

FOREWORD BY MURIEL WILLIAMS

HcL has a wealth of experience in meeting the transport needs of disabled people and others who have limited mobility and we want to ensure that that experience is used to meet the needs of our users in the future too. Thirty three years after it was founded, the time is right to take stock of the purpose of the organisation and our future direction. This strategy is therefore designed to guide the development of HcL and its services over the next 5 years. It is important that our users, funders, staff and other stakeholders all have a clear and coherent view of where HcL is heading, and why.

We want to build on our history not only to develop and improve our existing services, but also to look creatively at finding new ways to enhance the mobility and independence of everyone in the Lothians. This will mean considerable change over the next five years, and change always presents challenges; however change also brings opportunities and the exciting prospect of developing HcL in new and imaginative ways, while staying true to the values that have served us well in the past. We are confident that this is the right approach for the interests of the HcL, and most importantly, for our users and potential users.

This strategy document is published as a draft. We would like to hear what people think of our proposals for the future, and I invite members of the public, our service users, our funders and anybody with an interest in promoting the mobility and independences of disabled or elderly people to send us their comments and thoughts. We will take account of all feedback and will publish a revised and updated version towards the end of 2015.

In the meantime we will use this strategy to guide and develop our work, to improve services and get the most out of our available resources, for the benefit of those in the Lothians who continue to face barriers to their mobility and participation in our communities.

Muriel Williams
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HCL

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INTRODUCTION: OUR HISTORY AND VISION

HcL is one of the longest established and best-regarded voluntary transport organisations in Scotland. It has valuable resources in terms of the fleet of 29 vehicles, 39 staff, 33 years of experience and priceless goodwill and reputation for the quality of its service to disabled people over its history.





HcL has provided dial-a-ride services since it was set up in 1982, taking passengers to a destination of their choice seven days a week, 365 days a year. In 1991, this has been supplemented by Dial-a-Bus, providing a semi-scheduled service to local shopping centres. All our services provide not only door-to-door transport, but also a “door-through-door” service, ensuring that our users have whatever assistance they need at the start and end of their journey. This level of personal attention to individual needs is, we believe, unparalleled in Scotland.

HcL has always been largely dependent on annual grants and Service Level Agreements from the four Lothian Councils, with additional funding from central government, the NHS, charitable trusts and voluntary sources. This has meant a largely piecemeal approach to service development, with initiatives such as the recent but finished ambulance service developing opportunistically and without a clear sense of long term direction. Local councils (our principal funders) face unprecedented pressure over the next few years on their resources, and we believe that a more strategic approach is now needed.

As a result, we have prepared this document to provide that direction over the next five years, based on our wish to build on the traditional strengths of HcL and its core services providing door-through-door transport for disabled people who have limited mobility. But at the same time, we want to adopt a more innovative, proactive and ‘can-do’ approach, using our resources and expertise to promote inclusion and independence for all in new and imaginative ways.

Achieving this will require considerable change. We want to attract new sources of income in order to maintain and expand services and to reduce our dependence on our grant aid. We may need to adopt new models for operations and licensing. We may need to deepen our collaboration with other services in order to enhance integration. Enhancing inclusion may mean that we develop services which are not exclusively for disabled people but are integrated with wider public services.

In developing all our services and operational plans, we will take account of our vision that all Lothian residents should have the best possible opportunity to travel around, regardless of disability or other mobility impairment. Central to this vision is the role performed by HcL as a provider of ‘parallel public transport’ for people who cannot use conventional bus, train, taxi and tram services. HcL is therefore as much an integral part of the public transport mix as a community transport service and we want to take advantage of this position to maximise the impact that we make.

HCL TODAY

HcL carried out some 97,832 passengers in 2013-14 on our two principal services. The Dial-a-Ride service is designed to offer as wide a choice as possible to users: it operates every day of the year and bookings are accepted whenever they can be accommodated - there are no restrictions to operating hours. Similarly, there are no restrictions on where passengers can travel - although the fares for long distance travel outwith the Lothians are set at a level which is designed to cover costs. This level of passenger choice is almost unique to dial-a-ride services in the UK. Fares start at £4.00 for a single trip of one mile, rising by 25p per mile (and by 50p per mile after 20 miles). A relatively high percentage of passengers (34%) use wheelchairs. Edinburgh accounted for 43% of trips, West Lothian 28%, Midlothian 17% and East Lothian 12%.





