



**5 YEAR
BUSINESS PLAN
2003 - 2008**

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Executive Summary

Gloucester City Dial-a-Ride (GCDAR), a door-to-door transport provider for disabled, elderly and frail residents of Gloucester, has set itself new and challenging aims for the future –

- To increase the number and diversity of its active membership
- To become more sustainable and grow to meet actual need
- To improve its efficiency in delivery, staff development and user involvement

The following business plan creates the platform from which these aims can be achieved.

GCDAR has developed successfully over the last 17 years but has reached a stage in its business where a strategic and focussed approach would secure greater benefits for the organisation.

This plan highlights a number of initiatives that should be undertaken to stimulate passenger demand, create sustainability and improve efficiency –

- 1. Consultation and analysis of unmet demand, including that from underrepresented groups**
- 2. Diversification of the service operation**
- 3. Participative role in the Gloucestershire Minibus Scheme**
- 4. Development of a sustainable fundraising strategy**
- 5. Skills development for all existing and new members of the organisation**
- 6. Take advantage of technological advances for service delivery, promotion and development**
- 7. Partnership development**

To facilitate the attainment of the organisation's aims individual action plans have been created. The starting point is to secure the backing and commitment of all current members of GCDAR.

Transport initiatives keep evolving in a bid to improve accessibility for all. GCDAR will remain at the forefront of community transport in Gloucester by engaging in further expansion.

Gloucester City Dial-a-Ride could be the Gloucester Community Transport of the future.

Section 1 - Introduction

The purpose of this business plan is to provide a framework and focus, which will enable Gloucester City Dial-a-Ride, a provider of door-to-door community transport, to manage their targets and objectives over the next 3 to 5 years.

Gloucester City Dial-a-Ride, as will be demonstrated in Section 2, provides a lifeline to many disabled and elderly city residents. The mission of the organisation is –

To meet social deprivation within our community, by providing a high quality minibus service for the frail, elderly and disabled people of Gloucester City.

Underpinning this mission are the following core values –

- Seek to employ best practice
- Pursue an equal opportunities programme
- Value our staff and invest in continual professional development
- Demonstrate excellence in all that we do
- Operate in an open and accountable way
- Ensure that the resources available are used in a cost effective way

For any organisation's goals to be achieved there needs to be clearly defined business, development and action plans. The management committee, in conjunction with their main funders, Gloucester County and Gloucester City Councils, realised the need for such strategic analysis and this led to applying for and obtaining funding from the Community Fund.

This funding enabled the engagement of a Development Worker to facilitate this work and this document forms part of the work being undertaken. The anticipated benefits from the implementation of this business planning are that –

- All sectors of the community who could benefit from the service will be able to do so
- The service will become sustainable and grow to meet actual need
- The service will become more efficient in delivery, staff development and user involvement

Wide consultation is running concurrently with the development of this business plan and it should be recognised that this is simply a starting point, which will continue to evolve. During the implementation phases, regular monitoring and evaluation must occur to assess the effectiveness and practicalities of the plan. Amendments and developments to the plan are therefore anticipated.

Section 2 - Organisational analysis

History

The Gloucester City Dial-a-Ride, door to door transport scheme was set up in March 1986, following an initial analysis report of community transport needs of city residents. It began with one minibus and one part time worker. The organisation has grown significantly and now has five buses, ten paid staff and two volunteers.

GCDAR provides door-to-door minibus transport services for frail, elderly and disabled people living within Gloucester City, who are unable to use mainstream public transport and do not have access to a motor vehicle.

Service provision

The organisation has registered over 2000 residents since 1986 and has an average, annual active membership of between 500-600 passengers. For these passengers GCDAR completes in excess of 25000 trips a year between the hours of 9am -5pm, Monday to Friday. The service enables people to 'get out and about' and access many activities, with shopping and social currently leading the way.

The main funders are Gloucestershire County Council and Gloucester City Council.

An analysis of the membership and its activities for 2002/03 helps quantify and qualify to what extent GCDAR currently meets its stated mission –

To meet social deprivation within our community, by providing a high quality minibus service for the frail, elderly and disabled people of Gloucester City.

