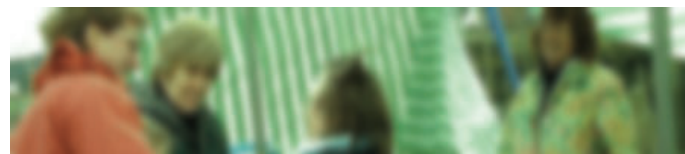


cbt Qld TOOLBOX

‘ **Community-based transport
from planning to action** ’



**Make getting from A to B safe, easy, accessible and affordable
for individuals and groups in your communities**



LOCAL GOVERNMENT
ASSOCIATION
OF QUEENSLAND INC.



**Queensland
Government**
Queensland Transport

Helen Ferrier & Associates Pty Ltd



Community-based Transport Queensland Toolbox

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Foreword

In every community, there are individuals and groups for whom the private car and mainstream public transport are not suitable or practical.

Personal access and mobility are big influences on quality of life and those of us involved in transport planning are constantly seeking ways to improve access and mobility and make it available to as many people as possible.

The community itself is often the best authority to advise on and address the needs of its members who cannot easily access transport. But even where there is the will within a community to do so, this is no easy task. How to get started? What needs to be done next? How best to do it?

The *Community-based Transport Queensland Toolbox* provides the answers to these and other relevant questions. It is a practical, hands-on, 'do-it-yourself' kit designed for individual workers, groups and even local councils wanting to implement solutions to community transport needs.

It complements the *Community-based Transport Queensland Guidelines*, which provides local governments with options for solving transport problems and offers examples of the action taken by other councils to address their transport challenges.

Primary responsibility for transport in the state rests with Queensland Transport but the *Toolbox* and *Guidelines* have been developed with the assistance of the Local Government Association of Queensland. The close collaboration between our organisations in producing these publications reflects the importance we place on the development of community transport initiatives.

Each sphere of government has a role to play in delivering transport solutions to the community and we hope the *Toolbox* and *Guidelines* become valuable aids in planning and improving transport access and options in Queensland communities.

Hon Paul Lucas MP
Minister for Transport and
Main Roads

Cr Paul Bell AM
President
Local Government Association of Queensland



Taking a developmental approach

It begins with a mindset

So transport is a problem in your community? You want to ‘fix’ the problem but don’t know where to start? Or you (or someone else) have tried to fix it, or have started to, and you’ve found it not that easy? Or you wish a bucketful of dollars will fall from the sky to buy that bus everyone says will ‘fix’ the problem?

Unfortunately, bucketfuls of money spent on a bus or any other single solution usually only ever ‘fix’ one particular transport problem, for a particular set of people, on a particular day, at a particular time, on a particular route, over a particular period of time...and then the ‘fix’ wears out as people and conditions change.

This Toolbox is designed to help you think and act developmentally – taking a transport problem, re-casting it in terms of access/mobility, teasing out all the variables, working as closely as possible with those most affected by the problem and applying responses that will address a range of issues for a range of people in your community...and builds in a review of the issues to account for changing needs.

This is a holistic approach – looking at all the issues, in particular the issues behind the issues. For example, what looks like a need for a bus can sometimes really be that elderly people have access to a bus, but they do not use it because they can’t get up and down the high steps which is another problem entirely and requires a different tack.

However, the quick fix is a part of our modern lifestyle and the temptation to just ‘get in and do it’ is everywhere. Lesson Number 1 in working developmentally is to slow down, perhaps even stop altogether and start your thinking all over again. It does not mean that what you’ve done to date is wasted, it may just need reviewing and changing tack or simply fine-tuning.

Working developmentally is slower, muckier and at times can seem to be going nowhere. In fact, it is often two steps forward and one step back, but it is progress. The very nature of this process is meant to be a little less controlled and a little less predictable. If you are working with a number of people or groups of people to solve a number of issues (remember the holistic approach), then the dynamics of this will be unwieldy. There are many contributing factors that will influence outcomes besides your own thoughts, will and desire.

So why work developmentally? Because it usually works...eventually. It’s also a more sustainable way of problem-solving. If you work on the issues behind the issues and across a number of factors you will get better results, especially where the resources that you need to mobilise to solve the problem aren’t yours in the first place.

Finally, the most important reason to work developmentally is because it involves people solving issues for themselves or for those they feel profoundly responsible for. This is a really powerful and motivating dynamic. The more control people sense they have, the more motivated they are to exercise their energy, time and even money in making something work.

The challenge for those who want to work developmentally is to put your own desire for control on hold and facilitate or enable the control to be appropriately exercised by those for whom you are ‘fixing’ the problem. This Toolbox will give you the principles, the processes and the tools to do just that.



Principles of practice – pathways to action

Working developmentally requires a set of guiding principles. Unfortunately it is not about specific rules – that would be too easy!

A principle is simply a code or general belief (or general rule if you like) that is entrenched in your mind and when you need to make a decision you apply the principle to the situation and bingo, you have a reasonable chance at having made a sound decision, because it's based on something you know is reliable.

The challenge to applying principles is figuring out how each principle relates to your particular situation. It therefore requires interpretation and more energy, time and effort to apply, but it's worth it.

The following principles for working developmentally in transport are based on knowledge gleaned from those who've weathered the storm before you...what an advantage to learn from others' mistakes and successes!

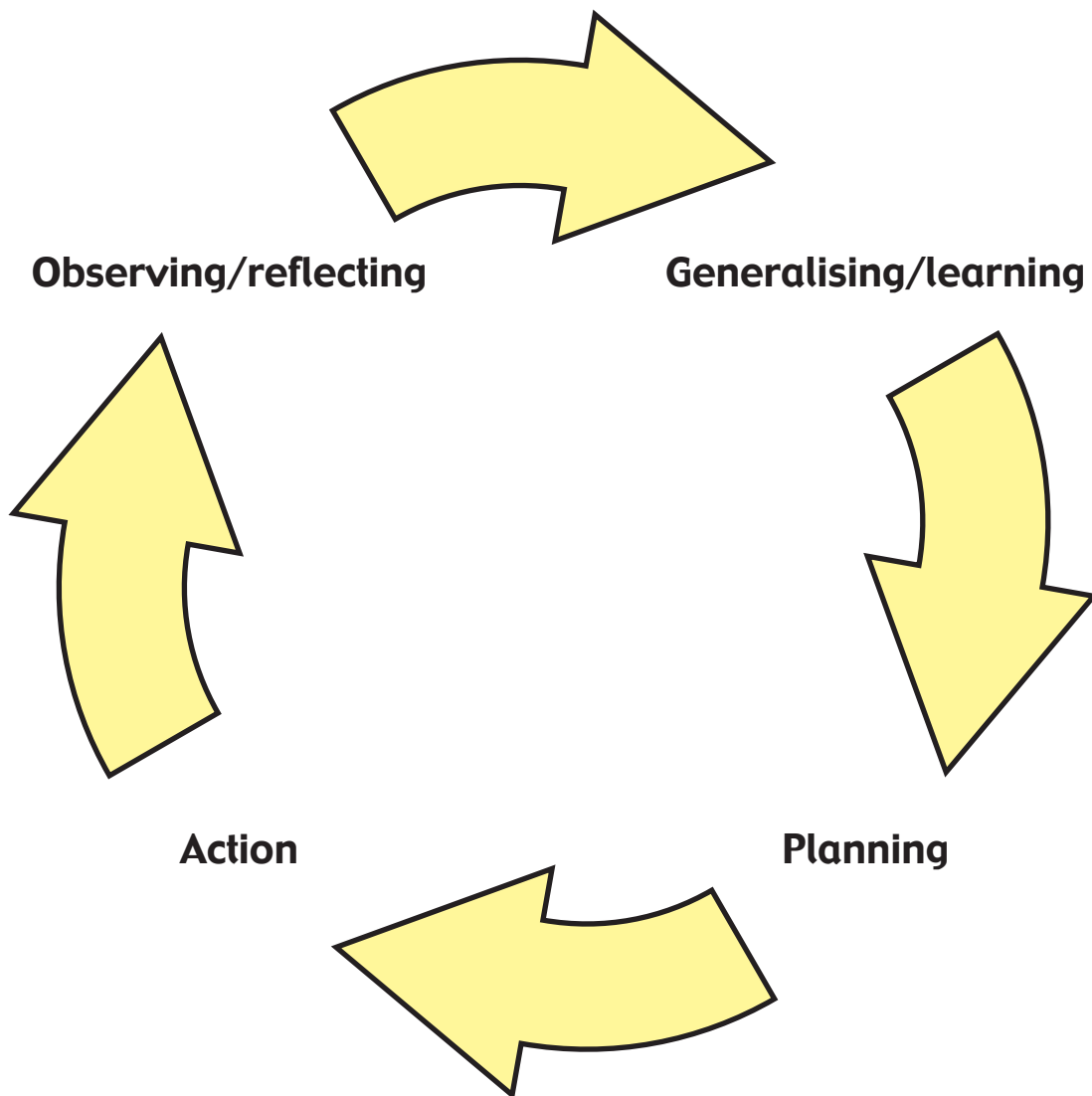
The principles are also based on sound community development and primary health care theory and practices that have been applied across different areas – from community services and groups to local economic and social development.

The recommended principles of practice are:

- **Community participation or community driven** – by appropriate people living and working in the community.
- **Self-determination or empowerment** – when and where possible enabling people to have some control and be involved in assessing the problems and the decision making processes that ultimately affect them.
- **Needs-based planning** – mapping what already exists, comparing with other communities, collecting data, observing trends and, most importantly, listening to the people who know and experience the problem.
- **Access** – ensuring transport is affordable, appropriate, available, safe and comfortable.
- **Equity** – recognising and providing for those groups who are most transport-disadvantaged.
- **Collaboration** – with other providers and sectors to coordinate effort, share resources, information, problem solving and action planning.
- **Appropriate use of technology and resources** – making better use of resources that already exist and where needed having technology that services and communities can afford.
- **Sustainability/community capacity** – having responses and solutions that will last over time and build up the capacity of the community to support the solutions.
- **Integration** – bringing it all together to form a comprehensive response that links in with other community or transport-related plans, infrastructure and activities.
- **Action learning** – responding to problems with a learning cycle of action. This involves integrating theory and practice, utilising reflective tools, having a mentor and a network of people to safely bounce ideas, challenge and be challenged.



The learning cycle:



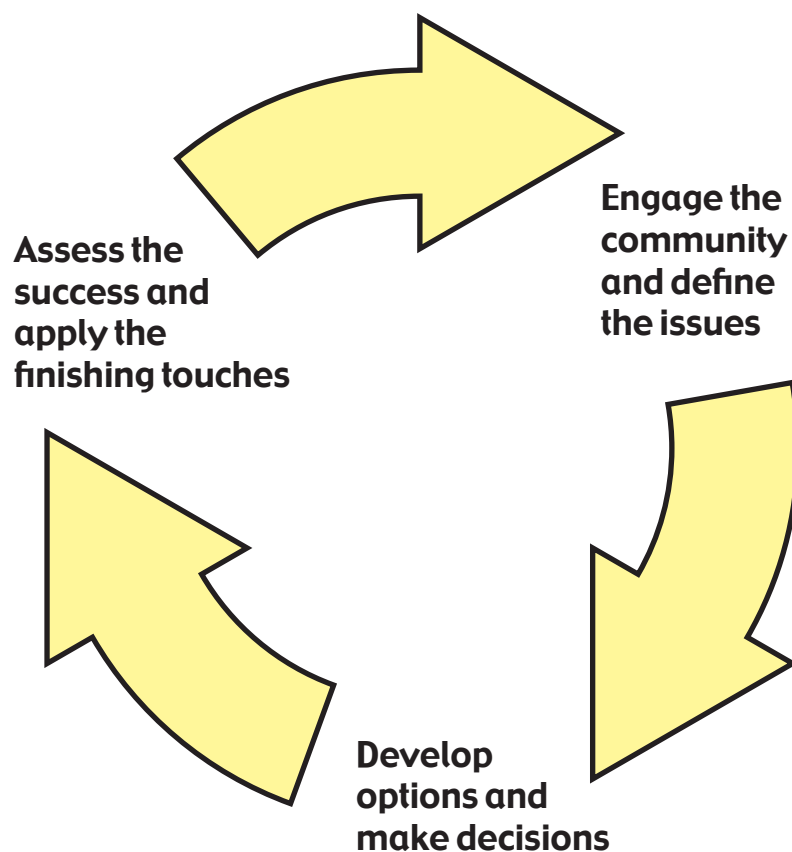
The essence of working developmentally is to build relationships. None of the above can be effectively done without the right type of relationship with others. The main skill of the person who drives any kind of transport development is to have the facilitation or enabling skills to work with people rather than for or on them.



Applying the principles

Although the toolbox takes you through the basic steps in transport development – from engaging with the community, defining issues, developing options, making decisions through to assessing success – the process is not necessarily this linear in practice. Think of the toolbox in a more cyclical way and be prepared to come back to any stage of the process that wasn't developed the first time around. This is more in tune with the reality of development – it is difficult, if not impossible, to get everything right the first time around.

The developmental cycle:





Engaging the community

The most important first step in transport development is to determine the level of engagement with the community. This approach will guide your decision making and will help to promote a sustainable decision that is technically feasible, economically viable and publicly acceptable. Without this critical step you cannot work developmentally – or any attempts to work without the community on board could be thwarted and a waste of time.

What is community engagement?

Community engagement is any process that involves the public in problem-solving or decision making and uses public input to make decisions. Community engagement refers to connections between governments, citizens and communities on a wide range of policy, program and service issues. In short it is:

- **Building relationships** with the community;
- **Sharing information** with the community;
- **Listening to input** from the community;
- Using the input to **improve decision-making**; and
- **Informing** community of **how their input influenced** the decision.

Good practice community engagement is GOAL and OBJECTIVES driven.

What level of community engagement is desirable?

A general rule of thumb is the more highly complex an issue, the more controversial and the more impact it has on people the higher the level of public input will need to be. However, it is important to involve a range of stakeholders in scoping, or accurately determining, what the issue is and what the level of complexity and impact are. *Remember we all see things differently or from our own perspective.*

Do not choose a level of public input that exceeds your ability to honour the promise or commitment made within that level. For example if you have said you wish to involve people in the decision making you are making a commitment to ensure that the communities concerns and aspirations are directly reflected in the alternatives developed.