Our Dial a Bus service provides a more limited choice of time and destination, aiming to provide at least two slots per week through a semi-scheduled, door-through-door service to local shopping centres such as the Gyle, Almondvale or Cameron Toll, depending on the area covered. There is a flat fare of £1.50. This service design means that we can carry more people together to a common destination, at a relatively low unit cost.

As of 31 March 2014, the total annual income for HCL was £1,488,070, of which £854,446 was provided by local council funding. Other significant income streams are fares and the Bus Service Operators Grant. Over the past five years, we have also acquired 13 vehicles through accessing charitable and special government funds, bringing valuable additional resources and capacity to the Lothians.

HCL is a company limited by guarantee and also a charity (SC013906). It is managed by an Executive Committee which is composed largely of service users and is elected by the members of the company each year (there were 382 members as of March 2014). 'User accountability' has been an important part of HCL's ethos since it was founded and we see this as a key strength which is to be maintained and nurtured in the future.

OPERATIONAL CHALLENGES



As we have noted above, the environment that HCL works in is changing. Much of this change is likely to increase the demand for our services (for example, the need to maintain people's independence in the community as far as possible). However, we recognise that there are also some challenges which require to be addressed. The objectives that we define in the following section are designed to respond to these challenges in the most effective way.



- Despite the contribution that HcL makes to the policies outlined above, it will be a challenge to maintain funding levels from local councils which all face tough spending choices.
- Demand for HcL Dial-a-Ride and Dial-a-Bus services has been declining, albeit slowly, over the past ten years or more, a pattern that appears to be shared by many UK Dial-a-Rides.
- Our average cost per trip is currently around £9 (for dial-a-ride and Dial-a-Bus combined). This is a lower figure than in many areas of the UK, but it is also higher than some metropolitan areas, which often focus on short, local journeys and on more mobile passengers. We want to increase efficiency and bear down on unit costs.
- As buses, taxis, trams and trains become more accessible, some disabled people who would before have needed door-through-door transport can now get about independently on public transport.
- Many people who face considerable barriers to their mobility and preferred lifestyle still do not know about HcL and how it may be able to help them.
- Users can find it hard to make bookings at the time they want and may be discouraged at having booking requests turned down because of unavailability.
- Although HcL tries to keep fares as affordable as possible, some passengers will nonetheless be deterred from travelling owing to the costs (which under current arrangements cannot benefit from the national concessionary travel scheme).
- Maintaining an up to date, reliable and suitable vehicle fleet is a constant challenge with capital funding scarce.
- We need to vacate our headquarters premises in Canaan Lane Edinburgh. These have been provided, free of charge, by Lothian Health Board since 1986 for which HcL is highly appreciative; however, they are in any case unsuitable in many respects (vehicle parking, disability access) and new suitable premises must be secured on a long term basis.

THE POLICY ENVIRONMENT

The work of HcL in meeting mobility needs and promoting independence is of great importance to Scottish public policy at a number of levels.

Nationally, the Scottish Government has defined a number of desired outcomes for all publicly-funded agencies in the National Performance Framework. HcL makes a direct and important contribution to three of these especially:

- Our people are able to maintain their **independence as they get older** and are able to access appropriate support when they need it;
- We have tackled the significant **inequalities** in Scottish society;
- We live in well-designed, **sustainable places** where we are able to access the amenities and services we need ¹.

A key recommendation of the influential Christie Commission was “the adoption of preventative approaches, in particular approaches which build on the active participation of service users and communities [which] will contribute significantly to making the best possible use of money and other assets”². HcL enables people to actively participate in their communities, to do things for themselves and maintain a social life. Public agencies would face significant additional costs should extra services need to be provided for housebound people.

