*Core business* – The functions of community transport are best operated by organisations that have such functions as core business.

*Integrated with the broader community transport system* – Community inclusion is enhanced when transport and mobility services are linked to, and part of, other community transport systems.

*Aligned with public transport* – Community transport is a form of public transport, the cost of which should be shared between taxpayers and community transport users in a way similar to general public transport.

## 5.2 Target group

In the initial stages, the target group for the community transport strategy is people with disabilities living, or accessing services, within the particular catchment area of the North-Western Region.

Later, as the strategy matures and integrates with broader community transport services, the target group may be broader, to capture all people in the North-western Region who are transport disadvantaged.

## 5.3 An overview of the model

### Focus

The proposed transport strategy (NorthWestAccess) has a focus on developing improved transport and mobility systems through:

- a) Collaborative planning
- b) Establishing mechanisms for coordinating the operations of participating agencies
- c) Systems advocacy.

Initially, the strategy's priority will be helping to address the immediate transport issues faced by participating disability service agencies.

Over time, the focus matures from developing and improving the transport provided directly by participating disability service agencies to one that is integrated with the broader community transport system(s). Therefore, over time NorthWestAccess will:

- Build links with a wide range of resources throughout the community
- Develop a strong interface with other providers of transport, both not-for-profit and commercial
- Promote integrated planning within the catchment area between transport providers, service users and all levels of government.

The NorthWestAccess model recognises that transport is not the core business of disability service agencies. Therefore, the various functions involved in the provision of community transport will be outsourced to organisations or providers for which the particular function is core business, or where a level of expertise can be demonstrated.

### A centralised approach

The systems required to operate community transport will be developed and managed at a central point by a Systems Leader, ensuring various components are coordinated. The components might include: coordination of transport routes and schedules; joint purchasing schemes for such things as insurance and fuel; fleet maintenance and management systems; common policies and standards; joint protocols with taxi operators; joint driver training activities; and so forth.

Over time, it is anticipated that NorthWestAccess will integrate with other community transport schemes to form a coordinated North-western Region system.

### **Voluntary participation**

NorthWestAccess is designed in a way that allows an agency to choose at what level and in which transport system components it will participate, based on the benefits to the particular organisation and its client group.

Some agencies might choose to negotiate a handover of all transport activities to a centralised system. Others might choose to continue to operate transport as part of their business while participating in one or more of the centralised components.

### **A phased implementation**

It is proposed to develop NorthWestAccess over three phases:

#### *Phase 1: Intensive systems development*

During this phase the strategy will focus on developing systems that:

- a) Achieve efficiencies for the participating disability service agencies
- b) Address the priority issues
- c) Gain some basic outcome improvements for people with disabilities.

This intensive development phase is expected to last 6-9 months.

#### *Phase 2: Consolidation and refinement*

During this phase the system will be bedded-down and refined. This phase is likely to overlap the previous phase and is expected to last for 12-18 months.