Do not promise more than you can commit to – and do not forget the important feedback loop!

The International Association for Public Participation (IAP2) Spectrum is a tool that has proved to be invaluable for practioners of community engagement. The Spectrum outlines the varyingly level of public participation (community engagement) and the commitment we make when we engage at this level.

More is not necessarily better!

The level of community influence in the decision making process will depend upon the issue and the complexity and the passion that surrounds the issue. It is wise to choose the spectrum level carefully so that community confidence and trust in the process is honoured.



IAP2 Public Participation Spectrum

Developed by the International Association for Public Participation

INCREASING LEVEL OF PUBLIC IMPACT

INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
Public Participation Goal:	Public Participation Goal:	Public Participation Goal:	Public Participation Goal:	Public Participation Goal:
To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
Promise to the Public:	Promise to the Public:	Promise to the Public:	Promise to the Public:	Promise to the Public:
We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Techniques to Consider:	Example Techniques to Consider:	Example Techniques to Consider:	Example Techniques to Consider:	Example Techniques to Consider:
<ul style="list-style-type: none"> ● Fact sheets ● Web sites ● Open houses 	<ul style="list-style-type: none"> ● Public comment ● Focus groups ● Surveys ● Public meetings 	<ul style="list-style-type: none"> ● Workshops ● Deliberate polling 	<ul style="list-style-type: none"> ● Citizen Advisory Committees ● Consensus-building ● Participatory decision-making 	<ul style="list-style-type: none"> ● Citizen juries ● Ballots ● Delegated decisions

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What is a community?

It usually means a group of individuals with some kind of connection. This could be people living in a particular area – connected by geography and location, for example a city, suburb, town or district (community of place). Or it could be people with common origins, values, beliefs or interests such as the indigenous community or a religious community or simply elderly people who meet regularly to play cards at the local hall (community of interest). Some groups within communities may be considered ‘hard to reach’ groups. Engaging these groups will require different and well thought through approaches and techniques.

Which community?

It's important to identify who the community is you will be working with – what connects them? There may be several different communities or subgroups within the main community that are affected by or interested in transport issues.

Separate the service providers from the people who are affected by the problem. You need to work with both, but identify their different perspectives. The following are considered to be the main groups who experience transport-disadvantage¹:

- **Young people** – unlicensed or restricted licence and dependent on parents or others.
- **Non-car owners** – difficulty getting to employment, training and so on.
- **Older people** – reducing functionality can affect ability to drive or access public transport.
- **Low income earners** – lack of money to own car or run it or afford cost of public transport.
- **Home workers** – may not have access to family car; may be unlicensed; may be responsible for transporting children; may have pram or baby capsule.
- **People with disabilities** – functionality can affect ability to drive or access public transport.
- **Migrants/new residents** – lack information or language skills to access services.
- **People who live in rural and remote areas** – often have no access to public transport and have to travel exceptionally long distances just to access basic goods and services.

Look for groups that represent the transport-disadvantaged, for example Senior Citizens, University of the Third Age, National Seniors, older people's advocacy groups, local youth groups, high school student council, or disability advocacy groups for people with a disability.

¹ Department of Public Health, Flinders University, South Australian Community Health Research Unit. Transport and Health Assessing the Impact, p.16, February 1998.



Who are the ‘stakeholders’ or key people of the community?

Identify who the key people are in your community. This includes the leaders but also others known as the ‘gatekeepers’ – people who do not lead but are actively involved and are the key to your entry into their community. For example the mayor of a shire may be the leader but may not be the best contact, whereas one of the local council councillors may be the person who is most passionate about transport issues and the one to engage with.

Utilise any known contacts and use this as a starting point – ‘snowball’...asking each new contact who else you should make contact with and so on. Also utilise such resources as community directories, service directories and contact lists.

Include the mainstream transport operators in your list of key people – taxi operators, bus operators (including school bus operators), courtesy bus operators, limousine operators.

If you are working with indigenous communities you usually need permission from the local elder or indigenous council/group to gain community entry. There can be particular cultural traditions you need to be aware of – always consult with local indigenous liaison workers or locals who are aware of local tradition.

How to gain community entry and build relationships

If you are known in your community, have credibility and already have local linkages and networks you are halfway there. Those who work developmentally in their own community have better opportunities to progress issues. However, there can be a down side, with people expecting you to act the way you always have (which could be difficult if you’ve started in a new position or are approaching things differently) or you may overlook the obvious because it has become second nature to you or you may have difficulty challenging people you are close to but who are working ineffectively.

Those who come from the outside need to allow time, and use all their interpersonal skills to build their networks and relationships to a point of being trusted and having sufficient credibility. Outsiders can, however, bring some advantages with an objective viewpoint and a distance with people that allows some challenges to take place more readily.

The issue of presence is integral to community engagement and often overlooked when outsiders try to engage with a community. Most human beings are territorial to a degree and this needs to be treated with due respect and a sensitive approach. Outsiders are often ‘checked out’ for small hints of their personality, trustworthiness, reliability, timeliness and attitude. The initial messages you give (both verbal and nonverbal) will be critical. The following are ‘tips’ for manifesting the right kind of presence and maximising your chances of effectively engaging with the community:

- Introduce yourself – provide a little bit of background on any relevant experience you have and explain clearly your purpose in wanting to make contact and the transport development issue you are working on. This can be via a letter/e-mail/phone call to the key people and organisations or at a network meeting, work meeting or local council meeting or over a coffee.
- Go to the community – meet people on their territory and at times that best suit them – be prepared for after-hours contact.
- Be self-aware of your personal image, speech and language – try to be ‘on level’ with the person or group you meet with, without compromising your own identity too much. This may just mean adjusting your dress or jargon to suit the group.
- Read the local newspaper or newsletters – this will give you a real insight into the culture



and values of the community and keep you abreast of the issues the community is currently focused on.

- Identify the value differences and the commonalities – assume there will be differences but look for the common ground and shared vision. Often everyone has the same outcome in mind such as to improve transport options for people most in need, but there is difference around how to get there and who should do it.
- Be aware and sensitive to cultural differences and traditions – this applies to indigenous, ethnic and even rural culture. Indigenous culture usually requires permission from the local elder prior to community entry.
- Actively listen – this often begins with listening to the other person’s story. Ask questions and allow time for people to respond. Acknowledge and validate their story.
- Be genuine – ensure that what you say is congruent with what you do.

Community readiness

You need to assess the community’s readiness to develop access options. Although transport may have been identified as a major problem, the timing to progress anything is critical. If key stakeholders are in a state of flux then it is better to wait until they are ready to take on a development project. Or a community may have been through a rash of developmental projects or an exceptionally difficult project and needs to have a break before tackling another. Learn to read the energy and where it is.

Ask if the people who are experiencing the transport difficulties are ready to bring what is essentially their private story into a public arena, with others, to bring about action.

It is also worth questioning your own readiness to take on transport development. Assess or have someone assess your own capacity. It may simply mean tackling a less ambitious goal. Do not take on more than you can chew. Transport development is not for the faint-hearted – it is a complex and unwieldy arena with many players, tight legislative requirements and is a growing issue with high public expectation.

“Readiness is also about willingness to question, to act for the wider public good, to tackle hard issues and to value the opportunity to learn.”²

Community participation

Once you’ve established a relationship, heard and understood the initial transport story and feel that you and the community are ready to progress, then consider a gathering of people to progress the issues, guide, support and perhaps even control the transport development process.

This could be an existing group who are keen to progress transport issues and act as a reference group, for example a local council working committee, an interagency group, citizen action group, or a new group may form that drives the focus on transport.

A good cross-section of the community is recommended and the following balance of representation for transport development has been successful in other communities:

² Queensland Health, Community Public Health Planning in Rural and Remote Areas Program for Public Health Services Workshop – Presence.



- local council
- community leaders/interested community members
- service providers
- commercial operators
- consumer groups.

Whether it is an existing or new group, there are some basic principles for success.

People will become involved if they:

- feel they are trusted
- have the power to act
- can see some progress in what they are doing
- are able to satisfy their individual needs in a group, hopefully contributing to meeting the needs of the group at the same time³.

The SIMPLE formula encourages participation:

Small groups

Interest-based groups

Meaningful outcomes

Personal contact

Loose structures – allow people to choose the level of involvement that suits them.

Easily accessible⁴

The section, Implementation – From planning to action, provides more detail on ongoing community participation and the difference between management committees and reference groups.

Also see the following website for more information on transport reference groups:

www.transport.nsw.gov.au/countryresource/guides/groups.html

Agency collaboration

Although engaging with the community means working with those closest to the problem or issues, it also means working with and across agencies or service providers. You may be a service provider or work for an agency and will understand the importance of working together or collaboratively with each other.

The same principles of relationship building with communities apply to working across agencies. Often there is merging of ‘community’ with local agencies – the people who work in agencies usually live locally and are part of the community. However, you should always make a distinction between those who are providing a service and those receiving the service.

The agencies that are most likely to provide a transport service or have a vested interest in transport are the following:

³ Jeremy Mcardle, People Projects cited in Queensland Health. *Community Action, Planning and Information Resource*, 2000.

⁴ *Ibid.*



- aged care agencies – such as Blue Care, Anglicare, Ozcare;
- neighbourhood centres;
- Community Health;
- hospitals;
- aged care residential facilities;
- disability agencies and services;
- Queensland Ambulance Service (QAS);
- local councils;
- transport operators – bus, taxi, rail and air;
- schools/TAFE/universities;
- playschool group/mums' support groups; and
- major employers/factories in the area.

An alternative to a reference group is a working group. This can sometimes be just service providers or service providers plus community members. A working group is usually short-lived for the period of development and focuses on working on a particular issue. It can be an informal group that meet as the needs arise or more formally with set terms of reference. Working groups usually combine collective thinking and knowledge to guide and advise a process.

Developing partnerships is a more formal relationship between agencies. It usually implies an exchange of resources to improve efficiencies and pool scarce resources. However, there are challenges with any kind of partnership arrangement. See the section on Partnerships or pooled funding for more detail.

LGAQ community engagement framework

In addition to the process of community engagement outlined above, another best practice model is that developed by the International Association of Public Participation (IAP2). The LGAQ has worked in collaboration with the IAP2 to develop the LGAQ Community Engagement Framework. The framework comprises the LGAQ policy position, training program, champions program, tools and case studies.

This user friendly model is now being used extensively by local governments in Queensland and delivering tangible results. The IAP2 Public Participation Toolbox and information on training and networking opportunities may be sourced from the IAP2 website: www.iap2.org or from the Australasian chapter website www.iap2.org.au

Local government in Queensland may access further information on the LGAQ Framework and the IAP2 model, including training opportunities, from the LGAQ Social Policy Advisor on 07 3000 2216.



Identifying needs

Existing research/reports

Sometimes transport has already been identified as part of a broader-scale community needs assessment. Find out if this has occurred in your community and to what extent transport needs were identified. You may have enough information without any further work or you may need to update the information if the assessment is several years old.

It is also wise to consult other literature and reports on transport-related issues to gain some background knowledge and see what's been done in other areas. It will save reinventing the wheel. A list of useful references is attached at the back of this toolbox. Also ask other agencies for existing reports or research on transport-related issues that they may have.

The companion publication to this Toolbox – CBT Queensland Guidelines – contains a discussion on generic unmet transport needs that you might find useful at this point.

The appendices also point you in the direction of funding opportunities – you may need additional resources to kick-start transport development with a needs assessment phase.

If you have already engaged effectively with the community you will have some idea of the access and mobility problems being experienced. You may even be ready to implement a solution if everyone has been very clear about the issues and how to solve it. However, it is worth investigating the issues further – there could be something overlooked that you will regret not defining at the beginning.

Also, a clearly documented process of identifying needs is often a requirement of funding bodies and will assist with demonstration of community consultation and proper planning processes for meeting service standards, funding submissions and other broader-scale transport planning.

Full-scale needs assessments are not always necessary. They are time-consuming and costly. They also require a lot of commitment to follow through with recommendations which can be quite lengthy and detailed and not open to the action learning cycle that is recommended in development work.

A scaled-down needs assessment that focuses on consulting with those closest to the problem is recommended. The smaller the community, the less effort and resources need to be invested in this step. A needs assessment is sometimes called a feasibility study – although this is often about studying the feasibility of a solution. A needs assessment is a more open inquiry.

The scale of your inquiry/needs assessment

This will depend on several factors, including:

- what transport questions you need answered;
- the area covered – a small town/suburb or large district/region;
- the time allocated;
- the funds available; and
- the skills of those doing the needs assessment.



There are several ways of going about a needs assessment. The following approach is appropriate to transport development that perhaps you, a community development worker or your transport reference group could implement in a localised area. It requires only a minimum of resources and basic skills. But be aware of the limitations of this simplified process – it will give you only a basic picture of needs. A more complex process requires more specialised skills and more resources but will probably give greater depth and detail to the result.

The mapping tool at the end of this toolbox can be used for this basic needs assessment phase. Don't be put off by all the sections and questions listed below. You can make this a simpler process by interviewing the people in the know – those key people you've identified in the community. Their local knowledge will be an enormous resource.

Stages of your inquiry/needs assessment

1. Community or regional profile

Understand the community or region you are working with. What is it about this area that makes transport access so difficult? The following are some of the characteristics you would look for:

- **The geography** – what size area, how many towns/suburbs, what distance from goods and services (including public transport) do people live?

If your community is in a regional area you can find out how the town or shire is classified in relation to access to goods and services – go to the Australian Institute of Health and Welfare's website www.aihw.gov.au and look for the publication *Rural, Regional and Remote Health – A Guide to Remoteness Classifications, 2004*. Cost \$20.