Age

	Gloucester City Dial-a-Ride	Gloucester¹
60 and over	92%	20%
75 and over	72%	7%

Gender

	Gloucester City Dial-a-Ride		Gloucester^{1/2}	
Age	Male	Female	Male	Female
All	19%	81%	49%	51%
60 and over			44%	56%
75 and over			38%	62%

Ethnicity

	Gloucester City Dial-a-Ride	Gloucester ^{1/2}		
	All	All	60 and over	75 and over
White	92%	93%	95%	97%
Asian	1%	3%	1%	1%
Black	3%	2%	3%	1%
Chinese	4%	0%	0%	0%
Other	-	2%	0%	0%

The general Gloucester ethnicity statistics do not reflect the profile in certain areas of the City, for example, in the Barton and Tredworth ward the ethnic mix is –

	60 and over ^{1/2}	75 and over ^{1/2}
White	72%	85%
Asian	11%	5%
Black	15%	8%
Chinese	1%	1%
Other	1%	2%

NOTE

¹ Source is 2001 Census records from the Office of National Statistics.

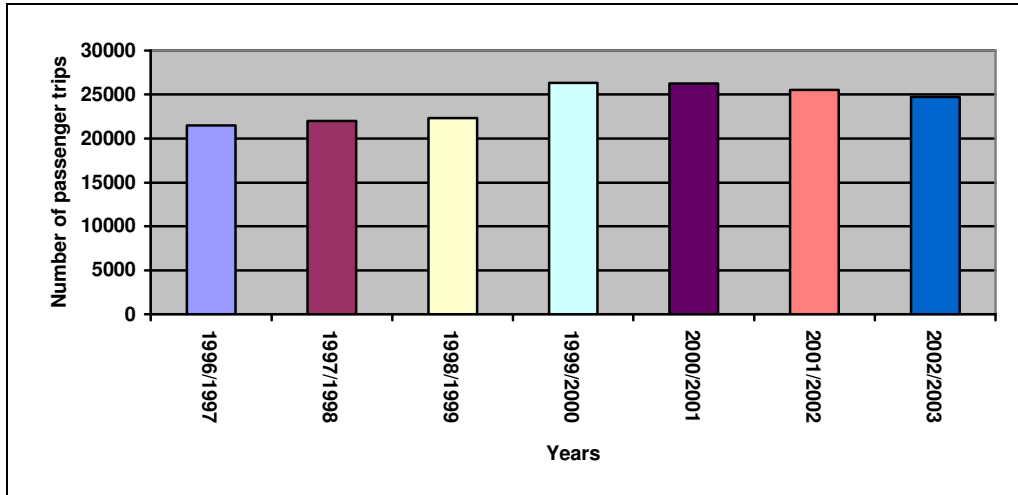
² As the majority of current Gloucester City Dial-a-Ride passengers are aged 60 and over, it has not been felt necessary to breakdown the membership to the same level as has been done for the total Gloucester population.

Disability analysis

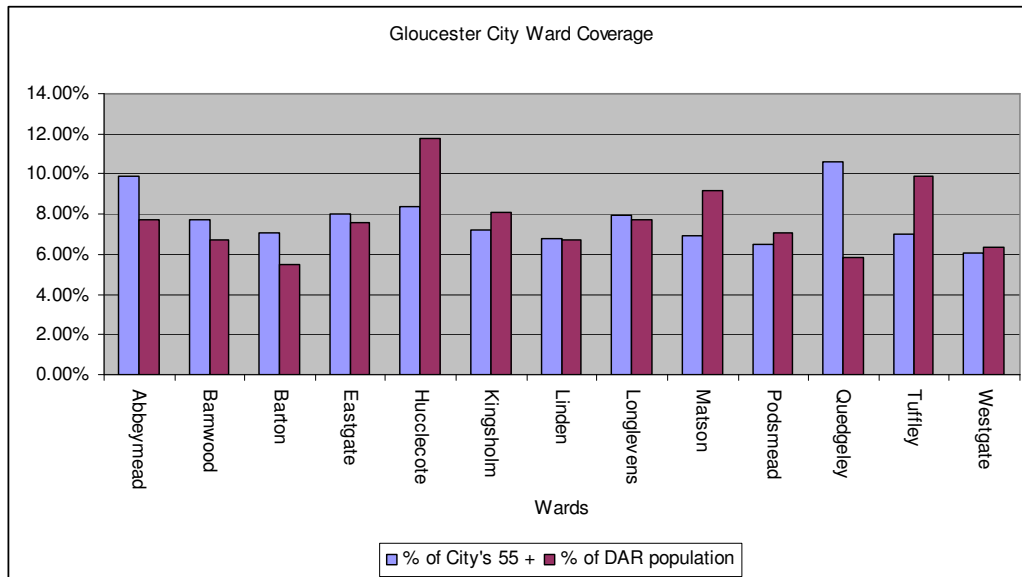
Disability description	Percentage of GCDAR population
Arthritis	18%
Asthma	4%
Frailty	25%
Heart condition	5%
Learning difficulties	2%
Multiple sclerosis	2%
Sensory impairment	9%
Walking difficulties	37%

Of 550 active members, 150 are wheelchair users.