The number of elderly (and very elderly) people is increasing rapidly. Across Britain, 16 per cent of people aged 70 and over report difficulty with travel to a doctor or hospital ³. By 2031, the number of people aged over 75 is projected to increase by 76 per cent⁴. As there is a strong correlation between advancing age and reducing mobility, the potential need for HcL services will increase.

The ‘personalisation’ of social care and Self Directed Support could have significant impact on HcL in the longer term. On the one hand, it could offer the prospect of people choosing to spend personalised budgets on HcL services, instead of on council fleet transport or taxis. On the other hand, it could also raise a theoretical possibility that people could choose to spend personalised budgets (including cost of the transport element for services like HcL) on other forms of transport that suit their needs better.

The integration of Health and Social Care is another important policy development which could affect HcL significantly. As noted above, there may be new opportunities to make the case for investing in services like HcL, in view of the impact our services have in maintaining and enhancing peoples’ independence in the community.

Changes to social security and disability benefits, notably the replacement of Disability Living Allowance by Personal Independence Payments (PIP), may adversely affect the mobility of many disabled people, not only from potential reduction in income but also an associated effect on eligibility for schemes such as Blue Badges and Motability.

The 2010 Equality Act is likely to extend entitlement of disabled people to access services and opportunities in every field - social, employment, education, for example. Participation in all such activities may increase the need for appropriate, accessible transport.

In addition to national and local policy on transport, social care and public services, HcL can contribute to other policy areas which are not part of its core work. Examples might include the environment, with challenging carbon-reduction targets for Scottish public bodies; and employment and skills.

At a more local level, all our main council funders are committed to maintaining and promoting the independence of people through policies such as their statutory Single Outcome Agreements and Equality Outcomes.

Edinburgh Council's Equality Outcomes for example include a specific aim "to improve demand responsive transport"⁵. Its Community Plan states "The capital's Third Sector continues to be a powerful contributor to each of the high-level Outcomes at the city and neighbourhood level. A committed, resilient and well run and well supported third sector can play a pivotal part in delivering prevention and engagement."⁶

The theme of West Lothian Council's Community Plan is "Reducing Inequalities", which includes as key outcomes "Older people are able to live independently in the community with an improved quality of life."⁷

East Lothian Council's Joint Strategy for Physical Disability and Hearing or Sight Loss includes as a key value: "Enabling services - people are assisted to minimise the impact of their disability, to maximise their independence and to live independently in the community with a reduced need for institutional social or health care."⁸

The 'Single Midlothian Plan' includes a number of priority long term outcomes, of which the first is to "Enable people to live as independently as possible."⁹

¹ <http://www.scotland.gov.uk/About/Performance/scotPerforms/outcome>

² Commission on the Future Delivery of Public Services 2011, para 6.7 <http://www.scotland.gov.uk/Publications/2011/06/27154527/8>

³ National Travel Survey 2009

⁴ 2008-based National Population Projections, Office of National Statistics, 2009

⁵ http://www.edinburgh.gov.uk/downloads/file/2011/equality_and_rights_outcomes_and_mainstreaming_action_plan

⁶ http://www.edinburgh.gov.uk/downloads/file/1457/the_edinburgh_partnership_community_plan

⁷ http://www.westlothian.gov.uk/media/3333/Single-Outcome-Agreement-2013-2023/pdf/Single_Outcome_Agreement_2013-2023.pdf

⁸ East Lothian Council: a Joint Strategy for Physical Disability and Hearing or Sight Loss http://www.eastlothian.gov.uk/meetings/meeting/5342/members_library_

⁹ http://www.midlothian.gov.uk/info/200130/communities_and_community_planning/367/community_planning/4

OUR OUTCOMES AND OBJECTIVES

Taking account of this context, HcL has identified the four key strategic goals that we aim to achieve over the next five years. Our work in the future will primarily be geared around their achievement.