- **The industries and infrastructure** – what industries support the local economy (agricultural, mining, tourism) and what sort of public and private facilities are there (shire council, shopping mall, library, community centre, parks, media outlet, education and training facilities). Where do people (particularly transport-disadvantaged people) need to go to, to participate fully in their community? Think education, employment, social, sport, recreation, business and health-related destinations.
- **The demographics** – go to your local shire council for the latest community profile from the Australian Bureau of Statistics (ABS). Look for population rates, ages, ethnicity, income, car ownership, unemployment rate and similar data and compare with the state average or other areas. What makes this community different?

You can create an index of transport-disadvantage using the indicators of household income, employment, family composition and vehicle ownership. This may be beneficial if you are not familiar with a community or you are working across more than one community in a large region. The process is detailed in *A Step by Step Guide to establishing a Rural Community Passenger Network*, Sciens Consulting for the Office for the Status of Women and Passenger Transport Board, South Australia, 1998, pp. 15–32.

2. Map the existing capacity/services

What do the people already have that can be built upon or worked with to improve? This is about recognising what individuals have and what communities have and acknowledging that what has already been developed is the result of someone else's hard work in the past. Rarely is there nothing.



Recognising the capacity of individuals and communities overall can gauge where to start. It also helps to sort out the wheat from the chaff – sometimes people and communities ask for things that already exist but they just were not aware of or do not know how to access. Beginning where people and communities are at will make your life and theirs much easier and increase the chances of sustainable development.

Existing capacity/services can include:

- **General services** – what are the main services in the community and where are they located (health services, aged care services, community, family and disability services)?
- **Community groups** – what self-help, advocacy, voluntary and social groups are there and where are they located (RSL, Senior Citizens, Red Cross, P&C)?
- **Transport services** – this is where you really need to detail what exists, when and where the service operates, how much it costs, who can access it and what the barriers are. Look for all types of transport – private and public, formal and informal – including if possible who is prepared to give people a lift. This includes spare seat capacity – who has a vehicle running on a particular route with spare seats? Check for:
 - taxi services;
 - bus services – school, local and regional;
 - QAS non-urgent patient transport services;
 - services provided for government departments such as Queensland Education and Queensland Health (often they have down-time and spare seat capacity);
 - community and aged care services;
 - volunteer services;
 - local council services; and
 - train and air services.
- **Social capital⁵** – this is usually the intangible stuff that can be difficult to measure but is essential for community capacity. It includes the following:
 - the level of volunteering in the community;
 - the willingness of agencies to collaborate;
 - the number and function of community groups and committees;
 - the number and variety of social networks and how they interrelate;
 - the level of support and inclusion of minority/fringe groups; and
 - the number of people prepared to give others a lift.

3. Community engagement – the perspective of the community and transport consumers

This important phase is about listening to the people who are closest to the transport problem. It builds on the community engagement processes explained earlier. There are several ways or methods of community engagement:

- Survey (post, interview or telephone) a 10% sample of the community or community of interest (passenger transport users and non-users). A 75% or more response rate of those surveyed is considered a good sample.

⁵“Social capital refers to the processes between people which establish networks, norms, social trust and facilitate co-ordination and co-operation for mutual benefit. These processes are also known as social fabric or glue”... Eva Cox, 1995 cited in Paul Bullen, Management Alternatives Pty Ltd. www.mapl.com.au



- Hold a public meeting/forum inviting interested community members/leaders and members of the public.
- Conduct a small focus group or focus groups of those representative of a specific group/culture or community of interest.
- Conduct a workshop to present transport-related information and then work on the transport problem, harness ideas, solutions and commence planning.
- Piggyback onto an existing group, meeting or survey to save duplication (and wasting people's time and energy).

All of these methods require specific knowledge and skills. Community engagement should be handled with great sensitivity and responsibility. Before jumping in, decide carefully which method or combination of methods you will use and consider utilising or at least consulting with an expert in community engagement processes.

On the other hand don't get too bogged down in exhaustive processes. The important thing to ask is what do you need to know from the people who are using or need to use the transport service? Use open-ended questions plus have some options for them to choose from. Also try to tap in to their ability to solve some of the problems – have faith and trust in the power of people to come up with workable, practical solutions that they ultimately will own and be more likely to utilise.

The following link has a guide on how to design and conduct transport surveys:

www.transport.nsw.gov.au/countryresource/guides/survey.html

4. Agency consultation – the perspective of service providers

If you haven't already gleaned their perspective during the community profile phase then ensure you have a method for gaining the perspective of the relevant agencies and transport operators.

This is sometimes part of the community engagement process, particularly in a small town or area. A public meeting will attract community members, consumers, service providers and operators all at once.

You also need to assess the impact of transport services on local businesses – they sometimes have concerns about transport that takes away from the local shopping area, but they can also offer some transport solutions such as sponsoring a shopping centre taxi or bus service.

Consulting with existing transport operators will take some extra sensitivity, particularly if an operator has come under attack for not offering appropriate transport. You do not want to get offside with them – if they are a commercial operator this is their livelihood and this should be respected. However, that doesn't mean they cannot be challenged to improve their service and make it more appropriate to consumer needs.

You can use the same methods listed under the community engagement – just redefine the questions you need answered. What do the providers know about transport needs and what difficulties, barriers or concerns do they have?



5. Identify the gaps in transport services or barriers to access

Finally, you will now be ready to draw some conclusions about transport need. Gather the threads, look for patterns and identify common themes. This phase can sometimes ‘get stuck’, particularly if there has been too much unwieldy data collected – how to interpret it all? Or you may be too familiar with all the data and it is hard to see the wood for the trees. A good idea is to present the data to another person or group of people, such as your transport reference group, to get their overall view.

However if you’ve conducted a tightly focused needs assessment, the needs should leap out at you. When interpreting results, try not to jump to solutions yet – keep to the problems or the issues. Many people will say, for example, that they need a bus – but a bus is a solution, not the problem, and may not be the best solution at that. However, if there have been suggested solutions along the way (and there will be) then capture them as a separate area under ‘options’ or you may have started to marry options with needs. Or you may have conducted this process more as a feasibility study on a particular option. It doesn’t matter if needs start to get ‘muddied’ with solutions – as long as you can be clear that the solution is the best response to the need.

Consider:

- **Who** is experiencing access and mobility difficulties and how many - age groups, cultural groups, transport-disadvantaged groups.
- **What** – the types of issues, challenges, barriers.
- **When** - after hours, week-ends, set days/times.
- **Where** – suburb, in town, out of town, remote areas.
- **Why** are there problems – what are the issues behind the issues?
- **What** are the solutions that have been proposed?

6. Prioritisation

Sometimes the need that ought to be dealt with first just leaps out at you. Often, though, you will have to go a process of prioritisation or ranking to decide between competing needs. This involves trying to compare the depth of each identified need (how strongly it impacts upon the individuals affected by it) with its breadth (how many people in the community have the need). The Prioritising needs matrix from Appendix 1 is intended for this purpose.

The following example shows how it works:

Benefits to Community	High	Meeting the need for group social outings benefits the community at large but the impact on individuals if not met is not acute. <i>(high/low)</i>	Helping older drivers to drive safely longer not only keeps them out of the ‘system’ but also preserves their sense of independence and dignity. <i>(high/high)</i>
	Low	Doing something about physical access to a regional bus service that has limited use because it runs at the wrong times on the wrong days doesn’t do much for anyone. <i>(low/low)</i>	Meeting the need of prisoners’ families to make prison visits does not greatly benefit the community at large but will be highly valued by family members. <i>(low/high)</i>
		Low	High

Impact on Individual



This matrix is an example of what is called a johari window (after the two academics who first came up with the approach). To interpret this matrix, remember that items that fall into the ‘high/high’ quadrant or window pane rank highest in priority, followed equally by items in the ‘high/low’ and ‘low/high’ window panes, with the ‘low/low’ window pane ranking lowest.

You also need to be conscious of the fact that the decisions that you make at this point – individual need vs group need; short-haul travel vs long-haul travel; Monday-to-Friday trips vs night-time or weekends trips – will have a fundamental impact on the costs of your transport solution/plan. This, in turn, will impact upon how much service can be provided to how many individuals/groups within any given budget.

7. Writing up your results

You can use the mapping tool at the back of this toolbox or you could write up a more formal report which may be needed for presentation to a management committee or funding body. If using a more formal process, use the following headings:

- **Introduction** – explain the purpose of the needs assessment and any relevant background information such as how it all came about.
- **Methodology** – explain the overall way the needs assessment was conducted and the specific methods used (public meeting, survey, focus group; who was interviewed, how many and so on).
- **Results** – detail the results of your inquiry. If you used a survey, then show tables of the results and your interpretation.
- **Conclusions and recommendations** – write up the conclusions you reached about unmet needs and the recommendations or suggested solutions.

A well-written report should allow the reader to reach the same conclusions and recommendations from the information presented.

It may also help to have a map of the community with the main destinations highlighted and the main transport service routes.

8. Feedback the results

This last phase is often missed and leaves people who participated in the process without any verification of their say – which is very disempowering. Part of your responsibility in conducting a needs assessment is to feedback the results – even if it’s a summary – to those from whom you gathered information. Ideally you would arrange a media release and publication or public launch of some kind.

Feedback is essential for another reason – to help give your results validity. There can be a loss of interpretation between the fact-gathering phase and the needs identified. Feeding back the results in draft form gives an opportunity to correct any misinterpretation and also add in anything that may have been overlooked or updated if the needs assessment has been a drawn-out process. You may need to arrange a second feedback session if a lot of changes are needed.

Finally, assessing needs is not a one-off, ‘once and for all’ activity. Needs change over time and it is good practice to periodically take a scan of the ongoing needs of your community just to make sure your transport plan is still on track.

For further information on conducting needs assessment go the following websites:

www.communitybuilders.nsw.gov.au/getting_started/

www.transport.nsw.gov.au/countryresource/guides/regional-transport-profile-template.doc

www.transport.nsw.gov.au/countryresource/guides/plan-step-by-step.html



Matching needs with solutions

Matching of needs or problems with options or solutions is a matter of identifying the appropriate response and most importantly its feasibility and workability. Because of the array of problems and with each community being so different, there cannot necessarily be a prescriptive fix to any particular problem. Often it is a case of pulling all the right pieces together to complete the jigsaw.

Additionally, options perceived to have barriers may need to have that perception challenged. Then there is always the potential for there to be options that have not yet been thought of and you might be the first to do so. In other words, factor in creative, innovative responses to access and mobility difficulties.

The CBT Guidelines, are an especially useful reference source at this point. The community transport section in particular, describes a number of very good examples of actual, on-the-ground responses/solutions of differing size and complexity from around Australia.

Whatever the problem or issue you've identified, though, it's best to start with small workable solutions that build on what is already there. Use the following prompts to promote thinking outside the square:

- Think access and mobility – not transport.
- Think passenger transport – not public transport.
- Think existing resources/vehicles before adding anything extra to the mix.
- Think new vehicle(s) only when there is no other option.

Another way of framing this is to think on a continuum of least invasive and authority-controlling solutions through to most invasive and authority-controlling (and therefore usually most expensive) solutions. Start where possible with the least invasive solutions.



The following solutions or options go from least invasive to most invasive. They are briefly described and their main benefits and disadvantages or barriers are given.

Finally, remember that it is unlikely that any one solution will be able to satisfy all the unmet needs.

Social networks

Encourage informal social networks such as family, friends, church and neighbours to offer people with transport difficulties a lift. Several surveys show that this is the way most transport-disadvantaged people get to where they need to go anyway. This form of social capital contributes significantly to transport solutions. It is also the least complicated, cheapest and most appropriate form of 'community transport'.

It utilises existing social networks – usually based on reciprocity (if John gives Mary a lift to town, she'll shout him lunch in return). Because the driver and the passenger know each



other, there is usually trust and mutual concern and therefore each would respect each other's rights and needs. As it is a private arrangement there is no interference or approval required from any authority or insurance company.

There is a spin-off from this solution that all communities should be factoring into any service design and development. People need to be needed – it is an essential part of our sense of wellbeing. Giving someone a lift is a simple act of generosity that most people can easily fulfil. It also allows opportunity for social interaction – another of our essential needs for wellbeing.

So, encouraging the use of social networks contributes to other positive elements. We should be very aware of not taking away from this by replacing naturally-occurring networks with artificially-created paid services.

Of course, not everyone has access to social networks, or they do but it is limited, or there are times when their social networks can't provide or just need some respite. That is when services come into play.

Here are some ideas for encouraging social networks:

- Place an article in the local newspaper or a newsletter.
- Have using informal transport as a first-step strategy for individuals who seek transport – sometimes they just don't want to bother their family or neighbour, when their family or neighbour is actually quite willing.
- Ask local churches or other local groups if they would offer a lift to their fellow parishioners/members.
- Get community workers in the area to suggest offering lifts/car pooling/shared rides when introducing/arranging social-based activities such as playgroups.

Car pooling

Car pooling is a more organised way of utilising social networks. It usually involves several people in the one vehicle, usually all going to the one destination. It can be a regular run to work, education or training facility or more often than not carting a load of kids to a sporting match.

The social networks this time are usually less personal and at times the driver won't actually know who they are transporting – particularly in the case of a car full of kids! Therefore there can be some issues around sharing in the cost of the trip and also the uncertainty and security of people not knowing or understanding the needs of either the driver or the passengers.

Car pooling requires good communication and clear boundaries. It is better if there is some kind of sharing of cost – even if it means taking it in turns to provide the vehicle and driver.

There is another form of car pooling that is even more organised. It involves:

- Having a central place to book where people who are willing to drive can place their names down for planned trips.
- Those needing a lift can then register their names against the planned trips.
- Again, the cost of the trip (petrol; wear and tear) needs to be shared. Those willing to drive should not charge for their time since that can breach the relevant transport regulations and raise personal income tax issues.

The central booking place can be a post office, store or pub and the arrangement could be promoted in the local paper or newsletter.



This approach usually suits only small communities where people know each other fairly well and can readily trust who they are travelling with – remember issues of personal safety and advise people to meet the person before they share a ride together. Or it could suit a housing estate area or independent living unit/retirement village complexes.

There may be some vehicle insurance issues for both sorts of car pooling. However, if the trips are irregular or occasional, there should not be a problem.