Passenger Trips completed by GCDAR



Coverage of Gloucester City by GCDAR



Most Popular Activities (2002/03 users)

TRIP TYPES	PERCENTAGE
SHOPPING	44.63%
SOCIAL	30.50%
PERSONAL BUSINESS	6.81%
VISITING	5.09%
DAY CENTRE	4.12%
HEADWAY	2.75%
HOSPITAL APPOINTMENT	2.06%

Customer feedback

The organisation, support staff and drivers receive many compliments from their passengers, be it in person, writing or by the telephone. To provide further indicators a passenger survey was conducted in 2001, which produced a very positive response and highlighted the following as key benefits of the service –

- Independence and freedom
- Access to services, activities and friends
- An affordable, friendly and essential transport alternative

The future?

With the successful history of GCDAR what does this mean for the future and how well positioned is the organisation to meet its stated aims and objectives in the next few years?

This organisational analysis, in conjunction with other findings, provides indicators on the strengths and weaknesses of GCDAR, as well as potential opportunities and threats which can be summarised as –

Strengths

- Commitment and enthusiasm of all staff
- Customer focussed
- Reliable
- Providing an effective service to users
- Friendly and supportive
- Experienced and knowledgeable

Weaknesses

- Limited planning – strategic and operational
- Insufficient resources
- Volunteer support
- Publicity and promotion
- Time management
- Number of committee members
- Management committee support of staff

Opportunities

- Creating a long term development post
- Expansion of the service to truly meet the needs of the community, while simultaneously increasing revenue and sustainability
- Raise the GCDAR profile and change image and services
- Develop partnerships and relationships with other groups and organisations
- Benefit from minibus brokerage scheme in terms of both sustainability and service capacity
- Build capacity and efficiency through the use of technology, without losing its existing key 'friendly' quality

Threats

- Loss of key staff
- Removal / reduction of funding from main funders
- Reorganisation / change in county council's strategy for community transport
- Public transport developments
- Competition from neighbourhood projects / partnerships, community groups and private transport operators
- Complacency

Section 3 - Strategic analysis

GCDAR has recognised the need to develop plans for the future and this strategic analysis seeks to identify what the organisation wants to achieve and how it could do so. This section therefore addresses the Strategic Aims in detail and considers other areas underpinning these aims –

- Consultation and analysis
- Marketing
- Contingency planning

1. Strategic Aims

GCDAR exists to provide effective transport services for its members and potential members. To achieve this, the following aims have been identified –

- **To increase the number and diversity of its active membership**
- **To become more sustainable and grow to meet actual need**
- **To improve its efficiency in delivery, staff development and user involvement**

For these aims to be achieved certain objectives and goals need to be set. The following objectives underpin the above aims and both existing and future work can be measured against them.

To increase the number and diversity of its active membership -

- Develop and provide effective consultation mechanisms
- Develop contacts and networks with all sectors of the community, including black and minority ethnic groups and younger disabled
- Investigate and overcome the barriers that prevent service use
- Develop promotion and publicity plans
- Maintain and promote the unique ‘friendly’ bus service approach

To become more sustainable and grow to meet actual need -

- Develop a strategic service plan from the consultation project
- Engage with existing and new funders to create long term partnerships
- Take advantage of technological developments to increase returns and reduce costs
- Develop links with community transport groups in Gloucestershire and take an active part in brokerage schemes
- Develop and implement new services
- Develop a structured fundraising strategy
- Development Worker’s role becomes a core, long term position

To improve its efficiency in delivery, staff development and user involvement -

- Review its operational activities and how they impact on passengers, drivers and support staff
- Harness the potential of technology in service delivery and staff development
- Develop structured training and development opportunities for all involved in the operation of the organisation
- Develop and provide effective consultation mechanisms
- Consider adopting a Quality Assurance system

Detailed action plans will be developed and form part of this business plan to enable these aims and objectives to be managed and evaluated. One of the first stages will be to understand the existing market through consultation and analysis.

2. Consultation and analysis

For GCDAR to achieve its aims and objectives a significant amount of activity needs to take place in order to assess the potential for development. The consultation process should involve the following groups –

- GCDAR
- Passengers
- Potential passengers
- Local councils and neighbourhood schemes
- Health organisations, voluntary and community groups
- Local and national community transport organisations
- Transport organisations (including statutory bodies)

Consultation is a key driver to the success of this development work. Section 4 contains a detailed action plan.