- Maintain and improve our current dial-a-ride and dial-a-bus services
- Develop new services which enhance mobility
- Develop the organisation
- Extend our communications



4.1 MAINTAIN AND IMPROVE DIAL-A-RIDE AND DIAL-A-BUS SERVICES

These services have been fundamental to the work of HcL since it was established and they continue to provide around 100,000 trips a year to our users. These will therefore remain a core part of HcL activities. However, we also see scope to improve them incrementally in response to user needs; and the balance between them, and the scale of operations may need to change as we develop them and introduce new models of service delivery. In particular we will aim to:

- increase the number of trips we can offer through both Dial-a-Ride and Dial-a-Bus;
- reduce the percentage of booking requests that are turned down;
- attract new users, targeting under-represented groups such as younger people;
- reduce the number of cancellations from passengers who have already made bookings;
- improve awareness of our services among both our registered users and potential users.

4.2 DEVELOP NEW SERVICES WHICH ENHANCE MOBILITY

Alongside maintaining dial-a-ride and dial-a-bus services, we aim to expand into other activity which meets the needs of disabled people in an inclusive and innovative way. The national concessionary travel scheme is one potential source of new funding, which could bring in new income to HcL and at the same time allow many people who currently pay a fare to use their entitlement to free concessionary travel and provide an inclusive service for the public as well as our existing users. Despite relatively good public and community transport provision in the Lothians, thousands of people have lives which are restricted by lack of mobility and we need to find creative ways to combat isolation. We aim to:

- explore opportunities to deliver Dial-a-Bus or develop new community bus services under Section 22 licenses;
- investigate the scope for developing PCV contract work to enable people to access health, social care or educational opportunities;
- explore the potential to contribute to wider policy goals such as the environment (eg through low carbon vehicles), skills digital literacy;
- explore other means of support for example travel training/buddying to help encourage people to use mainstream buses;
- pilot new services in response to our funders' priorities and potential new income streams.

4.3 DEVELOP THE ORGANISATION

In order to develop our services (new or existing), HcL will need to adapt and grow as an organisation. This will require change at all levels of the organisation - the Executive, management and staff. We will aim to improve accountability to our users and our capacity to manage and successfully deliver change. We will review our requirements for staff and management, premises and vehicles, so that we are equipped with the necessary resources (human, financial and physical) to deliver the aims of the strategy. We aim to:

- develop and monitor realistic and proportionate annual plans and performance measures;
- acquire the resources we need, developing new income streams and investing effort in productive fundraising activity;
- ensure that we have appropriate premises for operating in the area;
- improve our governance, increasing the effectiveness of our committee and its engagement with our users and staff;
- encourage more people to become members of HcL, and encourage our members to participate more actively in HcL;
- explore the potential for volunteers to enhance our services;
- review and promote our image, including corporate branding;
- increase efficiency, through minimising vehicle and administrative overheads and exploiting new technology fully.

4.4 EXTEND OUR COMMUNICATIONS

As well as developing the organisation itself, we need to look outward to collaborate and communicate effectively with the many people outside HcL who are vital to achievement of our strategic goals. These include our users, our funders, other transport providers and a wide range of other public, voluntary and private bodies. We aim to:

- develop a structured communications plan to understand more about the needs and wishes of our users and potential users;
- engage with funders to fully understand their policy priorities, and to communicate effectively the contribution that HcL makes in meeting these policies;
- develop a plan for use of digital communications and social media;
- collaborate with partner organisations in the public, voluntary or private sectors where this advances our strategic aims.

IMPLEMENTING THE STRATEGY

While this document sets out our broad approach to developing services and the organisation, it does not set targets or define the practical action that we will take in order to achieve them. We will therefore complement this strategy with an annual business plan that sets out more specific actions needed to achieve these strategic aims, and ensures that these are matched to our available resources - staff, finance vehicles and so on.

Business plans will be designed so that they can be monitored effectively by the Executive Committee which is ultimately responsible for HCL's performance. We will review what indicators and measures are required to provide useful insight into progress, and will seek to understand the reasons for any difficulty in achieving our planned objectives.

The annual plan will also identify the key risks to the organisation and to the achievement of the objectives it contains.



Comments on this draft strategy are welcome: please send them to us at the contact details below by 31 August 2015.

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