Non-transport solutions

Often some of the access and mobility concerns can be solved by non-transport means. The following may be easy solutions to deliver and help overall to reduce transport difficulty:

- **Walking tracks and bicycle tracks** – having paths and tracks that are more accessible, safe and secure can allow more people to walk or bike their way around.
- **Accessible kerbs, gutters and shopfronts** – a built environment that is accessible to wheelchairs and prams also improves people's ability to negotiate getting around independently.
- **Electric scooters and electric wheelchairs** – frail aged people and persons with a disability able to use these mobility aids can have their whole world open up with possibility (providing the built environment is accessible). This is a great way for them to get around their local area and most wheelchair-accessible taxis can accommodate them (except scooters), as do low-floor buses.
- **Home delivery services** – from groceries to mobile library services, there is now an array of home delivery. In most country towns, such services are also free of charge to elderly or disabled clientele.
- **Internet and phone banking, bill-paying and shopping** – as people become more familiar with the technology and security improves and can be trusted, this can be an alternative to tripping down to the shops just to pay the bills.

A note of caution – reducing the need to go out of the house is not always a good thing. You need to bear in mind people's need to socially interact, even if it's just a regular cheery hello from the local newsagent. On the other hand, for some it reduces a huge load and stress surrounding outings if services can come to the home – carers of people with dementia, as one example.

- **Bringing services to local areas** – a major transport need in rural areas is getting to specialist medical or allied health appointments in larger centres or cities that are often a day's drive or more away. This often involves staying overnight. Enticing health professionals and medical specialists to visit rural and remote areas, albeit a challenge, is one way of reducing this need. Telehealth via video and teleconferencing facilities is another option that is becoming more available, although its use is still limited and uptake by consumers and medical professionals is slow. Face-to-face consultation or treatment is often preferred.
- **Transport information and coordination** – often there are lots of transport options but people either do not know about them or they are uncoordinated. This can result in duplication of services and waste of scarce resources. Some agencies just do coordination and booking of transport but do not actually provide transport themselves. Even developing a simple guide that explains all the transport options in your area can be a boon to people who are transport-disadvantaged. An excellent example is the Transport Options and Access Guide 2004 produced for Brisbane residents by the Queensland Council of Social Service Inc (QCROSS) and St John Ambulance.



- **Driver education and training** – RACQ provide information sessions for older drivers to revise and learn new road rules, helping to keep them on the road for longer. There are also various other driver training courses available for younger drivers or community bus drivers who are responsible for driving groups of school children, sporting groups, seniors groups or community groups.
- **Equipment and vehicle modification to aid mobility** – there are several services that provide equipment to aid mobility such as wheelchairs, scooters, walkers or to aid getting in and out of a vehicle. There are also services that can make modifications to vehicles to make them more accessible.

Transport solutions

Finally, there are the many types of public and community transport services that are available across various parts of Queensland. In metropolitan areas, there are usually a number of options available; in rural and remote areas, there may be no public transport options at all.

Social and recreational club transport

Some clubs offer courtesy transport for their members or patrons, usually to get to and from their club, match or social event. The club usually owns and runs its own vehicle and provides a driver. Often the vehicle is a mini-bus or people-mover of some kind. Sometimes they will 'loan' out their vehicle for other groups to use under certain conditions.

Community transport services

Community transport services have grown in communities throughout the state as a response to unmet transport needs. Usually they are funded or part-funded by the Home and Community Care (HACC) Program that provides services for the frail aged and younger disabled persons at risk of premature institutionalisation and their carers. The services vary depending on where they are located and which agency operates them. Many communities do not have community transport services at all.

Most community transport services have a paid coordinator with volunteer drivers in agency cars (again, often HACC-funded) and provide transport for HACC-eligible people for medical, social and shopping reasons. Because of the reliance on volunteers combined with service delivery that is personalised, secure, flexible and affordable, these services can struggle to keep up with high demand.

There is much variance in the interpretation and the setting of criteria for eligibility for use of community transport services. Although HACC has quite clear criteria for those who need to use their services, this is often misunderstood at a local service delivery level.

Another problem arises when there are other transport-disadvantaged people living in the same area with the same unmet transport difficulty need who do not have access to an equivalent transport service. This can create a division in the community when one group has access over another group with equal need.

There are, however, moves to correct this situation with HACC funding now linked to demonstration of a collaboration or partnership with other agencies or funding bodies that pools resources and offers a range of transport responses to a range of people. See the section on Partnerships and pooled funding for further details on this point.

A general rule of thumb is that, where there is spare seat capacity in a vehicle, it can be offered



to other members of the transport-disadvantaged public, as long as it does not disadvantage people who are HACC-eligible for the subsidised service. This would include having to pay a full fare or user contribution towards the cost of the trip and the coordination of the service.

Taxi services

Taxis offer an immediate and individual response to transport need. However, because of this, the cost often makes the use of taxis on a regular basis prohibitive for the transport-disadvantaged. Taxi services can be a great solution if fares can be subsidised (see Appendix 2) and the service made appropriate and safe for different groups (for example, having the car door opened for the frail aged and their groceries brought to the back door). Wheelchair-accessible taxis are becoming increasingly available, even in regional and rural communities, and are often offered as a separate service with drivers who are trained in disability needs.

Some community transport services, church-based agencies or service clubs will sponsor taxi vouchers for the transport-disadvantaged. Even a few dollars off each one-way fare can make the difference.

Because the transport-disadvantaged often have predictable trips away from peak periods and are not as pushed for time as commuters, it is possible to develop a cost effective service using taxis. For example, a scheduled or time-tabled, shared ride taxi service can cut down substantially the cost of the fare for individuals travelling together to the same or similar destination. This could be a group of 3 people in a regular cab or up to 10 in a maxi taxi. Depending on the number of passengers and the fares charged, the cost of the cab can sometimes be recovered from the fares alone. Typically, though, some level of operating subsidy will still be required. Most taxi companies and operators are open to developing up these ideas – it is worth negotiating with them to offer a range of taxi service options or if they are a small operator they may just need a hand getting it started.

Brisbane City Council provide a subsidised pre-booked taxi service called Council Cabs that uses Yellow Cabs to provide transport for seniors to get to and from shopping centres on set days of the week. If eligible people have language difficulties in accessing this service then the council can assist with a translating and interpreting service. The ‘medical runs’ operated by the Transport Options Project (TOPS) in the southern suburbs of Brisbane are an excellent example of a HACC-funded scheduled, shared ride taxi service.

Not all rural and remote areas have taxis because they are not considered viable. However, border-line viability can be made viable with some innovation and increased use of taxi services in country towns. Outsourcing health and aged care-related transport to the local taxi service helps to keep an essential service for all the community. There is also some flexibility around taxi licences to accommodate this need to rural areas.

Local bus services

Most local buses operate on a fixed route and at set times. However, they are readily affordable. The majority of metropolitan bus services have a proportion of accessible, low floor buses in their fleet that accommodate wheelchairs and prams. These buses can be arranged in advance if the bus operator is notified. Even in regional communities where local bus services are provided under contract to Queensland Transport (QT), all new/replacement buses now have to be accessible.

Many local bus services operate on a hail and ride basis, allowing the bus to be hailed at any point along the route rather than only at designated bus stops. Other examples of more flexible bus services include services where the bus will deviate from their route on demand



and pre-booked services that go door to door. Like taxi operators, bus operators need to be made aware of people's needs and negotiated with to offer more flexible and appropriate services.

Again, in rural and remote areas there is often no form of public transport other than school transport. However, school bus operators can offer transport to the public if there are spare seats and they take out additional third party insurance. Several school bus operators in rural areas offer flexible transport to the community in between school transport hours or on weekends.

Also like taxi services, bus services are run by commercial operators and need to be viable in rural areas. Some local councils are taking up the challenge of providing public transport.

Regional bus services

These services are integral in rural, remote and regional areas. They link towns and provide a link to larger metropolitan areas. The fares are comparable to paying for fuel in your own car and there are some subsidies or rebates available (Appendix 2).

However, they are on fixed routes at fixed times and may be only a weekly (or less) service. They may bypass towns off-route, have drop-off and pick-up points on isolated junctions of the road or at times of the day not conducive to use, like in the middle of the night. They also have high steps to negotiate – a barrier for people with a significant physical disability or general frailty.

Sometimes a large coach-style bus in more isolated areas is not fully utilised. A smaller vehicle could make better economic sense and could be used more flexibly, operating only on days and at times that people need.

Aged and community care services

Aged and community care services are increasing significantly with the ageing population and the incentives for people to stay living in the community longer. With this come transport services that accommodate the particular personal care needs of clients and give access to and from their services. The HACC Program administered through Queensland Health is the main funder of community care services. The Commonwealth Government also provides funding for higher-need groups, as do Disability Services Queensland (DSQ), Department of Veterans Affairs (DVA) and other funding bodies.

Most aged and community care services, including their transport-specific services, are delivered by not-for-profit agencies such as Blue Care, Ozcare, Anglicare or local neighbourhood centres or local councils. The transport service is usually part of another care service and restricted to those who meet certain criteria such as being frail elderly or having a significant disability.

An example is transport to and from respite centres that not only pick and drop off clients and their carers door to door but also offer day outings and sometimes trips away. These services are often delivered in buses which have capacity to be used in their downtime for other local transport needs.

Aged care residential facilities also often have their own bus or vehicle that is used for group outings, shopping trips and the like.



Hospital patient transport services

Hospitals generate a lot of transport need. Often people have regular appointments that require specialist care at a particular hospital or medical facility that is a long way from where they live. Or people get ‘stuck’ in hospital with no way home – they could be brought in during an emergency by the QAS but once recovered they are without the family support or personal funds to get home.

Queensland Health has recently conducted a review of health-related transport within its facilities. Health Transport Reference Groups are being established at the Health District level across the state with improved coordination of transport services within this sector as the ultimate goal.

QAS non-urgent patient transport services

QAS provides non-urgent patient transport services to hospitals and other medical facilities for people who meet certain eligibility criteria and have been authorised by a registered medical practitioner. Eligibility is limited to people who need stretcher transport, active management or monitoring in transit or whose disability, behaviour or condition is such that it would be inappropriate for them to travel on more public forms of transport.

QAS often get requests to transport people who do not really fit the criteria. There needs to be caution used in expecting QAS to transport people just because there is no other form of transport available or because people think that, since they now pay the Community Ambulance Cover levy through their electricity bill, they have a right to use the service for any health-related transport need. In rural areas, taking the only ambulance in town away for the day can leave towns without an immediate ambulance response. Also, the cost involved in utilising QAS for routine transport can be unjustifiable.

QAS are now outsourcing some of their non-urgent patient transports to other transport providers such as community transport operators.

Train, ferry and air services

These passenger transport services are available only in certain areas for obvious reasons, and are part of a broader-scale transport system. However, where they are available, it is worth checking out how accessible they are, perhaps promoting the advantages of using these services, exploring subsidies that make them affordable and having input into improving scheduling, booking and so on.

Air services in rural and remote areas can make a huge difference to the tyranny of distance, offering a very safe, comfortable and quick way to get to larger centres without the need for overnight stays. Although air travel may seem out of the price range for most people, it is worth exploring the feasibility of this option in these areas.

Brokered or contracted transport related services

It is possible to broker or contract services if you are not equipped with all the elements required to provide a service in your own right. There are two ways of looking at brokerage/contracts depending on your vantage point. Brokering out is having the funds but not the service infrastructure, vehicle and driver. Brokering in is having the service infrastructure, vehicle or driver but not the funding. Therefore brokerage is usually about a reciprocal



arrangement where both parties gain. However, such arrangements usually require skilled negotiation to develop and maintain if they are to be long-standing (negotiation processes are discussed further in the section Implementation - from planning to action).⁶

Prioritising the options/solutions

Having come up with a list of potential options/solutions that match the identified need/s, the final task is to prioritise them. If you only have the one potential option at this point, then perhaps you need have another think about how else the need/s might be met (considering all the options outlined above).

When it comes to prioritising or ranking options, one approach is to identify the strengths and weaknesses of each option, as illustrated below. A blank template of this matrix has been provided in Appendix 1.

Option/solution	Strengths	Weaknesses
<p>Multi-ride Taxi Service Either the bus companies or taxi companies could offer a pre-booked personalised service to small groups for regular outings/trips/ shopping</p>	<ul style="list-style-type: none"> • Pre-booked gives assurance to the commercial operator of a fare (that is no bookings, no trip) • Suits groups with predictable transport needs and need some personal assistance such as weekly shopping trips for elderly groups • Can be a social outing as a group • The shared fare makes it a reasonable amount for the individual 	<ul style="list-style-type: none"> • Needs a booking service • Needs a regular group who will use it each week
<p>School Bus Operators A pre-booked bus run once/ twice per week in between school times for the public, particularly those living in the out of town/rural areas.</p>	<ul style="list-style-type: none"> • Utilises existing transport operator which helps to keep them viable • Reasonable fares • A pre-booked run once/twice week reduces dead running time. • Responsibility for insurance, vehicle replacement, servicing and driver worn by bus operator 	<ul style="list-style-type: none"> • May not be able to cover all areas or roads • Not wheel-chair accessible and steps are high • School bus operators may need to upgrade their CTP insurance + pay Queensland Transport (QT) a fee for a non-school bus run, if they haven't already got endorsement to do so.
<p>Scooters The town council or chamber of commerce or shopping centre(s) could hire out or offer free scooters for people to move around the shopping areas.</p>	<ul style="list-style-type: none"> • Gives shopping independence to people with limited mobility • Increases the shopping power of people with limited mobility • Cheaper alternative to transport 	<ul style="list-style-type: none"> • Do not suit all people with mobility problems • Would require someone to monitor, hire out and maintain scooters and consider safety factors and so on

⁶ The terms brokerage and contracted can be interchanged – some organisations such as insurance companies are wary of the term brokerage as it means something different to them.



A second approach is to assess the potential impact or benefit of each option against how quickly/easily it can be implemented. The Prioritising options/solutions matrix from Appendix 1 can be used for this purpose, as below.

You could also measure each option against the Options/ solutions best practice checklist (also provided in Appendix 1) at this point.