3. Marketing

During the analysis of the needs and wants of Gloucester City residents a variety of client groups may be identified and this is likely to demonstrate the need for different services for different markets. For example, Dial-a-Ride's current image is very much of a service that is limited to the elderly population.

The organisation will therefore need to review the methods of publicising and marketing itself. To date any promotion has been on an ad hoc or reactive basis. The existing method has been predominantly by leaflet distribution. There are no records to determine how successful this has been compared with other methods, eg word of mouth or newspaper advertising, but research conducted by Gloucester City Council, for their Residents' survey in 1999, suggests that other methods can be more successful –

How do you obtain information about services?

Local newspapers (eg Citizen)	- 63%
Council newspaper	- 50%
Information/leaflets to home	- 45%
Local TV	- 25%
Talks to friends / relatives	- 23%
Radio	- 22%
Information/leaflets shops, etc	- 16%
Information/leaflets in public buildings	- 16%

It is crucial that GCDAR communicates their message, as according to a number of Neighbourhood Project surveys in 2000 the awareness and availability of transport are common concerns of Gloucester City residents.

This is backed up by similar surveys conducted by both the Department of Transport and Disabled Persons Transport Advisory Committee.

The latter commissioned a survey in 2002 – ‘Attitudes of Disabled People to Community Transport’ – and the two key findings were –

- Need to increase awareness of community transport schemes
- Need to increase the availability of community transport schemes

More than 20% of those surveyed have never heard of Dial-a-Ride and awareness is particularly low among wheelchair users.

This is a clear indicator that marketing is a key issue to any future development.

GCDAR could publicise its service in a number of ways. For example –

- Local newspaper
- Local radio
- Internet
- Talks and presentations
- Posters and leaflets
- Events
- Community and voluntary groups newsletters

The findings of the Gloucester City Council Residents Survey of 1999 will help determine the most cost effective methods. In addition the target audience will indicate certain methods are more appropriate than others and this feedback is being sought in the February 2004 survey.

To take this activity forward a separate, detailed Marketing Action Plan is being developed.

4. Contingency planning

GCDAR needs to be aware of the potential outcomes from any new activity. For example –

How to cope with excessive demand created from consultation process and publicity campaign, where there is insufficient resource?

Methods could include –

- Improving skill set of existing staff now
- Securing the support of volunteers
- Obtaining access to additional minibuses
- Additional hours worked by existing staff

How to cope with insufficient demand created from consultation process and publicity campaign, where there is excessive resource?

Methods could include –

- Creating revenue by lending buses
- Acting as a broker in the minibus brokerage scheme
- Recruiting volunteers rather than additional employees
- Use different methods of publicity

How to cope with key staff leaving at an important phase of the implementation stage?

Methods could include –

- Improving skill set of all existing staff now
- Develop closer links with other local community transport organisations
- Develop staff satisfaction surveys
- Develop structured training and development plans for staff

Section 4 - Action plans

To enable the aims and objectives to be progressed within agreed timescales, action plans need to be in place and regularly reviewed.

Action plans that have been developed to date are –

- Consultation plan
- Marketing plan
- Fundraising plan
- Operational plan
- Volunteer plan

Further plans and/or developments to the following plans will be made as appropriate.

1. Consultation plan

This will comprise three distinct phases –

- Phase 1 - utilising existing information
- Phase 2 - future consultation and research
- Phase 3 – summary and recommendations

Phase 1

Sources	Information available	Activity & Output	Target date	Owner	Status
Gloucester City Dial-a-Ride	Organisation feedback (wish list) 2001 survey SNT records Previous work with ethnic minority groups / individuals Capacity report	Review and summary of key points	31/3/04	MD	
Other Dial-a-Rides	Websites, meetings and phone conversations	Review and summary of key points	31/8/03	MD	Done
Gloucester City Council	Residents survey Community Development and Strategy teams	Review and summary of key points	31/3/04	MD	
Neighbourhood projects / schemes	Residents surveys Community group consultations	Review and summary of key points	14/9/03	MD	Done
Gloucestershire County Council	Best value review Transport surveys MAiDen database	Review and summary of key points	30/9/03	MD	Done
Transport organisations	Department for transport consultations Community Transport Association reports	Review and summary of key points	12/10/03	MD	Done
Mobility agencies	Disabled Persons Transport Advisory Committee consultations Age Concern reports Help the Aged reports	Review and summary of key points	12/10/03	MD	Done