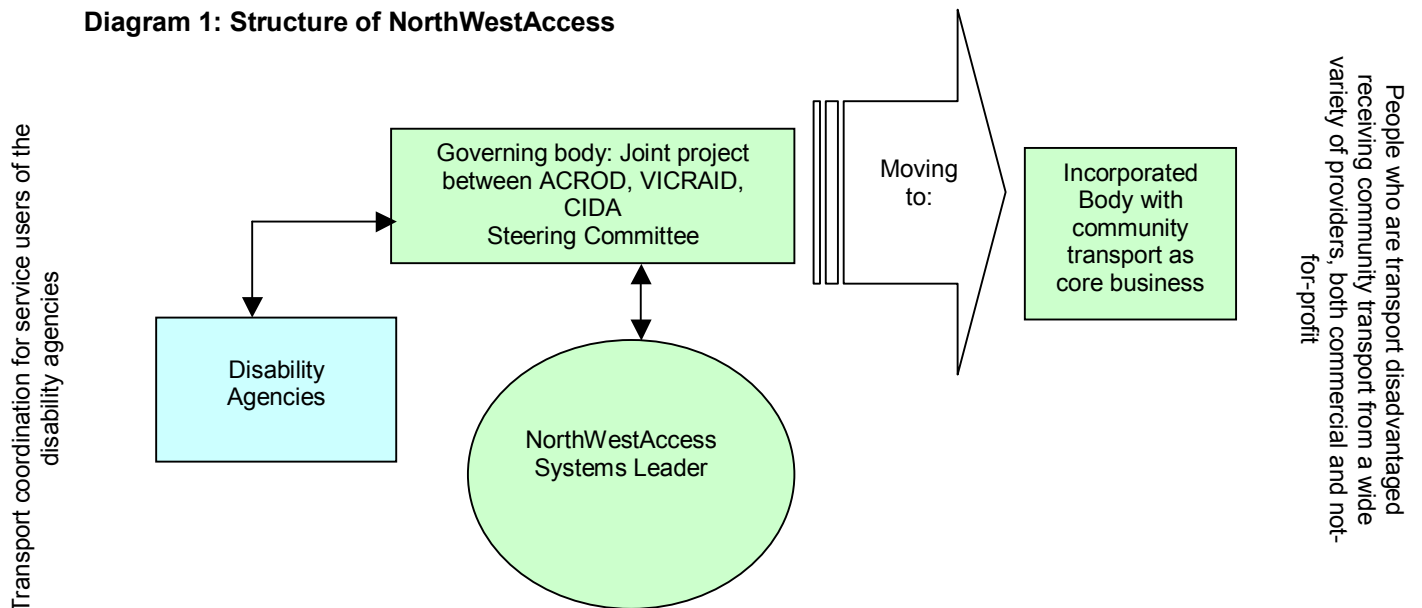
#### *Phase 3: Integration*

This phase will focus on integrating NorthWestAccess into existing broader community transport schemes to help bring about improved access for people with disabilities.

## 5.4. The Structure

The diagram below outlines the structure of NorthWestAccess.

Diagram 1: Structure of NorthWestAccess



### Governance

A two-stage development is proposed for the governance of NorthWestAccess:

#### First stage:

During the first two phases: *Intensive systems development* and *Consolidation and refinement*, it is proposed that NorthWestAccess be governed via a steering committee of the peak bodies: ACROD, VICRAID and CIDA. It is proposed that the steering committee be formed of representatives from the peak bodies, participating agencies, people with specific expertise in community transport, DHS, service users, taxi operators and others with a particular interest, for example, bus service operators.

It is recognised that involvement in the steering committee will incur a cost to the particular individuals and organisations. It is proposed that a budget be set aside to help offset these costs and expenses.

A critical aspect of NorthWestAccess is the intention to establish cooperative arrangements between agencies. This initial governance approach is a means by which all disability service agencies can equally share in the development of NorthWestAccess, as well as set the scene for ongoing collaboration.

#### Second stage:

This stage of governance will occur as part of phase three: *Integration*, which will see the system mature. At this point NorthWestAccess becomes NorthWestAccess Incorporated, or merges with an existing incorporated organisation that has community transport as its core business.

### **NorthWestAccess Systems Leader**

The model assumes that this position will be part time and ongoing, though at a reduced time fraction by the time the model is in its third phase. The Systems Leader will be directly engaged by the governing body. The position will build and maintain the systems rather than manage the particular functions, which will be contracted to providers with specific expertise.

While systems development will be an ongoing role of the position it will be most pronounced in the first phase of the model. In later phases, as the systems are developed, systems management will become the major focus. To reflect this change and the different skills required of each phase, it is proposed that a System Developer be engaged during Phase 1 and a System Manager during Phases 2 and 3. In brief, the Systems Developer would establish or create the NorthWestAccess system, and the Systems Manager would maintain it.

A proposed set of key selection criteria for the Systems Developer is provided in Appendix 3.

#### Key functions of the Systems Leader:

- Enabling appropriate governance
- Facilitating systems for participating agencies
- Gaining efficiencies
- Developing policies, protocols and standards
- Facilitating systems with taxi operators and other providers
- Developing and monitoring centralised transport coordination
- Supporting development of a data management tool – Vehicle Seeker
- Developing a volunteer base
- Developing a regional approach
- Developing after-hours access
- Planning.

These functions and the expected outcomes are outlined below and summarised in a table on page 37.

A diagram outlining the relevant operational relationships is on page 36.

#### Enabling appropriate governance

During phases 1 and 2, the Systems Leader will provide executive support to the steering committee and ensure all necessary Memorandums of Understanding and policies are developed.

The model assumes that, by the conclusion of phase 2, NorthWestAccess will become an independent incorporated body as either NorthWestAccess Inc., or through a merger with an existing incorporated body that has community transport as its core business.