Implementation timeframe/ opportunity	Short-term	<p>Providing information on existing transport options may have low impact, but can be done straight away via media, service directories and the like.</p> <p style="text-align: center;"><i>(high/low)</i></p>	<p>Providing appropriate transport for people on renal dialysis using spare capacity in the local taxi service meets an urgent individual need and is relatively easy to set up.</p> <p style="text-align: center;"><i>(high/high)</i></p>
	Long-term	<p>Providing weekend services would meet a low demand and would be a long-term option when further funds become available.</p> <p style="text-align: center;"><i>(low/low)</i></p>	<p>Advocating for a more accessible built environment/local transport services for people with a disability is a long-term/high impact option.</p> <p style="text-align: center;"><i>(low/high)</i></p>
		Low	High

Impact on transport-disadvantage

Sometimes, getting some quick runs on the board through opting for a low impact solution that can be put in place relatively easily and without too much delay, like an access guide, can be the best option. Bear in mind, once again, that a ‘high/high’ ranking is best and ‘low/low’ worst.

Having narrowed things down to your preferred option/s, you should run it against the previously mentioned best practice checklist if you have not already done so. This list provides a scan of the values, principles, practical considerations and compliance requirements consistent with best practice. The more your option/solution meets this checklist, the more likely it will be a success.

Finally, ask yourself this one last question about the proposed option/solution – “Does it do the most, for the most people (while still meeting the identified need/s and given the available resources)?”



Implementation – from planning to action

This section looks at some of the specific skills, knowledge, resources and support you may need to implement your transport development strategy – from planning to action.

It is beneficial to place your transport proposal/plan/options into a model of practice to have a complete picture of what is involved. This avoids a splintered or ‘scatter gun’ approach which can duplicate, leave gaps or risk wasting precious resources. In addition, it helps to clearly define your service/program, define the boundaries and help create smoother transition from one service to another for consumers.

Organisational/service delivery models

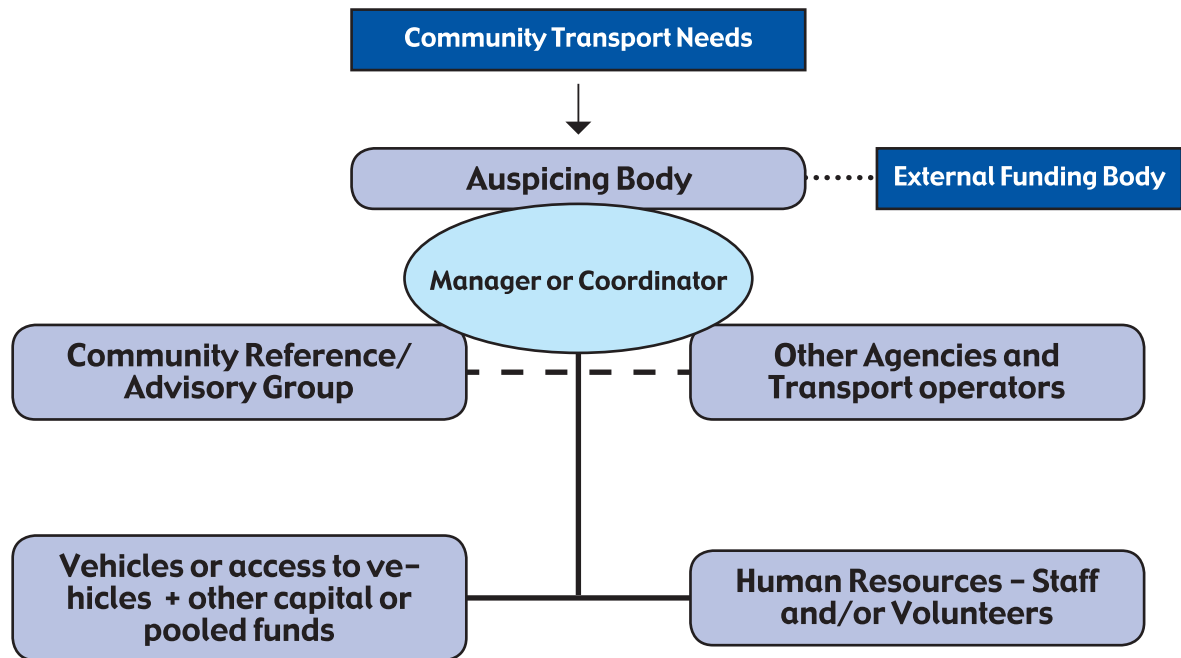
There are organisational models, service models, and network models – all of which have varied elements depending on the underlying values, beliefs, environment and practices of the organisation, agency or group. Working developmentally, a model of practice should evolve from the process of working with the community to define the issues and developing the resulting options to improve the issue(s) affecting the community. Therefore, there is not necessarily a ‘one size fits all’ model.

Also keep in mind that how models are implemented by the particular auspicing body or agency is integral to the outcome. The culture of each agency will impact on the model authenticity and what may work beautifully for one agency may not necessarily work so well for another if a different set of values, principles and rules are applied.

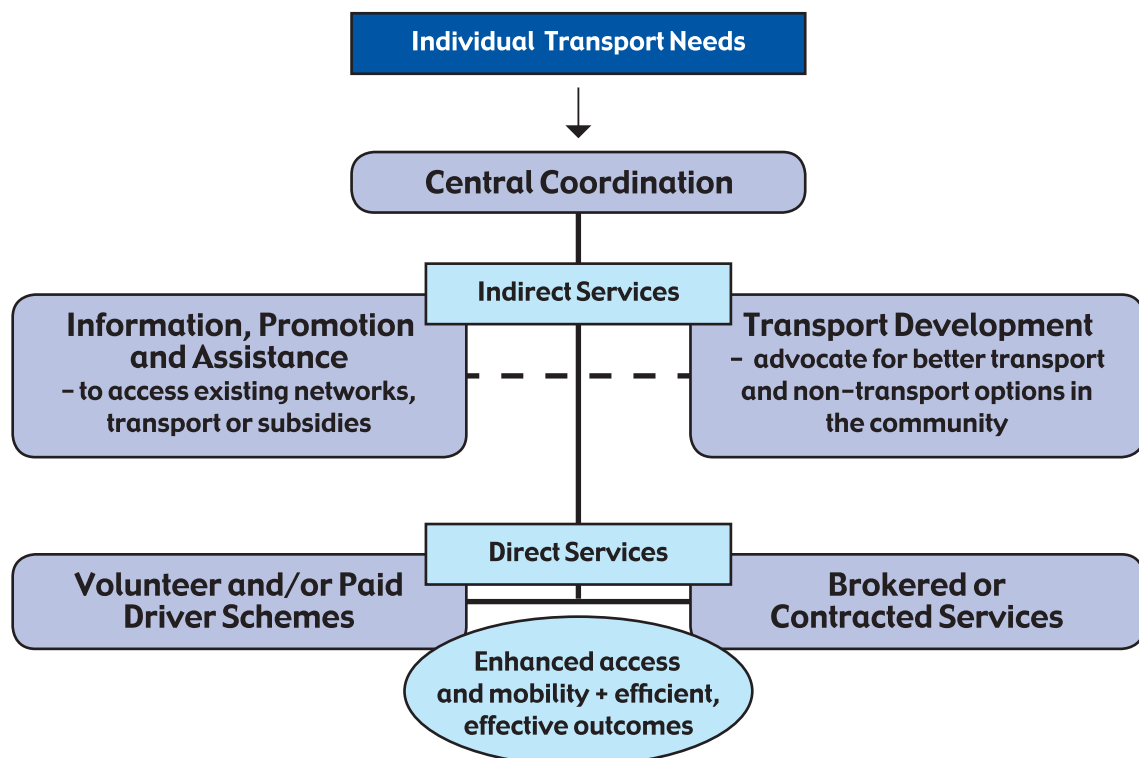
However, there are broad elements of a model that can relate to most community-based projects or services. Models are often best demonstrated through visual illustration. The following diagrams present elements that might make up a community transport model. You might need to develop the whole model or just one or two elements that link into an existing model. For example, if the local council is to auspice the transport proposal, then it needs to fit into an existing council model or framework – without compromising the elements that make up a good transport service model.



Organisational Model:



Service Delivery Model:





A business proposal framework

When developing a transport strategy or plan, a business proposal can be useful, particularly if you need to present a written proposal for funding. A business case usually follows a step-by-step approach that looks something like this:

- Gather all the information as described above in the section Identifying needs.
- Define the issue – ask “What are the needs?”
- Place this information in the context of any broader transport planning documents and policies.
- Identify the expected outcomes of the strategy/plan – what do you hope to achieve?
- Who will benefit from the strategy or plan?
- What are the specific objectives of the strategy or plan?
- What are the strategies – what will be done?
- How will it be measured? What are the indicators of success?
- What are the costs involved? What funding source or cost recovery is proposed?
- What other resources are needed?
- What will be the impact on local businesses and commercial operators (if applicable)
- What is the timeline?

You may also need to identify who will manage the plan – the sponsoring or auspicing organisation – and the role of each agency, if applicable.

This process is useful for developing an operational plan when you are ready to implement. It also helps for evaluation purposes which require clearly defined goals and objectives (see the section on Assessing success).

More details on how to write business plans for transport can be obtained from:

Sciens Consulting for the Office for the Status of Women
A Step by Step Guide to establishing a Rural Community Passenger Network, Passenger Transport Board, South Australia, 1998; or

The NSW Ministry of Transport Country Transport Resource Kit
www.transport.nsw.gov.au/countryresource/guides/plan.html ; or

The NSW Government, Community Builders website,
www.communitybuilders.nsw.gov.au/

Costing and funding framework

Choosing options and developing proposals and plans is one thing, costing them out and getting them funded can be another thing entirely!

The first step is to establish some accurate costings. It may be that the amount of funds has been predetermined and this cannot be altered. In this case you may need to work backwards – determine what options you can afford to purchase before you decide on your overall plan/proposal.

However, most times there will be an upper limit of funds you can apply for. Work out the costs, trim your proposal to fit under the upper limit of funding. Or stagger the implementation of your proposal with levels or stages that can be funded separately.

The following are the main type of costs that will be incurred in developing up a community transport service. Please note that the cost of setting up an organisation has not been included here, although a management fee has been factored in. You should also note that the rates and percentages provided are estimates only, based on information available at the time



of writing. Please do your own investigations to determine more up-to-date and accurate costings.

Cost components	Costing percentage or rate (estimates only)	
	One-off, capital or non-operating	Recurrent or operating cost
Management or auspice fee – covers infrastructure costs which include accounting fees, payroll, insurance and so on but may also include rent, electricity, depreciation, repairs, IT systems and support, and administration. Administration may be a separate expense covering telephone, office supplies, cleaning and the like		~ 10% – 30% of total expenditure Admin as separate can be ~ 20%
Needs assessment – treat as separate project conducted by someone off-line or a contracted expert (if contracting-out at least triple staff wages rate). Extent of the project will vary – the estimate provided is for an average rural community.	Approx 100–150 hrs staggered over few months to allow survey returns/data collection	Allow about 5% of budget on project monitoring and evaluation
Community reference group/agency collaboration – allow for expenses associated with this activity, for example catering, travel, phone, parking or a flat meeting fee (for reference group members who are volunteers and do not have their expenses met by an agency).		~ \$10–20/head for catering ~ 30–60c/km travel or ~\$20–50/meeting ⁷
Staff wages and training – this will depend on the employee's level of expertise and their remuneration. The rate given is an average community transport coordinator level.	Allow about 1–2hrs coordination per trip	~ \$20–30/hr + on-costs ⁸ @ ~ 30% = \$28/hr
Volunteer expenses – factor in expenses incurred while on the job namely meals, travel in their own car, training		~30–60c/km travel ~\$10–\$20/meal Training @ 2.5%
Vehicle expenses – this will depend on whether vehicles are purchased, leased or brokered and the type of vehicle. Also factor in a vehicle or travel expenses for the coordinator and staff. Vehicle costs can also include interest rates on finance – not included here as it is assumed that the vehicle would be funded. If not, then add approx 15c/km.	Purchased new: av. sedan ~ \$25,000–\$30,000 20 seater bus ~ \$80,000 + \$30,000 for w/chair hoist	Running costs ⁹ : ~ 15c/km Standard costs ¹⁰ : ~ 35c/km Total: ~50c/km for av. medium sedan Double for a bus
Other capital expenses – there may be need for computer, printer, data collection/booking programs, photocopier, phone system, mobile phones, mobility aids	This will depend on what's needed Allow about \$5000	Or if leasing allow a similar amount each year
Funding or Brokerage Pool – this allows services to be brokered in or out as required.	Allow a c/km basis + admin time	As for vehicle costs ¹⁰

⁷ This will depend on the distance members have to travel.

⁸ On-costs include: annual leave 4 weeks; loading 17.5% over 4 weeks; Workcover 0.22%; superannuation 9%; long service leave 1.9%; training 2.5%.

⁹ RACQ, Facts on Private Vehicle Expenses, May 2005 edition. Running costs include fuel, tyres, service and repairs. Standard costs include registration, insurance, licence and RACQ membership.

¹⁰ Costs cited are for private vehicle – an agency vehicle can be up to 20c/km cheaper to run with higher turnover, lower depreciation and corporate deals on standard costs.



Funding sources specifically for transport development are currently very limited, particularly for recurrent funding. A list of funding sources is given at the back of this document. However, before resorting to just government and non-government grants, think of other ways that costs can be met or offset.

Fees and fares

Some cost recovery can be obtained through charging fees and fares. Bona fide community transport services are allowed to charge fares and it is good practice to do so as long as a degree of reasonableness is exercised – for example, capped fares. If you are developing transport options for people who are transport-disadvantaged, they are also often financially disadvantaged. Where expensive fares can't be recouped through a subsidy or rebate, consideration should be given to setting fares at a nominal level. There can be a flat fare for certain trips or a cost per kilometre based on the vehicle running and/or standard costs as outlined in the costing table above.