Phase 2

Sources	Consultation / research opportunities	Activity & Output	Target date	Owner	Status
Gloucester City Dial-a-Ride	Survey existing and previous regular users	Draft and distribute a survey to passengers.	29/2/04	MD	Done
		Identify previous regular users and seek to understand from the survey why they no longer use the service	29/2/04		Done
		Review results	30/4/04		
Neighbourhood projects and schemes	Meet with coordinators to understand needs of residents. Promotion of Gloucester City Dial-a-Ride by newsletters, leaflets and talks (as appropriate)	Contact and meet relevant individuals. Consult on GCDAR – perception; awareness and barriers.	31/12/03	MD	Done
		Draft article and promotional material.	31/12/03		Done
		Develop Marketing Action Plan.	29/2/04		Done
		Review and evaluate plan.	30/9/04 and 31/3/05		
Health organisations, voluntary and community groups	Meet with groups to identify needs of members. Promotion of Gloucester City Dial-a-Ride by newsletters, leaflets and talks (as appropriate)	As for above	As for above	MD	In progress
National City Dial-a-Rides	Analyse previous consultation completed by them. Review their membership records in terms of equal opportunities and usage	Identify organisations to approach. Draft and distribute written communication.	29/2/04	MD	Done
		Review and summarise feedback	30/4/04		
Local or national agencies	Obtain details of future research being conducted	Search internet and publications. Review and summarise relevant information	30/6/04 and 31/12/04	MD	

Phase 3

Activity and output	Target date	Owner	Status
Draft report from review of phases 1 and 2 of the consultation plan	31/12/04	MD	

Consultation issues to be resolved

Issue	Action	Target	Owner	Status
Consulted group expectations	Discuss impact on resources (staff and drivers)	31/10/03	GCDAR	Done
Funding	Apply to organisations to meet consultation costs (where appropriate)	14/11/03	MD	Done - £5000 funding received, balance being sought.
Membership records	Clean up address records	31/3/05	Support staff / SNT	In progress
Language and other barriers for groups to be consulted	Assess and review on meeting / contacting groups.	30/6/04	MD	In progress - actions part of Marketing Action Plan.

2. Marketing plan

Activity and output	Target date	Owner	Status
<p>Passenger newsletter to be written and distributed</p> <p>To be completed on an ongoing quarterly basis</p>	31/12/03	MD / JD / Support staff	<p>Completed 19/12/03</p> <p>Easter edition in progress – £750 funding received from Barnwood House Trust, further sources being approached and BSOG money to be made available.</p>
<p>Detailed Marketing Action Plan to be drafted.</p> <p>Plan to be agreed and implemented</p>	<p>29/2/04</p> <p>31/3/04</p>	<p>MD</p> <p>MD and Management Committee</p>	<p>Done</p> <p>In progress</p>
<p>Countywide Community Transport sub group to be formed to take marketing forward on a wider scale.</p>	18/11/03	MD	<p>Group formed and plan being developed as part of Community Transport Gloucestershire's remit</p>

3. Fundraising plan

Activity and output	Target date	Owner	Status
Produce a 'development wish list'	31/8/03	MD / GCDAR	Done
Identify fundraising coordinator on management committee	30/6/04	DH	
Develop a 3-5 year fundraising strategy (including consideration for fundraiser and fundraising committee)	30/9/04	Management Committee	
Prioritise items that need funding (in conjunction with above)	30/9/04	Management Committee	
Engage with fundraising advisers	From 30/9/04	MD / Fundraiser	
Approach funders	From 30/9/04	MD / Fundraiser	

4. Operational plan

Activity and output	Target date	Owner	Status
Review current service and consider future opportunities / developments, eg 1) Extending operational hours 2) Alternative service provision – active link (young disabled); ‘S22’ service; voluntary car service 3) Membership of Gloucester Minibus Scheme – borrower; lender; broker 4) Joint ventures with other community transport providers OR voluntary organisations Agree on priorities Develop detailed plans	30/4/04 31/3/05 31/3/04 30/6/04 (ongoing) 31/3/04	GCDAR MD / GCDAR	2004 pilot To be discussed To act as broker 2004 pilot
Review scheduling procedures	30/11/03	Drivers and support staff	Done
Review of working hours Draft recommendation of necessary resources to meet existing needs	30/11/03	GCDAR	Done In progress
Implement a Quality Assurance Scheme	31/12/04	GCDAR	In progress
Review office practices and procedures Draft proposals where changes are appropriate Agree and implement proposals	31/3/04	Support staff	In progress – will form part of QA system above if implemented
Review of skills of all members of GCDAR organisation Draft recommendations for training and development plans	30/9/05 31/12/05	To be agreed	
Review booking methods and times	30/4/04	MD / GCDAR	