*Key outputs and outcomes for end of phase 1:*

- ✓ *Policies to support governance.*

*Key outputs and outcomes for end of phase 2:*

- ✓ *Establishment of, or merger with, independent incorporated body.*

Facilitating systems for participating agencies

In phases 1 and 2 of NorthWestAccess, the systems will be developed and managed specifically for the participating disability agencies and their clients, hence the Systems Leader will have a direct relationship with the disability service agencies.

Initial liaison with participating agencies will be essential to ensure a common understanding among disability agencies of the model components and principles, and to identify and respond to the particular issues that act as barriers to an agency's participation.

*Key outputs and outcomes of phase 1:*

- ✓ *A critical outcome of the first phase is the negotiation of a Memorandum of Understanding (MOU) with each participating disability service agency, outlining the various roles and responsibilities, expectations, obligations, and so forth.*

Ongoing liaison with agencies by the Systems Leader in the second phase will centre on the specific transport components in which an agency is participating, as outlined in the MOU. Potential specific transport components may include a centralised coordination and scheduling of transport routes, pooling of vehicles, bulk purchase of insurances, a vehicle leasing or purchasing scheme, a vehicle maintenance scheme, fuel cost savings, driver training programs, and so forth.

Gaining efficiencies

It should be possible for agencies, with the support of the Systems Leader, to realise cost efficiencies. Potential efficiencies include: negotiation of consortium contracts for insurance, fleet management schemes and bulk fuel purchases; freeing up staff and/or staffing resources by moving toward partial use of volunteer drivers and/or companions; rationalisation of fleet; freeing up staffing resources currently used to manage and operate transport.

*Key outputs and outcomes of phase 1:*

- ✓ *A key task of the Systems Leader will be to work individually with each agency to undertake a situational analysis that identifies agency-specific issues, current resources, costs, vehicle usage, potential efficiencies and gains, and so forth. The situational analysis will also explore and outline how an agency will actually participate in NorthWestAccess.*
- ✓ *Development of systems and negotiation of efficiencies with, and on behalf of, participating agencies*

Developing policies, protocols and standards

The development and review of common policies, protocols and standards is an important function of the Systems Leader.

*Key outputs and outcomes in phase 1 will include:*

- ✓ *Policies and procedures for the use of agency vehicles.*
- ✓ *A protocol with taxi operators that guarantees work for taxis and in return specifies booking procedures, driver training and allocation, and waiting periods.*
- ✓ *Development of quality standards in relation to driver training and vehicle safety.*

*Additional policies, protocols and standards will be developed during phase 2, as required.*

Facilitating systems with taxi operators and other providers

Many disability service agencies and people with disabilities use taxi services. Taxis, as important complementary providers, are an integral part of any community transport strategy. Agency experience shows that a close working relationship with individual taxi owners/operators leads to better levels of cooperation and improved service.

*Key outputs and outcomes for phase 1:*

- ✓ *Building positive relationships between disability service agencies and taxi operators, the Taxi Association and the Taxi Directorate.*
- ✓ *Development of relevant protocols.*

*Key outputs and outcomes for phase 2:*

- ✓ *Cooperative arrangements will be developed with local government councils, other health and community-oriented organisations, and commercial transport providers. Arrangements might include the sharing of resources, addressing common issues and developing creative local solutions.*

### Developing and monitoring centralised transport coordination

A key component of NorthWestAccess is the coordination of transport routes, schedules and vehicles. It is suggested that initially the coordination should focus on major transport routes, that is, those routes, Monday to Friday, taking clients to and from day activities.

It is proposed that the Transport Coordinator will not be engaged directly by NorthWestAccess, but instead outsourced to an existing transport coordinator. This would:

- Ensure ready experience and expertise
- Enable resource efficiencies because of the existing infrastructure
- Potentially open up a broader range of resources already coordinated by the contracted agency
- Enable the Systems Leader to remain focused on systems development and management, which would be difficult if the position was also directly responsible for managing or operating the coordination of the transport.

It is assumed that transport coordination will be a part-time function, however, if built upon an existing transport coordination service it should be possible for agencies to access support and advice throughout the working week.

This study did not have the scope to identify potential coordination providers, though a few exist within the North-western and neighbouring regions, for example: Eastern Volunteers, Northern Care and Share, WestBay Connect, and Hume Links.