There can be some tension, however, around offering transport totally for free since this sets groups apart from each other in a significant way and can create inequity. The values, beliefs and practices of the agency that auspices the service will probably determine if there is to be fare setting and the degree of it. Church organisations tend to have either no fees or nominal fees, with a policy that no one should be denied a service on the basis of their ability to pay. One way of actioning this policy is to set a fare but if there is doubt about a person's ability to pay to ask for a donation or that they pay what they can.

Memberships

Charging prospective passengers an up-front 'membership' fee is another way to recover the costs of a service. However, for transport-disadvantaged people this would need to be set at a nominal rate and they would need to require transport on a regular or semi-regular basis to gain the benefit of the membership. There would also need to be sufficient membership numbers within a stable population for this approach to be viable. Even so, this scheme is used to fund or supplement some community transport services. It can be beneficial for those who are not eligible for other funding or subsidies such as the non-HACC group.

Brokerage

Brokering in funds from an agency that has funding allocated for individuals who experience transport-disadvantage can be another option. For example, Commonwealth Carer Respite can offer funds for carers who need a break – this can sometimes mean a carer or their loved one needing transport. The funds will pay for the cost of the transport and may include some funding towards the coordination or administration of the transport arrangement.

Partnerships or pooled funding

When two or more agencies combine their resources to provide a service, the cost savings and combined funds can be significant with potential to provide a comprehensive service with less duplication and greater efficiency. Many government agencies are now promoting partnerships and collaborative funding arrangements.

Firstly, agencies need to have a relationship that is based on similar values, mutual trust and



a shared vision and commitment to manage the sometimes fragile interagency dynamics, barriers and conflicts of interest that exist. Even though agencies can share the development of a proposal, at the end of the day only one agency can apply for the funds and be accountable for their expenditure. Even pooled funds require one agency to actually provide the service. This means there will always be an imbalance of power and control which takes effort and skill to manage. Agencies are naturally territorial and this can not be ignored – it requires respect and acknowledgement.

Developing partnerships takes time, patience and lots of relationship building, high-level communication and negotiation skills. When it works it is a wonderful thing (a bit like any good solid relationship!) and it is worth the perseverance. But just be mindful of the risks and extra efforts required. It may even require a highly skilled third party to bring agencies together to negotiate.

Agency auspice

If the community transport proposal is being auspiced by another agency, they may agree to cover the wages of the coordinator if the vehicle costs can be offset or vice versa – they may pay the vehicle costs but not the coordinator's wages. An auspicating agency may also agree to waive any management or administrative fees.

Volunteers

Volunteering, of course, makes community transport affordable and therefore feasible. Volunteer drivers contribute enormous amounts of their own time, saving the cost of wages for driving. Mostly, volunteers use agency vehicles which is a lower risk option but sometimes volunteers use their own vehicles. This option requires checking of comprehensive insurance cover, up-to-date vehicle registration and vehicle roadworthiness. Insurance companies also need to be aware of the vehicles' additional use. Volunteers are then compensated for the use of their vehicles, usually with a per kilometre reimbursement.

Sometimes coordinators can also be volunteers, particularly if it is small community that requires only a few hours a week. This can be very simple to set up and can make the difference between having a service and not having one. A word of caution, though – if the role increases in hours or complexity it can become burdensome for a volunteer and funds should be sought for a paid coordinator.

While some communities are experiencing difficulty sourcing volunteers, in other communities there is a resurgence happening. Volunteering is one of those wonderful elements that make up healthy communities, increasing capacity to solve their social problems. Every community should encourage it and seek to make volunteering opportunities available.

There are now some great resources to support volunteering. Among them is Volunteering Australia, which has an excellent website with lots of information, links, guidelines and support for recruiting, selecting and managing volunteers. www.volunteeringaustralia.org

Fundraising

Fundraising is often part and parcel of not-for-profit, non-government agencies which provide services. Most have their tried and true methods and rely on a certain amount each year to continue services. The capacity to fund-raise in a local community will depend not only on the fundraising ability of the agency but also the willingness and ability of the community to



contribute. Some poor rural or semi-urban communities have very limited ability and cannot be relied upon year after year. However, other communities with greater capacity can provide significant funds to local agencies, either supplementing or solely funding their services.

The following website provides a free guide to assist communities in fundraising issues:

www.propopuli.com.au

Ongoing community participation

Once you have set up the transport service or program or set of strategies, hopefully with your community on board, it is important to keep the momentum of their involvement going. Often at the end of a development and implementation phase, people lose their energy and motivation. Allow for this and factor in a break. But if at all possible try to encourage the community to stay connected and involved. Presuming your community participation has been in the structure of a reference or advisory group, help them to see the value in their continued role as a guiding hand and 'doorway' to the people who will be affected by the service/program.

Community management committee

It may be that the community group overseeing the transport proposal has now in fact taken on the management of the service. In that case the group will now have a management role and be responsible and accountable for any financial transactions as well as any volunteer and staff recruitment, selection and management. They will also have public liability, insurance, workplace health and safety and many other responsibilities.

They will either need to become incorporated under the *Associations Incorporation Act 1981* administered by the Office of Fair Trading, or be auspiced or sponsored by an already incorporated organisation (a neighbourhood centre, for example), a local council or a government agency (such as Queensland Health) or a not-for-profit church organisation (Blue Care, Anglicare, Ozcare or St Vincent de Paul).

For further information on management of community committees and incorporation issues:

www.fairtrading.qld.gov.au

Community reference or advisory group

A reference or advisory group usually has no management function, is not responsible for any funding and does not have to be incorporated. Therefore, there are no formal processes that they must meet. However, it is advisable that the group be auspiced by an agency so that public liability is covered and any expense claims can be readily dealt with.

To maintain groups such as a reference group, keep in mind the tips identified in the section on Community participation. The following suggestions will help as well.

Firstly, have some formal processes to give your group structure, stability and predictability such as:

- **Terms of reference** – outline the group's purpose, role or objectives, membership, meeting processes and conflict resolution processes.
- **Chairperson and note taker** – consider regularly rotating these roles.
- **Minutes and an agenda** that are distributed beforehand.



- **Regular meetings** – no less than two months apart or the group can lose energy.
- **A process for electing representatives** – does not have to be an Annual General Meeting process. One process is that the group nominates agencies and consumer groups that they would like to have represented and then in turn ask the agency or group to nominate an individual to the representative. It is then up to the agency or group to find a replacement as individuals leave.
- **A process for input and evaluation** – don't just rely on members to bring issues up. Offer feedback forms, brainstorming sessions or other participatory techniques like pinboarding. These are explained in the resource cited in the section on Assessing success.
- **Reimbursement of out-of-pocket expenses** – if members' travel, phone or other costs are not met by their agencies or groups, then offer some reimbursement, particularly for those who need to travel significant distances to attend meetings.

Next, have some informal processes that help to keep the group motivated and committed like:

- **Celebrations** – of milestones or anniversaries or achievements.
- **Rewards** – nominate individuals who do outstanding work or offer the entire group a reward or gift each year, for example at Christmas.
- **Food** – people feel welcome and nurtured when good food is offered at meetings.
- **Fun and laughter** – have some lighter moments at meetings.
- **A social aspect to the group** – occasionally go out together for a meal or show.

Show that you value the skills and expertise of the group members by investing in their training and personal development. Include them in any relevant staff training or offer them their own training days. All reference groups benefit from increased knowledge.

Finally, demonstrate that you value the ideas, suggestions and guidance of the group. You may not always be able to act on them but listen and give any explanations of why not.

Insurance issues

Insurance issues are often put up as a barrier to transport development – particularly with proposals that involve sharing a vehicle or driving a vehicle that belongs to someone else.

Remember that insurance is just a financial protection to cover the cost of damages. Yes, the cost of damages could be huge but most insurance relating to transport is not a legal requirement (compulsory third party is the exception and is explained below) and cannot prevent you from doing something. The reason insurance is cited as a reason for an agency not allowing their vehicle to be driven or used by another agency or person is because of a policy they have decided to enforce that minimises the insurance risk. That policy could be challenged with both the agency and the insurance company, if steps are put into place to utilise the vehicle with the minimum of risk.

Of course, if the incident that causes damages is proven to be a negligent act, then the insurance company won't cover the costs anyway (again, compulsory third party insurance is different – it protects when there is fault). The key is in risk management – understanding the risks and taking reasonable steps to prevent injury or damage and therefore payouts.

The main types of insurance that need to be understood are:

- organisational insurance;
- volunteer insurance; and
- vehicle insurance.



Organisational insurance

Each organisation or agency should have its own insurance for public liability and professional indemnity. However, some large organisations wear the risk and pay out from their own revenue when things go awry.

Public liability covers such incidents as a client of the transport service sustaining an injury on the premises of the service. Professional indemnity covers staff and committee members for providing advice or assistance that may turn out badly.

Volunteer insurance

Volunteers can have medical expenses and loss of income if they get injured in the workplace. This needs to be insured against. Employees, on the other hand, are covered by Workcover.

Vehicle insurance

There are two types of vehicle insurance:

- compulsory third party insurance (CTP); and
- comprehensive vehicle insurance.

CTP is a form of liability insurance protection for drivers and owners of motor vehicles, providing cover against claims for personal injury suffered as a result of a vehicle accident. The cover is very broad, in that it covers all drivers or owners of vehicles against claims for liability. There are no restrictions on CTP, therefore, in relation to the sharing of vehicles between agencies and groups.

Comprehensive vehicle insurance, on the other hand, covers any damage to the vehicle. Unlike CTP, it is linked to the owner of the vehicle and, depending on the insurance policy, may be conditional on certain drivers. For example, if a driver under 25 has an accident the vehicle may not be covered for damages. Some agencies have a cheaper insurance premium that restricts usage to employees only.

Therefore, there may be some restrictions when sharing vehicles. Agencies would need to negotiate who will cover the comprehensive vehicle insurance. In some instances, an agency which is borrowing the vehicle will cover the insurance under their existing premium or they can take out additional insurance to cover.

Volunteers' cars, clients' cars or a staff member's own car are sometimes used if an agency vehicle is not available. In this situation, ensure that the vehicle is roadworthy, registered and comprehensively insured. Check with the relevant insurance company that the cover is not affected by additional use or any reimbursement for its use. A written agreement for the use of the vehicle is a good precaution.

It is important that insurance companies do not hold to services to ransom when it comes to insurance restrictions on transport initiatives. There is always the danger that a well-thought-out and supported transport solution can get hijacked just because the insurance company will not cover damages that might occur to the vehicle. There should always be a workable solution around insurance issues.



Transport Act and Regulation

The passenger transport industry is a highly regulated industry, operating under the *Transport Operations (Passenger Transport) Act 1994* (TOPT Act).

Before anyone operates a service that transports members of the public, they need to find out what market entry restrictions and regulations apply. Operator Accreditation and Driver Authorisation are two key regulatory requirements. A further level of regulation is imposed on core public passenger services like buses, taxis and limousines via performance-based service contracts and licenses.

One of QT's main functions is to administer and monitor compliance to the regulations.

Operator Accreditation

All operators of passenger transport services must hold Operator Accreditation, unless expressly exempt. It is advisable to check with the nearest QT Customer Service Centre in this regard.

A passenger transport service is defined as a service for the carriage of passengers if the service is provided for fare or other consideration; or the service is provided in the course of a trade or business (but not if it is provided by an employer solely for employees); or the service is a community or courtesy transport service.

There are different categories of Operator Accreditation. These include:

- taxi services;
- limousine services;
- urban scheduled services;
- minor scheduled services;
- school scheduled services;
- long distance scheduled services;
- motorcycle tourist services;
- general services (charter services, tourist services, accommodation transfer services, tourist transfer services, motorcycle tours and any non-defined passenger transport service);
- community transport services; and
- courtesy transport services.

The purpose of Operator Accreditation is to ensure operators provide safe passenger transport services; are accountable for the management of their drivers; deliver quality services; and comply with the legislative requirements.

Under the TOPT Act, Regulation and Standard, the operator has legislative requirements that they must meet to maintain their operator accreditation.

Driver Authorisation

The TOPT Act requires all drivers of public passenger services in Queensland to hold Driver Authorisation, unless expressly exempt. Again, you should check with QT first.

Driver Authorisation is a qualification a driver of a vehicle providing a public passenger service must attain and maintain to operate the vehicle while providing the service. The driver



must also be the holder of a current driver's licence for the class of vehicle being driven.

A person who applies for Driver Authorisation is subject to a driving history check and a criminal history check. They must also pass a prescribed medical check, the cost of which cannot be reclaimed through Medicare.

Driver Authorisation is issued to the driver for the different categories of public passenger services, as above. As with Operator Accreditation, the driver has certain legislative obligations under the TOPT Act, Regulation and Standard.

For more information on the specific requirements, fees and application forms for operators and drivers, go to the QT website and then to the Public Transport page:

www.transport.qld.gov.au/

Marketing and communication

There are many ways of promoting your transport service or project to let people in your community know what they can now access. These include:

- **Advertising** – advertise in your local newspaper, radio or television station.
- **Brochures and flyers** – a simple brochure outlining what you provide, to whom, when, where, fares and fees and contact details. Send to as many places and people relevant to those with transport-disadvantage.
- **Community service announcements** – some local media outlets offer free announcements of community not-for-profit events or services.
- **Media release** – write down or ring through your transport story to the local media. They will probably be interested in doing a feature – this is also free promotion.
- **Direct contact** – if you know of people who could benefit from the new service or improved access, then contact them directly. You may have names from the needs assessment phase of people who wanted to be contacted once the service was up and running.
- **Official launch** – consider an official launch of your transport service or project. Invite all the relevant community leaders, members and perhaps get your local member of parliament to conduct the official opening.
- **Information sessions** – are an opportunity to really explain or demonstrate what you are offering. Display boards and information packs help with this process. They are also a good opportunity for people to meet and network.
- **Ongoing promotion** – remember to keep people regularly updated and reminded. Utilise the media to celebrate milestones such as first or tenth anniversaries or the hundredth or thousandth person to utilise the service. Give talks on your service to meetings of local groups like National Seniors.

Also consider promoting to the wider community – across your district, region or even the state. Transport development is something that we are all learning about and sharing stories, ideas, solutions and even failures is usually a mutually valuable experience.

Your community or transport reference group can be the best connection to who you need to target. Involve them or even allow them to take on the promotional side of things.