5. Volunteering plan

Activity and output	Target date	Owner	Status
Review management committee and other volunteer policy / approach Draft revised policy	30/4/04 - 31/12/04	Management Committee / MD	
Identify number and type of volunteers wanted. Do in conjunction with identifying specific roles for existing committee members.	30/6/04	Management Committee	
Create, review and revise volunteer pack	30/6/04 – 31/3/05	Management Committee / MD / JD	
Advertise for volunteers (management committee, escorts and drivers) Recruitment process	30/9/04 – 31/3/05 31/12/04 – 31/3/05	Management committee / SB	
Assess how to link with volunteer agencies / businesses in the community Produce and distribute approach material Develop long term volunteer programme	1/4/05 – 31/3/06	MD / JD / John O’Leary / Mgmt Committee	

Section 5 - Financial Information

Gloucester City Dial-a-Ride has been running a successful and efficient non-profit making organisation since 1986 due to prudent and thorough financial management.

The organisation has experienced organic growth as the service became visible in the City. This has meant that passenger numbers and the need for additional buses increased 'hand in hand'. In the last few years growth has slowed but the organisation has benefited from increased fare revenue and fundraising when demand required it.

To enable a greater focus on development and an assessment of the future a 3 year business plan was developed in 1997. This did create a benchmark and has met with considerable success –

- Two additional buses have been added to the fleet
- 500 new members have joined

However, a number of desired developments are still to be progressed, including extending the service to weekends and evenings and implementing a fundraising committee. These goals now form part of this business plan.

A review of the income and expenditure accounts for the five financial years 1999 to 2003, a consolidated version is attached at Appendix 1, highlight a number of areas worth noting –

Expenditure

- Insurance – this has risen significantly over the five years
- Training – has shown a low priority until 2003
- Advertising – the expenditure on this has reduced and this may partially reflect the reason for no net gain in active members and a gradual reduction in passenger trips
- Management and Administration – a consistent outlay in this area with exceptions in 2001 for sessional expenses and 2003 for staff expenses and sundries

Income

- Donations and fundraising – effective fundraising has taken place when new buses have been required. A strategy and committee now needs to be put in place to secure a structured approach towards financing bus replacements and other development proposals
- Fares – revenue has increased significantly reflecting the additional buses and higher fares per passenger

These accounts provide an excellent basis to make financial projections for the following five years, taking account of the organisations aims to further develop the passenger base and service provision -

Financial plans for 5 years from 2004 to 2008.

Expenditure	2004	2005	2006	2007	2008
Direct					
Vehicle running (1)	23550	26458	27252	33683	39296
Vehicle leasing (2)	3000	0	0	9000	18000
Vehicle depreciation	11725	11725	12077	12439	12812
Salaries & NI (3)	74300	93812	96626	111270	126705
Escort expenses	450	500	515	530	546
Telephone	1550	1550	1597	1644	1694
Insurance	1030	1060	1092	1125	1158
Rent	9943	9943	10241	10549	10865
Training	500	515	530	546	563
Computer (4)	4560	2000	2060	2122	2185
Other office expenses	1580	1580	1627	1676	1727
Fundraising & publicity					
Advertising (5)	450	1000	1030	1060	1092
Mgmt & Admin					
Sessional	1150	1185	1221	1257	1295
Stationery & Postage	880	906	933	961	990
Staff exp. & Sundries	1200	1236	1273	1311	1351
Audit	1250	1288	1327	1366	1407
TOTAL EXPENDITURE	137118	154758	159401	190540	221686
INCOME					
Donations & fundraising (6)	0	10000	20000	30000	10000
Grants (7)					
Glos. County Council	47000	48410	49862	61629	74057
Glos. City Council	34904	35950	37029	45766	54995
BSOG	5400	5562	5729	7081	8509
Bank Interest	500	500	515	530	546
Fares (8)	44000	51500	58350	72120	95330
TOTAL INCOME	131804	151922	171485	217126	243437
PROFIT / LOSS	-5314	-2836	12084	26586	21751

NOTES TO FINANCIAL ASSUMPTIONS

Overall financial assumption is an increase of 3% pa in income and expenditure due to inflation.