The feasibility of outsourcing to one of these agencies, or another, will be an important task in phase 1.

A critical task for the Systems Leader during the development of centralised coordination would be to help each participating agency explore its options in relation to fleet ownership and management. As previously noted on page 16, an agency has a number of options from which to choose, including:

- An agency could continue to own and manage its own fleet, making vehicles available through protocols to other agencies during non-peak times
- An agency could continue to own its own fleet but outsource the management and coordination
- An agency could sell its fleet to a coordinating entity, negotiating usage for its agency and service users.

*Key outputs and outcomes of phase 1:*

- ✓ *Identification of the coordination needs of participating agencies and their clients, and a framework established.*
- ✓ *Feasibility of outsourcing to an existing transport coordinator.*
- ✓ *Assistance to agencies to explore their options in relation to vehicle ownership and management.*

*Key outputs and outcomes for phase 2:*

- ✓ *A trial coordination of transport routes, schedules and vehicles.*
- ✓ *Negotiation of coordinated driver training.*

Supporting development of a data management tool – Vehicle Seeker

To support the development of the model, an online tool based on an enhanced version of the Vehicle Seeker transport management system is proposed. Refer to page 11 for further information on Vehicle Seeker. The use of Vehicle Seeker is recommended for two main reasons:

- a) Its current and intended use by other providers in neighbouring local government areas gives rise to the potential for future integration of systems. This would help promote a common approach throughout the North-western Region
- b) It enables people with disabilities and their families and carers to directly access some vehicles after-hours for their own use. For further details refer to 'development of after-hours access' on page 35.

In conjunction with disability service agencies, the Systems Leader will develop the specifications for the NorthWestAccess version of Vehicle Seeker. Basic requirements of the data management tool will include:

- The vehicle booking database, as seen in the current version of Vehicle Seeker
- A volunteer database
- Capacity to schedule major routes
- Capacity for fleet management by a transport coordinator.

The development of the online tool will be the responsibility of Infoxchange through the appointment of a project officer to develop, manage and maintain the system. This project officer would also have a role in promotion of Vehicle Seeker, as well as in education and training for staff of participating agencies.

The Systems Leader will liaise with Infoxchange to ensure Vehicle Seeker meets the needs of NorthWestAccess.

To reduce costs and encourage integration, it is proposed that NorthWestAccess build upon the systems development that has occurred through the Westbay Connect project, which covers the local government areas of Wyndham, Hobson's Bay and Maribyrnong.

*Key outputs and outcomes of phase 1:*

- ✓ *Agencies ready to register their vehicles with Vehicle Seeker.*
- ✓ *Identification of the Vehicle Seeker specifications for NorthWestAccess to enable development of the West Access system in phase 2.*

Developing a volunteer base

The literature and examples of other models show that community transport often involves the use of volunteers, either as drivers or as support companions. The Systems Leader will help develop a volunteer base by linking with existing volunteer networks. Key aspects will be to identify, with disability service agencies, how and when volunteers might be used, and the standards that will guide their involvement and training requirements.

*Key outputs and outcomes of phase 1:*

- ✓ *A volunteer framework that includes a policy, standards, training requirements, identified sources of volunteers, a nominated lead agency and in-principle agreement by agencies to support the development of a volunteer base in phase 2.*

*Key outputs and outcomes of phase 2:*

- ✓ *Volunteers recruited and trained.*

Developing a regional approach

The Systems Leader will be responsible for developing collaborative arrangements with other community transport systems in the region, for example, Westbay Connect, Hume Links, and Northern Care and Share.

It is proposed that, as the system matures, a single, integrated system for the north-western suburbs should be explored and promoted. The use of a common technology (Vehicle Seeker), similar underlying philosophies and common community interests should aid this.

Some of the differences between the various systems, for example, different funding sources could provide opportunities for developing a broader region-wide system for all people who are transport disadvantaged.

Likewise, the local nature of each community transport service, if incorporated in any future integrated system, could help ensure that any region-wide approach remains focused on local needs and solutions.

*Key outputs and outcomes for phase 1:*

- ✓ *Building of relationships with other community transport systems in the northwestern suburbs.*
- ✓ *Identification, with the other systems, where joint approaches can occur.*

Developing after-hours access

An important longer-term aim of the model is to improve access to transport for all people with disabilities living in the catchment area.

The use of Vehicle Seeker would enable people with disabilities and their families and carers to directly access some vehicles after-hours for their own use.