Negotiation

One of the most useful skills you will need in transport development is negotiation. The transport arena is made up of lots of different players – commercial operators, government agencies, not-for-profit agencies, local government, sporting and recreational clubs, schools, ambulance, hospitals and so on. Often what one agency has, the other does not have and vice versa, so there is much potential for trading and doing deals. There is equally the potential for much conflict!

As mentioned earlier in this document, agencies are naturally territorial and they can become very protective of their material assets, their clients/customers and their staff. This is normal and needs to be treated with considerable respect. Any deal, sharing or arrangement needs careful and sensitive negotiation.

Negotiation takes place when two parties or people are willing to reach an agreement over an issue. However, to get to this point it usually takes one party to raise the idea or issue in the first place. Sometimes just 'sowing the seed' with another party is all it takes to get them to the table. Other times it will take a considerable sell on your part to get them interested at all.

Here is one approach to conducting successful negotiations:

Prepare

- Know what outcome you want and set the maximum to go for and the minimum you will accept.
- Find out or try to anticipate what the other party's wants and needs are.
- Have all your facts on hand.
- Choose a neutral setting to meet and discuss.
- Consider bringing a neutral person with you who doesn't belong to either agency, but who you know is on good terms with the other party and yourself.
- If this is a conflict resolution meeting, you may both need a third party to help do the negotiation or to do it on your behalf.

Discuss

- Meet face to face at a time that best suits both of you.
- Present the bigger picture or vision first – focus on what you have in common such as improving transport services in your area or keeping local businesses viable.
- State your opening position or put forward your proposal – start with the easiest to resolve issues.
- Highlight what the other party will gain, if not identified prior.
- Ask what their position is or what they think of your proposal.
- Don't assume you know the other's view – ask questions and listen attentively.
- Don't rush – allow time for the other person to think and respond.
- Read the other person's body language and nonverbal clues like voice tone and be aware of your own. Try to be relaxed and authentic – remember they will also be reading yours!

Bargain

- Be willing to trade what is cheap or less significant for you but valuable for the other party with what is valuable to you but cheap or less significant to the other party.
- Make any concession on your part conditional – avoid giving something for nothing, even if it's just goodwill that you can call on at a later time.



- Come back to the bigger picture of the problem you are trying to fix – make it a shared problem with a shared solution.
- Be open-minded to solutions or a part of the deal that you haven't thought of – allow some creative problem solving to occur.
- Avoid ultimatums or boxing people into just two alternatives.
- Avoid hostile remarks and defuse any heat to the negotiation with an apology, some well-timed humour or some time out from the discussion.

Follow-up

- Once you've reached an agreement, clarify and summarise the details and take notes.
- Write up an agreement and both parties sign.
- If it is a complex negotiation, then a solicitor may need to view or write up the agreement.
- If using a standard service agreement, ensure that the specific details of your agreement are written into an appendix. Include any items that you need an escape route from – for example, if funds are one-off or subject to government renewal.
- Review the agreement at regular intervals using a similar process to above and make any adjustments.

Support networks

Working in transport development or development work of any kind can be a lonely, frustrating job at times. There is only a handful of people working in this area in our state, although there are considerably more who work in community transport services.

Either way, it is important to connect and network with people who are facing similar challenges as yourself. In your local community or local district, there will probably be people who are working in community development or community services of some kind. Make the most of these networks by meeting regularly, asking questions and even inviting yourself to visit their area, service or centre to see at first hand how they operate.

There is a dedicated network for those working in transport development. Called the Transport Development and Solutions Alliance – Qld (TDSA), it meets three times a year, usually in Brisbane, and has an education focus as well as a support focus. The TDSA also produces a monthly e-bulletin which has up-to-date information relevant to transport development and also offers the opportunity to register your need for help, training or support. To receive this bulletin send an e-mail to the convenor, Jenny Leigh, at jenny.leigh@bigpond.com.au



Assessing success

What is evaluation?

Once you have a proposal and you are ready to implement it, it is important to have a way of tracking progress and judging success or otherwise. This is commonly called monitoring and evaluation or review. This can mean different things to different people, but it essentially involves asking:

- Did we do what we set out to do?
- Did it work? Why or why not?
- What will we repeat or do differently next time?

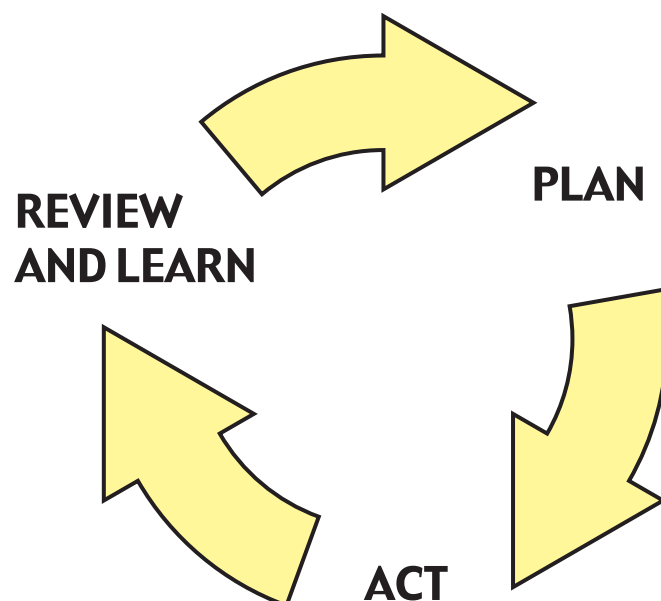
Evaluation processes are best worked out at the beginning of the project – not left to the end or after 12 months or so when valuable data may be missing. Planning an evaluation retrospectively is difficult and not always a good way to demonstrate success.

Proposals that are planned well and have clearly defined goals and objectives are the easiest to evaluate. However, not all proposals work this way and sometimes there is a lot of trial and error before it becomes clear which way to head. For this reason, there are two types of evaluation suggested for use in transport development. Ideally, both are used concurrently.

The important thing for both types of evaluation is that the processes be well integrated into the overall management of the project and that there is a constant cycle of planning, acting and reviewing – informally and formally.

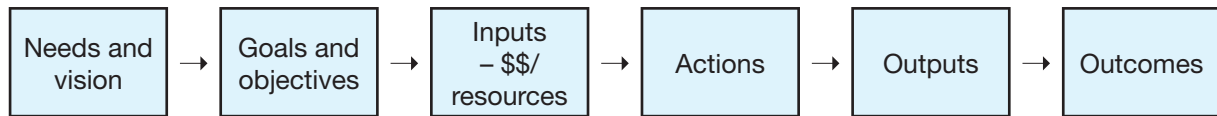
Open-ended evaluation is a more informal style and is used when there are no clear, measurable objectives. It involves learning as you go and adapting accordingly. It is not linear, but more cyclical with the aim of continuous improvement.

The evaluation cycle





Objective-based evaluation is more formal and is dependent on clear, measurable objectives. It is a more linear, ordered approach that is favoured by funding bodies as it gives them a clearer evaluation of the outcomes for their dollars invested (efficiency).



An evaluation framework

The processes used in evaluation tend to mimic the processes used in assessing needs – both are, after all, stages of inquiry. There are, however, some specific differences. The following framework adopts the open-ended evaluation approach (as above), with its cycle of three basic phases, namely to:

- Plan;
- Act; and
- Review and learn.

Plan

The first step to evaluation is to develop and plan your specific evaluation methodology. In this phase, you will need to:

- Consider why you are evaluating the project – clear purpose.
- Define the scope of the evaluation.
- Determine the resources needed to evaluate sufficiently (which may determine the scope).
- Decide who needs to be involved – for example, consider involving your reference group in the design and the process.
- Consider what outside expertise you may need – an independent person with evaluation expertise is often a good idea, even if just to consult with.
- Check if the project goal and objectives can be realistically evaluated – adjust them accordingly.
- Identify evaluation questions based on what needs to be answered.
- Decide what indicators or measures of success are to be used, based on the objectives. Keep them simple and achievable.
- Decide on the methods for gathering information and data
- Establish when the data will be reviewed and what the key milestones are.

Act

The next step is to collect the information and data to be used in the evaluation. This generally involves:

- Monitoring your indicators of:
 - inputs (funding resources, time, vehicles, volunteers and so on);



- outputs (number of trips, number of kilometres, number of passengers, satisfaction of consumers, volunteer training, transport directory, brokerage deals); and
- outcomes (changes in transport difficulty or improved access – remember that the outcomes measure the goals and objectives).
- Gathering relevant background information that gives context to your project, such as organisational planning and management documents, service records, reference group meeting minutes.
- Conducting a one-off review of the project’s progress via a survey, questionnaire, focus group, interviews or workshop. If you have access to an expert facilitator or reviewer then utilise their skills in designing and delivering these activities.

Review and Learn

Analyse the information and data

On a regular basis, at least every 6 months, the data needs to be analysed, conclusions drawn and judgements made about the performance of the project. As discussed in the earlier chapter on identifying needs, this stage of your inquiry can be tricky, especially if you have a lot of unwieldy data. Hence, the importance of having clear, concise objectives.

In reaching conclusions, it is helpful to think in terms of issues, trends and themes:

- **An issue** is something that people are concerned about.
- **A trend** is an observed change over time.
- **A theme** is a pattern or common thread of all the issues and trends.

Put conclusions into practice

Conclusions should lead, via a logical process, to ways of improving what you have evaluated. This can be presented in the form of recommendations or strategies or an action plan. This, of course, leads you back into the evaluation cycle all over again, starting with planning how you will evaluate the new action plan.

Performance indicators/measures

The following table is a simple guide to performance measures.¹¹

	Quantity (Quantitative measures)	Quality (Qualitative measures)
Effort	OUTPUTS – What did we do? <ul style="list-style-type: none"> • How many activities or how much service did we deliver? • How many people participated? 	How well did we do it? <ul style="list-style-type: none"> • How well did we deliver the activity or service? • How well was it received by participants?
Effect	OUTCOMES – Is anyone better off? <ul style="list-style-type: none"> • How much change for the better did we produce? • How many people were affected? 	Is anyone better off? <ul style="list-style-type: none"> • What quality or extent of change for the better did we produce? • What comparative changes occurred?

¹¹ The Friedman Model by Mark Friedman from the Results and Performance Accountability Guide, The Fiscal Policy Studies Institute, New Mexico US, cited in Getting the Best from your Drug Action Team Work (as referenced at the end of this section).



This table shows how the measures might be interpreted for a transport model of service and the tools that might be used to do the measuring and collecting of data.

	Quantity (Quantitative measures)	Quality (Qualitative measures)
Effort	<p>OUTPUTS – What did we do?</p> <p>How many training/information sessions did we deliver? How many vehicle trips? How many kilometres travelled?</p> <p>Tools:</p> <ul style="list-style-type: none"> • session plans • trip sheets; vehicle log books <p>How many people participated in training/information sessions? How many passengers did we carry?</p> <p>Tools:</p> <ul style="list-style-type: none"> • attendance records • passenger booking sheets 	<p>How well did we do it?</p> <p>How well did we deliver the sessions – on time, expertise used, materials delivered?</p> <p>How well did we deliver the trips?</p> <p>Tools:</p> <ul style="list-style-type: none"> • session plans and review sheets • feedback sheets from drivers/staff/volunteers <p>How well was it received by participants or passengers?</p> <p>Tools:</p> <ul style="list-style-type: none"> • feedback forms or interviews with participants or passengers
Effect	<p>OUTCOMES – Is anyone better off?</p> <p>How much change has occurred in transport difficulty or how much has access and mobility improved in transport?</p> <p>Tools:</p> <ul style="list-style-type: none"> • record of number of transport options developed and implemented <p>How many transport-disadvantaged people were affected?</p> <p>Tools:</p> <ul style="list-style-type: none"> • demographics of people using services 	<p>Is anyone better off?</p> <p>What quality or extent of change for the better in transport difficulty and improved access did we produce?</p> <p>Tools:</p> <ul style="list-style-type: none"> • focus group/interview/survey of a composite group of users. <p>What comparative changes occurred?</p> <p>Tools:</p> <ul style="list-style-type: none"> • community mapping tool – pre and post period under review

The above framework is very much an abridged description of evaluation processes. Because this area is often put on the back burner as it is thought to be too complex or time-consuming, it is advised that you seek expert advice or input. It need not be burdensome but it may require someone with expert skills to get you on the right path.

Also be mindful of any contractual or funding body obligations in relation to evaluation or providing data for evaluation. Some funding bodies or agencies brokering funds will have their own evaluation processes that may need to be adhered to.

The following are excellent resources. Although one focuses on natural resource management and the other on drug action teams, they have simple to follow steps that could be adapted to any community-based evaluation. This section has been well informed by these two resources:

Participatory Evaluation for Land Care and Catchment Groups – A guide for Facilitators by Jim Woodhill and Lisa Robins, Greening Australia 1998.
www.greeningaustralia.org.au/GA/NAT/

Getting the Best from your Drug Action Team Work developed by Bradfield Nyland Group for the NSW Premier’s Department, 2004.
www.communitybuilders.nsw.gov.au/download/CDAT_FINAL_Booklet.pdf



Appendices

Appendix 1 – Mapping tools

If using a meeting or public forum process – fill in these details	
Date:	Venue:
Facilitator:	
Name of community or interest group:	
Name of the issue being assessed:	
Number of participants:	
Name of groups or agencies represented:	

1. TARGET AREA/DEMOGRAPHICS

a. What geographic area and towns does the community area cover?

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.....

b. What are the town and shire populations?

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.....

c. What other demographic information is relevant (age breakdown; ethnicity; income; car ownership; unemployment rate)? Consult the ABS Community Profile for the area.

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d. What facilities does the community have that they need to get to (hospitals, community centres, aged care, council chambers, schools, parks, shopping centres, cinemas, library, swimming pool, meeting halls)?

.....
.....

e. What distances from these goods and services do people live?

.....
.....

f. What groups are transport-disadvantaged in the community?

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.....
.....



2. TRANSPORT RESOURCES

What transport services already exist or who has a vehicle that could have spare capacity?