(1) 2005 5 buses running; 2007 6 buses running; 2008 7 buses running

(2) 2007 1 new bus leased; 2008 2 buses now leased

(3) 2005 Additional driver hours to maximise use of 5 buses (assume 50 hours per week) and additional admin hours of 10 per week; 2007 1 new f/t/driver; 2008 another new f/t driver

(4) 2005 reduction in outlay reflects extra cost in 2004 for Development Worker

(5) 2005 additional cost required to better publicise service and this needs to be maintained

(6) 2005 strategy put in place with timetable for specific projects and fundraising activities

(7) 2007 and 2008 additional grant for new buses

(8) 2005 5th generating comparable fares; 2006 10% increase in passenger trips; 2007 and 2008 as 2006 plus fully utilise new buses

At this stage no account has been taken of the potential revenue (or costs) that could be generated (incurred) from items such as -

- Membership of the Gloucester Minibus Scheme
- Extension of the working hours of the operation
- Introduction of annual subscriptions

Section 6 - Management and staff

Current organisation

Gloucester City Dial-a-Ride continues to successfully provide a community transport service backed by its management committee, staff and volunteers. Current resources are –

Management committee -	6
Staff -	10
Volunteers -	2

See Appendix 2 for details of the structure and responsibilities of office staff.

Management committee

The committee is an established and enthusiastic group, who have been involved with GCDAR for at least 5 years. It comprises a Chair, Secretary, Minutes Secretary, Treasurer and two elected members. Also invited to attend meetings are two ‘ex-officio’ representatives and a driver’s representative.

The committee oversees the operation by holding six-weekly meetings, whilst the chair and the secretary also meet with the GCDAR Co-ordinator, who manages the day-to-day operation, on an ad-hoc basis.

To facilitate further improvements in the management and operation of the service a number of actions should be taken –

- Recruitment of additional committee members
- Include user representation
- Specific roles to be taken by all members
- Sub-committees to be set up as appropriate, eg fundraising and volunteers
- Recording of skills and experience of existing and new members to identify the strengths in the organisation and assist with any training and development needs
- Agreed monthly meetings with the Co-ordinator
- Spending time on the buses

Staff

GCDAR staff comprises office and drivers.

Office – 4 (3 part time)
Drivers - 6 (1 full time / 5 part time)

The two groups work together to maintain the operation 9-5, Monday – Friday. All are committed to offering the service to suit the users and will accommodate their needs as far as possible. Morale is generally high within the two groups either when working within their own group or together.

To facilitate further improvements in the operation of the service a number of actions should be taken –

- Assessment of the office hours worked and required
- Implement structured training and development plans
- Implement methods to assist in motivating staff
- Assessment of succession planning needs and the level of risk of ‘key members’ leaving the organisation
- Organise and maintain regular meetings between office staff and drivers
- Office staff to go out on buses

Volunteers

Currently the service benefits from one volunteer driver and one volunteer escort.

Normally they work 1-2 days per week but this varies with other time commitments.

There is a clear need to recruit more volunteers.

To facilitate further improvements in the operation of the service a number of actions should be taken –

- Recruit additional drivers and escorts
- Consider use of volunteer car drivers in conjunction with minibus fleet
- Develop structured volunteer policy
- Develop volunteer pack
- Develop ‘short course’ volunteer programme for organisations such as The Prince’s Trust

Action plans for people

Resource	Activity	Owner	When	Output
Management committee	Document skills, experience and training	Mgmt Committee	30/6/04	Record held Develop training and development plans Identify volunteer needs
	Create organisational chart detailing roles and responsibilities	Mgmt Committee	31/7/04	Organisational chart
	Advertise for new committee members	Mgmt Committee	30/9/04 – 31/3/05	Advert Interview and recruit new members
	Co-opt a service user to the committee	Mgmt Committee	31/3/05	A user on the committee
Staff	Record 'wish list' ideas	Staff	31/8/03	Review and prioritise. To be taken forward by Fundraising and Management Committees.
	Update organisational chart with roles and responsibilities	Administrator	3/2/04	Organisational chart
	Document skills, experience and training received	Staff	1/4/05 – 31/3/06	Record held. Identify skill gap against role and responsibilities
Volunteers	Document skills, experience and training	Volunteers	1/4/05 – 31/3/06	Record held Identify skills gap
	Record 'wish list' ideas	Volunteers	31/8/03	As 'staff' above

Section 7 - Monitor, evaluation and review process

The preceding sections outline the actions and goals for the organisation and individuals, which will allow the service to grow and develop. It is of course critical to assess the success of proposed actions and developments against agreed targets by a system of monitoring and evaluation. Without this plans can become unwieldy and aimless.

Regular reviews of action plans and objectives will occur via staff, line management and committee meetings.