For those with on-line access this could be done direct. For those without, it is proposed to establish an 1800 telephone service to operate after-hours and on weekends. The telephone call would link the person to a call centre with on-line access to Vehicle Seeker and capacity to complete the person's request.

This aspect of the model could be developed as part of the centralised coordination or alternatively, with an organisation that already provides an after-hours telephone booking service, such as WiN Support Services.

*Key outputs and outcomes of phase 1:*

- ✓ *Framework for introduction of after-hours access in phase 2.*

Planning

The Systems Leader will facilitate a collaborative planning approach between disability services agencies as well as with other community transport providers, commercial operators, all levels of government; and service users.

To assist the planning function, the Systems Leader will be responsible for ensuring there is ongoing research of good practice, new technologies and needs, as well as ongoing evaluation and refinement of NorthWestAccess.

*Key outputs and outcomes of phase 1:*

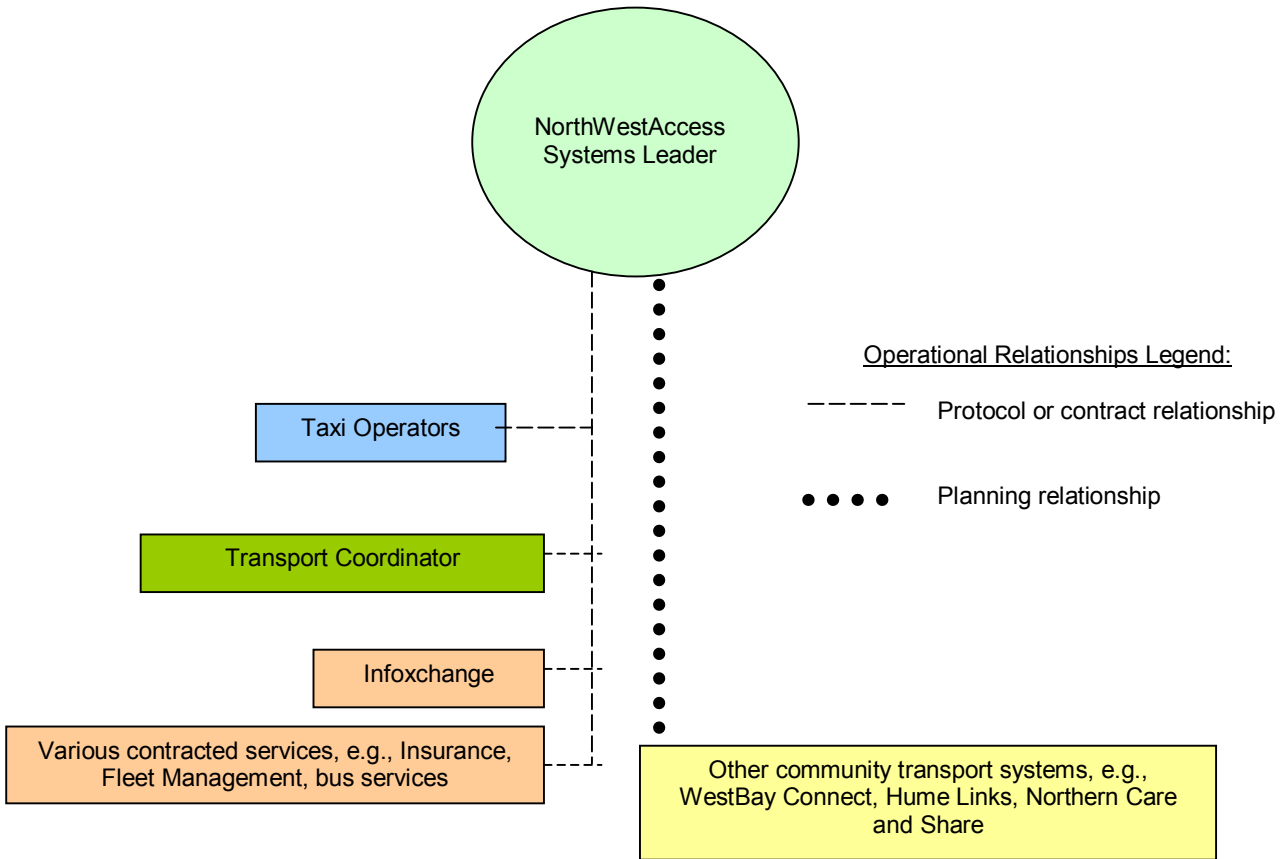
- ✓ *Disability agencies participate in planning and development*

*Key outputs and outcomes of phase 2:*

- ✓ *Planning occurs more broadly across the region and with various jurisdictions.*

The **operational relationships** of NorthWestAccess are summarised in the following diagram.