Type and name of service	When it operates	Where it operates	How much it costs	Who can access	W/chair access
Taxi service:					
Local bus:					
Regional bus:					
School bus:					
RSL/club:					
Community transport:					
QAS:					
School/TAFE:					
Health service:					
Aged care facility:					
Local council:					
Rail or air:					
Brokered services:					



3. CONSULTATION

- a. What consultation with consumers, key community members and service providers has already taken place on transport problems? What were the results?

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- b. Is there a local transport reference group or network or group that is particularly concerned with transport?

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4. EXISTING SERVICES, GROUPS and SOCIAL CAPITAL

- a. What are the main services in the community (health, aged care, community, family)?

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- b. What are the main community groups (RSL, Senior Citizens, Red Cross, disability support, junior league, junior cricket)?

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- c. What self-help groups or social networks are there (bridge club, carers support group, craft groups)?

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- d. How do things get done in your community and who does them?

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- e. What is the level of volunteering in the community?

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- f. What is the willingness of agencies to collaborate or partner?

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- g. What is the level of support for each other in the community?

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.....



5. UNMET NEEDS

- a. Who is not being reached – age groups, cultural groups?

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- b. How many people are not being reached?

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.....

- c. Where are the transport gaps (suburb, out of town, in town, remote areas, long haul trips)?

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.....

- d. When – after hours, weekends, set days/times?

.....
.....

- e. What – the types of problems/issues?

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.....

- f. What are the barriers to better utilising what already exists (cost, wheelchair access, times, restricted purpose (medical only), restricted criteria (HACC clients only), unwilling to share or loan)?

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- g. Any other issues being experienced in relation to transport or mobility or access to services?

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6. POSSIBLE OPTIONS OR SOLUTIONS

- a. Have solutions already been identified? What are the strengths and weaknesses of them (use the Strengths/weaknesses template provided at the end of this Appendix)?

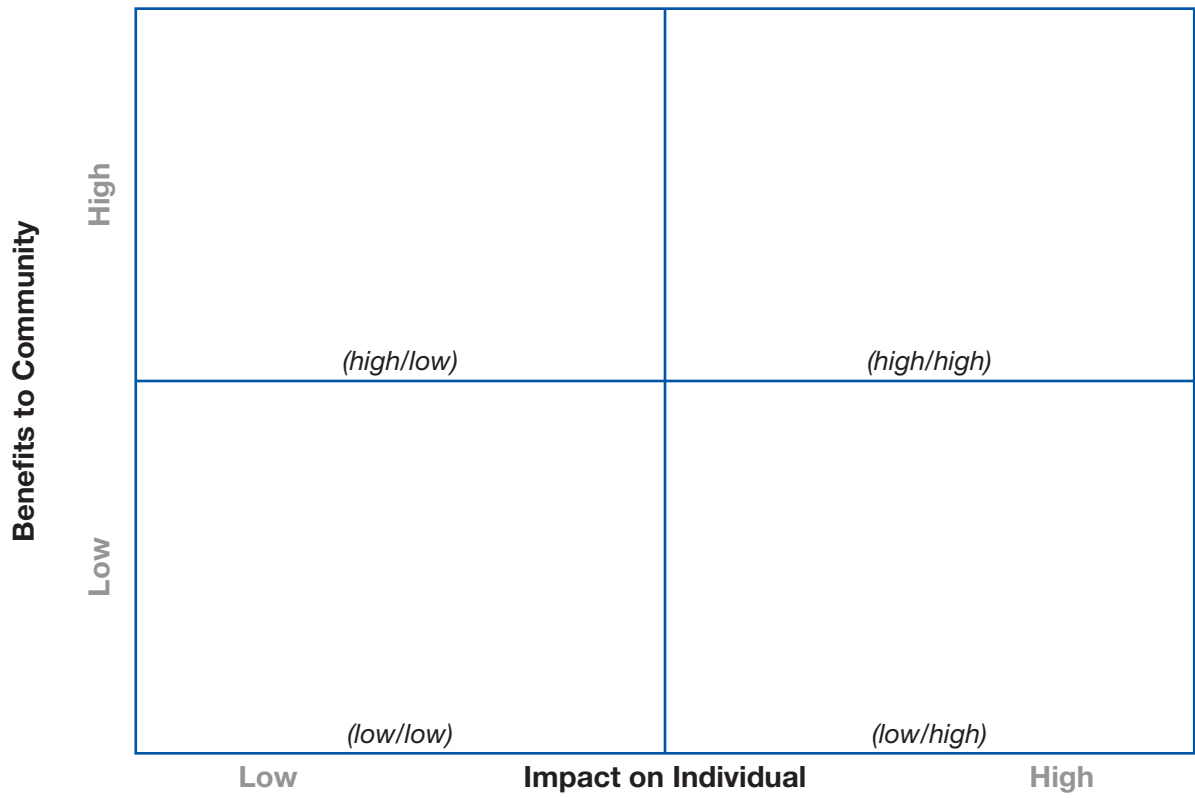
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- b. What is the priority of each of the solutions (use the Prioritising options/solutions matrix also provided at the end of this Appendix)?

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Prioritising Tools





Option/solution	Strengths	Weaknesses

Implementation timeframe/opportunity	Short-term	<i>(high/low)</i>	<i>(high/high)</i>	
	Long-term	<i>(low/low)</i>	<i>(low/high)</i>	
		Low	Impact on transport-disadvantage	High



Options/solutions best practice checklist

<p>Engages the community</p>	<ul style="list-style-type: none"> ◦ Has the option been developed by the community or at least in collaboration with the community? ◦ Are there processes for ongoing control or at least input by the community?
<p>Collaborates with other providers/agencies</p>	<ul style="list-style-type: none"> ◦ Has the option been developed in collaboration with other agencies and does it complement rather than compete with what other providers do? ◦ Does the option lend itself to a partnership with other agencies?
<p>Matches identified need for transport-disadvantaged:</p> <ul style="list-style-type: none"> • Young people • Non-car owners • Older people • Low income earners • Home workers • People with disabilities • Migrants/new residents • People in rural and remote areas 	<ul style="list-style-type: none"> ◦ Which transport-disadvantage group/s have been identified as in need? ◦ Is this a properly identified need in your community? ◦ Has the need been identified in consultation with the community and consumers/potential consumers? ◦ Does the option address the identified need?
<p>Range of trip purposes:</p> <ul style="list-style-type: none"> • Medical and health appointments • Shopping/business • Employment/training/education • Recreation and social activities 	<ul style="list-style-type: none"> ◦ Will the option cover a range of trip purposes? ◦ Does the option recognise the importance of access to a balanced set of activities (for example medical as well as social)?
<p>Range of destinations:</p> <ul style="list-style-type: none"> • Around town/suburb • Between towns/suburbs • Long distance to larger centre 	<ul style="list-style-type: none"> ◦ Will the option/s cover a range of destinations if required? ◦ Will the option offer door-to-door or other flexible pick-up and drop-off points if required?
<p>Range of times:</p> <ul style="list-style-type: none"> • Flexible times/days • After hours • Weekends and public holidays 	<ul style="list-style-type: none"> ◦ Will the option/s cover a range of times if required? ◦ Will the option's times be flexible or fixed?
<p>Range of consumers:</p> <ul style="list-style-type: none"> • HACC clients • Older people • General community • Students/youth 	<ul style="list-style-type: none"> ◦ Is access to the option open to more than one client group?
<p>Passenger comfort, choice, control and dignity</p>	<ul style="list-style-type: none"> ◦ Will the option allow the passenger a reasonable level of comfort while travelling as well as waiting at bus stops and taxi ranks? ◦ Will the option give the passenger choice and some control over the booking, the times, pick-up points, destination, who the driver is/driver behaviour and what vehicle they travel in? ◦ Does the option stigmatise the passenger in any way (like making them 'stick out')?



Reasonable cost to consumer	<ul style="list-style-type: none"> ◦ Will the option be at a reasonable cost to the consumer or can the consumer access a rebate or subsidy to help offset the cost?
Reasonable cost to community: <ul style="list-style-type: none"> • Utilises existing resources and networks • Utilises appropriate and affordable technology 	<ul style="list-style-type: none"> ◦ Does the option utilise an existing resource or service? ◦ Does the option build on social networks rather than take away from them? ◦ Does the option utilise the most appropriate and affordable technology (booking systems, fare systems, vehicles)? ◦ Does the option deliver the best ‘bang for the buck’ and effort (for the community and the funder)?
Reasonable cost to transport operator	<ul style="list-style-type: none"> ◦ Will the option require an operator to pay additional costs that can be adequately met or offset?
Capacity of operator: <ul style="list-style-type: none"> • Management infrastructure • Transport infrastructure • Customer service • Contingency plan 	<ul style="list-style-type: none"> ◦ Does the operator have the organisational, transport and customer service infrastructure in place to provide the service (bookings/scheduling, vehicles/drivers, maintenance program, inquiries/complaints) ◦ Does the operator have a contingency plan/service back-up (for break-downs and missed pick-ups)
Service management	<ul style="list-style-type: none"> ◦ Is the proposed auspice robust? ◦ Are there procedures to deal with client emergencies?
Booking and coordination of trips	<ul style="list-style-type: none"> ◦ Does the option have a booking process and someone to coordinate the trips/service?
Promotion/marketing	<ul style="list-style-type: none"> ◦ Does the option have a strategy for promoting and marketing to the people who need it?
Complies with TOPT Act requirements	<ul style="list-style-type: none"> ◦ Does the option require Operator Accreditation and Driver Authorisation? Check with your regional QT office.
Complies with Disability Discrimination Act requirements (where required)	<ul style="list-style-type: none"> ◦ Does the option give adequate and appropriate access to people with a disability? Check with your regional Disability Services Queensland office.
Complies with Workplace Health and Safety Act	<ul style="list-style-type: none"> ◦ If an agency is auspicing the option, then it will take responsibility and will need to do a safety audit.
Complies with industrial relations (IR) requirements	<ul style="list-style-type: none"> ◦ Again, if an agency is auspicing the option, it will carry this responsibility.
Adequate insurance cover: <ul style="list-style-type: none"> • Organisational insurance (public liability and professional indemnity) • Volunteer insurance • CTP • Comprehensive vehicle insurance 	<ul style="list-style-type: none"> ◦ Will the option be covered by existing insurance (including cover held by another agency in the case of brokerage) or will additional insurance be needed? ◦ Will additional insurance be too costly or can the cost be offset or negotiated with the insurance agent?
Fits in with broader or cross-regional transport planning	<ul style="list-style-type: none"> ◦ Does the option link into broader planning like QT’s Integrated Transport Planning framework in your region? Check with your regional QT office.
Fits into an overall model of transport	<ul style="list-style-type: none"> ◦ Does the option fit into an identifiable model of practice? ◦ Has the model been evaluated to be ‘best practice’?



Appendix 2 – Resources

Transport subsidies

There are many financial subsidies available for various transport-disadvantaged groups. These reduce the cost of the transport and therefore reduce one barrier, but they do not actually provide the transport.

It is surprising how many transport-disadvantaged people do not know about the subsidies available to them. A good transport plan should always include a transport information and promotion strategy:

- **Pensioner Concession Card, DVA Gold and Silver Card, Senior's Card and Student Identity card** holders are eligible for a reduction in fares on public transport.
- **Visually Impaired Passes (QT)** provides free travel on public transport for people who are certified legally blind.
- **Taxi Subsidy Scheme (TSS) (QT)** provides eligible people with a significant disability/mobility impairment with half-fare taxi vouchers.
- **Patient Travel Subsidy Scheme (PTSS)** (Queensland Health) provides some reimbursement of travel costs associated with travel and accommodation to specialist medical services not available within 50 kilometres of the nearest public hospital.
- **DVA** offers eligible veterans and war widows reimbursement of travel costs between home and an approved health care provider.
- **Mobility Allowance** (Centrelink) is available for people with a disability who are in paid employment, voluntary work or training and cannot use public transport without substantial assistance.
- **Disability Parking Permits (QT)** provide entitlement to park in disability parking bays – some of which also provide free parking.
- **Emergency relief funds** provided by local neighbourhood centres or church organisations offer people in crisis situations financial assistance towards travel costs.
- **Taxi and bus** vouchers are provided by some local agencies, including certain community transport services.

Further information on the government subsidies listed above is available from the appropriate departmental websites.

Funding sources and grant opportunities

As with transport subsidies, there are a number of potential sources of funding for community-based transport plans/solutions.

Some of the sources listed below only provide funding for capital items like vehicles, vehicle modifications (such as fitting a wheelchair lift), computers and other office equipment. Others will provide one-off project funding – for undertaking the community mapping/needs assessment task, for example, or for the employment of a transport development worker to get things up and running. Recurrent funding, in particular, can be quite difficult to source with HACC standing out as one program that will fund all three:

- Home and Community Care (HACC)
www.health.qld.gov.au/hacc
- Community Renewal (Department of Housing)
Email: communityrenewal@housing.qld.gov.au
www.communityrenewal.qld.gov.au



- Area Consultative Committees of the Federal Department of Transport and Regional Services
www.acc.gov.au
- Department of Veteran's Affairs (DVA)
Phone: 13 32 54 or 1800 555 254
- Queensland Ambulance Service
Phone: 13 12 33
- Gambling Community Benefit Fund
www.gcbf.qld.gov.au/
- Jupiters Casino Benefit Fund
www.jccbf.org.au/
- Mazda Foundation
www.mazdafoundation.org.au/
- Seniors Week or Disability Awareness Week Grants
www.communities.qld.gov.au/department/funding
- Macquarie Bank Foundation
Contact: Julie White. Phone: (02) 8232 9673 or Email: julie.white@macquarie.com
www.macquarie.com.au
- The Queensland Council of Social Service (Funding Resources Guide)
Phone: (07) 3832 1266
www.qcross.org.au
- Easy Grants
www.ourcommunity.com.au
- Queensland Government
www.qld.gov.au/grants/discoverbyname.action¹²

¹² This list is taken from Community Transport – Queensland's policy context, J. Leigh & Associates, e-book, available at: <http://www.jleighandassociates.com.au/>



Appendix 3 – References and further reading

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