Overall monitoring of the impact of aims will be done on six monthly and annual bases with the Management Committee. Record of planned versus actual results will occur at each review. This may well lead to revised action plans or approaches to meet the development wants.

The following details targets and timescales for the strategic aims of GCDAR.

Aim	Target	Timescale	Progress	Date
To increase the number and diversity of its active membership	Conduct feasibility study and complete consultation review	31/12/04		
	Increase number of users by 10% (and same for following 3 years)	31/3/05		
	Increase number of passenger trips by 10% (as above)	31/3/05		
	Implement Marketing Action Plan	31/3/05		
	Increase number of users between 18-60 by 50% (10% for years thereafter)	31/3/06		
	Increase number of users from Black and Minority Ethnic groups by 25% (10% for years thereafter)	31/3/06		
	Increase number of male passengers by 10% (and same for following 3 years)	31/3/06		

Aim	Target	Timescale	Progress	Date
To become more sustainable and grow to meet actual need	Produce an action plan to improve service accessibility	31/8/04		
	Introduce a fundraising committee and develop a 3-5 year fundraising strategy	30/9/04		
	Conduct a feasibility study	31/12/04		
	Develop management committee and other volunteer recruitment policy	31/12/04		
	Conduct a feasibility study	31/12/04		
	Pilot MOBISOFT software	31/12/04		
	Join local brokerage scheme as a broker and lender	31/3/04 – 31/3/05		
	General sponsorship / fundraising activities to generate at least £2500 pa	31/3/05		
	Develop partnerships with 2 -5 Voluntary / Community Groups	31/3/05		
	Review minibus replacement strategy	31/3/05		
	Consider integrating GCDAR with a voluntary car service	31/3/06		
	Increase fare revenue by 20%	31/3/06		
	Replace 2 minibuses and/or purchase 2 smaller vehicles	31/3/06		
	Consider developing transport services complimentary to Dial-a-Ride	31/3/06		

Aim	Target	Timescale	Progress	Date
To improve its efficiency in delivery, staff development and user involvement	Production and distribution of quarterly passenger newsletter	1/4/04 – 31/3/05		
	Consider extending booking facilities to include text, e-mail and text phone	30/6/04		
	Introduce a quality assurance system	31/12/04		
	Pilot MOBISOFT software	31/12/04		
	Conduct feasibility study	31/12/04		
	Develop management committee and other volunteer recruitment policy	31/12/04		
	Increase in customer compliments by 25%	31/3/05		
	Reduction in customer complaints by 25%	31/3/05		
	Management committee and staff increase involvement with passengers	31/3/05		
	Passenger records are updated to 90% complete	31/3/05		
	Review office practices and automate where possible (target 2-5)	30/6/05		
	Implement regular staff reviews and development plans	31/3/06		

Appendices

Appendix 1 – Consolidated financial accounts

Appendix 2 – Organisational structure and responsibilities

Appendix 1 – Consolidated financial accounts

Expenditure	1999	2000	2001	2002	2003
Direct					
Vehicle running	18425	18004	16795	17836	22525
Vehicle leasing	7751	9623	9623	9623	9623
Vehicle depreciation	3833	9590	15523	13043	12341
Salaries & NI	61000	65717	64614	72716	69822
Escort expenses	429	512	348	124	244
Telephone	1002	1227	1106	1324	1283
Insurance	455	570	629	721	911
Rent	5207	5484	5935	6044	4497
Training	137	25	191	175	516
Computer	0	717	1564	995	1474
Other office expenses	632	788	938	750	1225
Fundraising & publicity					
Advertising	310	494	182	213	138
Mgmt & Admin					
Sessional	832	610	1528	921	926
Stationery & Postage	550	415	466	489	647
Staff exp. & Sundries	647	686	862	775	1032
Audit	500	500	500	532	540
TOTAL EXPENDITURE	101710	114962	120804	126281	127744
INCOME					
Donations & fundraising	10667	49349	11520	15	470
Grants					
Glos. County Council	40584	41354	43500	45450	47249
Glos. City Council	34137	34252	34904	34904	33000
BSOG					2628
Bank Interest	1369	1271	1401	777	452
Fares	30587	36656	39498	39248	39384
TOTAL INCOME	117344	162882	130823	120394	123183
INCOME (excl fundraising)	106677	113533	119303	120379	122713
PROFIT / LOSS	15634	47920	10019	-5887	-4561
P / L (excl fundraising)	4967	-1429	-1501	-5902	-5031

	Costs increasing / income reducing		Costs reducing / income increasing
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Appendix 2 - Gloucester City Dial-a-Ride Organisational Chart