**Diagram 2: The operational relationships of NorthWestAccess**



**Table 2: NorthWestAccess – A Phased Implementation in Summary – phases 1 and 2**

	<b>Phase One: Intensive Systems Development</b>	<b>Phase Two: Consolidation and Refinement</b>
<b>Timeframe</b>	6 – 9 months	12 – 18 months
<b>Governance</b>	Joint project of the peak bodies – ACROD, VICRAID and CIDA, with a Steering Committee	
<b>Focus of Systems Leader</b>	<ul style="list-style-type: none"> <li>• Executive support of Steering Committee</li> <li>• Marketing of NorthWestAccess to agencies</li> <li>• Identifying and addressing particular efficiency-related issues faced by agencies</li> <li>• Policy, protocol and standards development</li> <li>• Liaison with relevant community and commercial transport services</li> <li>• Identification of coordination opportunities between agencies</li> <li>• Building a regional approach</li> <li>• Establishment of Vehicle Seeker as coordination tool</li> <li>• Developing a volunteer base</li> </ul>	<ul style="list-style-type: none"> <li>• Executive support of Steering Committee</li> <li>• Establish long-term governance</li> <li>• Building cooperative arrangements with other providers: coordination of routes, vehicle sharing, driver training</li> <li>• Further development of Vehicle Seeker as required</li> <li>• Training of NorthWestAccess agencies in use of Vehicle Seeker</li> <li>▪ Implementation of volunteer framework</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Governance policies developed</li> <li>• Memorandums Of Understanding with NorthWestAccess agencies</li> <li>• Situational analysis for each agency</li> <li>• Cost efficiencies in place for agencies</li> <li>• Policy and standards framework developed</li> <li>• Formal protocol with taxi services</li> <li>• Coordination framework established</li> <li>• Feasibility of outsourcing coordination determined</li> <li>• Fleet ownership and management options explored</li> <li>• Agencies registered on Vehicle Seeker</li> <li>• Vehicle Seeker specifications developed</li> <li>• Volunteer framework developed</li> <li>• After-hours access framework developed</li> </ul>	<ul style="list-style-type: none"> <li>• Establishment of, or merger with, independent incorporated body</li> <li>• Coordination of driver training</li> <li>• Trial coordination of transport routes, schedules and vehicles via a contracted provider</li> <li>• Use of Vehicle Seeker as the central data management tool for NorthWestAccess</li> <li>• Volunteers recruited and trained</li> <li>• After-hours access for clients available</li> <li>• Cooperative regional arrangements with other community transport systems</li> </ul>

## 5.5. Implementation

### Phase 1

<i>Major focus</i>	<i>Resources and Cost</i>
<u>Steering committee</u>	
<ul style="list-style-type: none"> <li>Establish terms of reference</li> <li>Engage Systems Leader</li> <li>Negotiate workplan with Systems Leader</li> <li>Monitor ongoing progress of project via regular meetings</li> </ul>	<p>Executive support for steering committee by the lead peak body: \$4,500</p> <p>Reimbursement for steering committee members<sup>2</sup>: \$25 per hour up to max. \$150 <i>plus</i> Travel: 0-25 kms, \$5; 20-50 kms, \$30; 50+ kms, \$50</p>
<u>Systems Leader</u>	
<ul style="list-style-type: none"> <li>Develop work plan</li> <li>Promote the proposed model</li> <li>Build relationships with key stakeholders</li> <li>Negotiate MOUs with disability service agencies</li> <li>Undertake transport situational analysis with each agency, identifying issues, efficiency gains, coordination needs, etc.</li> <li>Explore and negotiate contracts re insurance, fleet, etc.</li> <li>Rationalise fleet</li> <li>With agencies, develop specifications for Vehicle Seeker</li> <li>Liaise with Infoxchange re development of Vehicle Seeker</li> <li>Conduct feasibility to outsource coordination</li> <li>Develop transport coordination specifications and negotiate contract with provider</li> <li>Develop protocols</li> <li>Liaise with taxi operators, DOI, etc.</li> <li>With agencies, establish standards</li> </ul>	<p>0.6 for 9 months, based on project manager level of \$60,000 per annum, pro rata plus associated salary on-costs, administration, travel and meeting allowance: \$41,250</p>

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<sup>2</sup> Reimbursement based on level recommended in Upper Hume PCP Community Participation strategy

<b><i>Major focus</i></b>	<b><i>Resources and Cost</i></b>
<u>Vehicle Seeker: managed and operated by Infoxchange</u>	
<ul style="list-style-type: none"><li>• Infoxchange checks and updates agency details on Service Seeker community services directory, and establishes users and their level of access on the system</li></ul>	Approximately 1.5 hours per agency: Around \$90 per agency <sup>3</sup>
<ul style="list-style-type: none"><li>• Training: probably a bi-monthly regular training session in the searching and administration of Vehicle Seeker system</li></ul>	Session 2.5 hours, with minimum of 6 participants: \$82.50 per person
<u>Fleet management</u>	
<ul style="list-style-type: none"><li>• To be determined, following situational analyses undertaken by Systems Leader</li></ul>	To be determined.

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<sup>3</sup> All Vehicle Seeker costs are estimates only. Infoxchange provided these estimates on 18 December 2003. Actual costs will be provided by Infoxchange once specifications are provided

**Phase 2**

Major focus	Resources and Cost
<u>Steering committee</u>	
<ul style="list-style-type: none"> <li>Negotiate workplan with project worker</li> <li>Monitor ongoing progress of project via regular meetings</li> </ul>	<p>Executive support for steering committee by the lead peak body: \$3,000</p> <p>Reimbursement for steering committee members<sup>4</sup>: As per Phase 1</p>
<u>Systems Leader</u>	
<ul style="list-style-type: none"> <li>Develop work plan</li> <li>Continue to promote the model</li> <li>Build and maintain relationships with key stakeholders</li> <li>Monitor MOUs and contracts</li> <li>Liaise with Infoxchange re implementation of Vehicle Seeker</li> <li>Monitor transport coordination contract</li> <li>Develop and monitor protocols</li> <li>Ongoing liaison with taxi operators, DOI, etc.</li> <li>Develop after-hours access</li> <li>Develop regional approach with other community transport services</li> <li>Undertake ongoing planning</li> <li>Develop volunteer base</li> <li>Establish independent incorporated body</li> </ul>	<p>0.4 for 12 months, based on \$50,000 per annum, pro rata plus costs, administration, travel and meeting allowance: \$30,000</p>

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<sup>4</sup> Reimbursement based on level recommended in Upper Hume PCP Community Participation strategy

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Major focus	Resources and Cost
<u>Vehicle Seeker: managed and operated by Infoxchange</u>	
<ul style="list-style-type: none"> <li>• Develop additional aspects of the system: driver and volunteer database. WestBay Connect and Northern Region Vehicle Seeker interested in this module therefore potential to share cost. Dependent on detail and level required; development could take up to 6 weeks.</li> </ul>	\$20,000, with potential to share this cost
<ul style="list-style-type: none"> <li>• Develop additional aspects of the system: scheduling routes</li> </ul>	Dependent on detail, perhaps less than driver and volunteer database
<ul style="list-style-type: none"> <li>• Ongoing hosting and maintenance. Could be customised for NorthWestAccess</li> </ul>	Approximately \$1,800 per LGA annually
<ul style="list-style-type: none"> <li>• Provision of technical and user support that includes:               <ul style="list-style-type: none"> <li>– On-site user training</li> <li>– Assistance with establishing new users and user management</li> <li>– Email and phone helpdesk queries</li> <li>– Confirm IT capacity of agencies (web browsers, Internet connections)</li> <li>– Check Infoxchange Service Seeker entries</li> <li>– Inform users of enhancements, trends</li> <li>– Electronic promotion of system through this and other networks in Northwestern Region</li> <li>– Assistance with development of protocols and procedures</li> </ul> </li> </ul>	1.5 days per fortnight: \$8,000 - \$10,000 per annum
<u>Transport coordinator: managed by contracted agency, to be determined</u>	
<ul style="list-style-type: none"> <li>• Operate transport coordination for participating agencies, according to specifications</li> </ul>	Fraction of worker to be determined after Systems Leader has developed specifications and the number of agencies that choose to centralise coordination. Assume approximately \$40,000 per year pro rata, plus on-costs.
<ul style="list-style-type: none"> <li>• Liaise with and report as per contract to Systems Leader of NorthWestAccess</li> </ul>	
<ul style="list-style-type: none"> <li>• Liaise with participating agencies</li> </ul>	
<ul style="list-style-type: none"> <li>• Liaise with Infoxchange re Vehicle Seeker</li> </ul>	It is assumed that costs could be reduced if service provided by an existing transport coordinator because not duplicating infrastructure, and other potential efficiencies of scale.
<ul style="list-style-type: none"> <li>• Ensure drivers are trained and supported according to agreed standards and protocols</li> </ul>	
<ul style="list-style-type: none"> <li>• May or may manage the fleet: refer below</li> </ul>	

Major focus	Resources and Cost
<u>After-hours access</u>	
<ul style="list-style-type: none"><li>• Explore existing telephone support services that may potentially be extended to provide this service</li><li>• Develop 1800 telephone service</li><li>• Negotiate and monitor contract with provider</li></ul>	Call centre services: To be determined
<u>Fleet management</u>	
<ul style="list-style-type: none"><li>• To be determined, following situational analyses undertaken by Systems Leader</li></ul>	To be determined. It is assumed some input from agencies' current transport budgets, service user levies, some efficiencies via bulk fuel purchases etc.

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### Phase 3

Identification of the specific costs for implementing the model in the third phase will be determined during the project phases of the implementation. Much will depend upon:

- The analysis of each agency's specific situation as to what capacity there is in the system to self-fund some of the ongoing operation
- The service user fee that is agreed upon
- The specifications of the system
- The degree to which the system can be integrated with other community transport services
- Potential funding sources.

## Appendix 1 - Reference Group

John	Airey	Carinya Society
Brenda	Boland	DHS Disability Services Branch
Patrice	Evans	DHS Western Metropolitan Region
Estelle	Fyffe	WiN Support Services
Warren	Jenkins	E.W. Tipping Foundation
John	Morkham	ACROD Victoria

## Appendix 2 – Project Participants

- Aon Risk Services
- Australasian Asset Group
- Brimbank City Council
- Carinya Society
- Colac-Otway Community Transport Service
- DAS Fleet
- Department of Human Services, Service Access, Disability Services Branch
- Department of Human Services, Western Metropolitan Region
- Department of Infrastructure
- Distinctive Options
- E.W. Tipping Foundation
- Hobson's Bay City Council
- Interchange (West)
- La Trobe Coordinated Community Transport (LCCT)
- March Pty. Ltd.
- Maribyrnong City Council
- Melton Bus and Coach Lines
- MS Society
- Northern Care and Share
- Scope Victoria
- Select Fleet Management
- St John of God Services
- Victorian Taxi Association
- Victorian Taxi Directorate
- Westbay Connect
- Western Region Disability Network
- WiN Support Services
- Wyndham City Council
- Yooralla Society

## Appendix 3 – Selection criteria: Systems Developer

The key to this role is to identify discrete functions of NorthWestAccess and to outsource these to specialist service providers. The Systems Developer must therefore maintain a clear focus on addressing issues identified among the participating agencies, and not taking on a direct service provision role.

### Selection Criteria:

- Experience in a project management/worker role in community transport or related industry
- Knowledge of transport issues relevant to people with a disability
- Capacity to be proactive, independent and self-motivated
- Excellent written and verbal communication skills
- Understanding of commercial aspects of operating transport services for not-for-profit agencies
- Experience in liaison across government-funded, government and commercial organisations

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- <sup>5</sup> Neverauskas, D. and Mollison, W. 1997.
- <sup>6</sup> Hibbert, P. 1997.
- <sup>7</sup> Budge, T. et al, 1998.
- <sup>8</sup> Lehmann, J. et al. 1998.
- <sup>9</sup> Ferrier, H. 1998.
- <sup>10</sup> Taylor, J. and Lavery, I. 1998.
- <sup>11</sup> Hind, J. and Hind, J. 1998.
- <sup>12</sup> Hind, J. et al., 2000.
- <sup>13</sup> Cousland, H. 2000.
- <sup>14</sup> Woodland, J. et al. 2000.
- <sup>15</sup> Franzmann, L. 2003.
- <sup>16</sup> Savige, D. 2003.
- <sup>17</sup> Summarised from Watters, S. 2003.