

# Taxi Voucher Toolkit

Guidance for setting up a taxi voucher scheme in your area



# Is a taxi voucher scheme the answer to your transport problems?

- 1 Are services in your area disappearing, eg. hospitals, GP practices, shops, libraries, churches, day centres?
- 2 Is the social and cultural life of the area generally dependent on people having a car?
- 3 Do the existing transport services, including community transport and public transport, meet the needs of your area?
- 4 Are there excluded groups or individuals in your area that need transport to travel where and when they want, eg. older people, people with disabilities and young people, blind and partially sighted, isolated young families and youth groups?
- 5 Are you looking for a targeted effective transport scheme?
- 6 Are you looking for a transport scheme with minimum overheads, easy administration, and an established monitoring and audit trail?
- 7 Is there an organisation, such as the local authority, or an individual, that would be prepared to act as cashier for a transport scheme?

If you answer yes to these questions, a taxi voucher scheme could be the answer. Please read this guide.

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## The Countryside Agency

**The Countryside Agency is the statutory body working to make:**

- the quality of life better for people in the countryside;
- the quality of the countryside better for everyone.

**The Countryside Agency will help to achieve the following outcomes:**

- empowered, active and inclusive communities;
- high standards of rural services;
- vibrant local economies;
- all countryside managed sustainably;
- recreation opportunities for all;
- realising the potential of the urban fringe.

**We summarise our role as:**

- statutory champion and watchdog;
- influencing and inspiring solutions through our know how and show how;
- delivering where we are best placed to add value.

The Countryside Agency is a non-departmental funded body sponsored by the Department for Environment, Food and Rural Affairs.

To find out more about our work, and for information about the countryside, visit our website: [www.countryside.gov.uk](http://www.countryside.gov.uk)



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# Taxi Voucher Toolkit

Guidance for setting up a taxi voucher scheme in your area

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# Foreword

It is increasingly difficult for people without a car to access the services and help that are vital to maintain their independence in the community and that help to counter social exclusion.

Simple activities, such as shopping, getting to medical appointments at the right time, going to church, seeing friends and visiting people in hospital, can become insurmountable problems.

The introduction of a taxi voucher scheme enables people to access a means of travel, which truly can be described as demand responsive and available at all times. It is simple, targeted and effective. The scheme is easy to administer and represents value for money.

This guide has been written jointly by the Countryside Agency and Surrey County Council, drawing on the experience gained in Tandridge and other areas, to provide practical advice to local authorities and other organisations considering setting up a taxi voucher scheme.



Richard Wakeford  
Chief Executive  
The Countryside Agency



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Chief Executive  
Surrey County Council

# 1. Introduction

Work on this toolkit began in response to the Countryside Agency publication of 'Great ways to go' (CA62) in April 2001. It gives examples of good practice around England where local communities have found appropriate solutions to their transport problems, and is a useful guide for information on rural transport solutions. One of the examples in the guide is the Tandridge taxi voucher scheme. There was great interest in the Tandridge scheme from local authorities and community groups recognising the huge potential taxi voucher schemes have, and wanting advice on how to set up a taxi voucher scheme in their own area.

This toolkit gives that advice. It offers a flexible structure to suit any size of community and useful good practice examples and observations. The toolkit looks at the benefits a taxi voucher scheme can deliver to all those involved, the members, drivers, organisers and funders. It provides information and pointers that will help local groups set up a simple and effective scheme in response to their specific transport needs.

The advice in the toolkit is largely based on the experience of the members and organisers of the Tandridge taxi voucher scheme, which was one of the first schemes to be set up in the UK.

Much of the Tandridge district population live in the highly car dependent rural villages south of the M25, where public transport is poor. For people with mobility problems or for those who do not have access to a car, it is difficult to access the services and facilities they need. In response, Tandridge taxi voucher scheme was developed to provide an alternative means of transport. It became operational in 1995, has continued to develop and now covers the whole district and has over 700 members.

Also included in the toolkit are two examples where taxi vouchers have been used effectively in smaller communities. One in Hallaton, a parish in Leicestershire, and the other in Ellingham, an isolated community in Northumberland, both poorly served by public transport.

**The real test of its usefulness will be the number of people who are encouraged to start working to form community groups and develop those new schemes. Please let us know if it has been helpful in your case.**

## 2. What a taxi voucher scheme can offer

**A scheme can be designed to meet specific transport needs in a given area or target specific groups whose transport needs are a priority.**

### For members

For members of the scheme, taxi vouchers provide the means to travel to any destination at a time to suit them. This opportunity to travel is available to users over a much wider timeframe than that provided by existing, more conventional transport services. It is only limited by the resources available to the scheme. The vouchers provide members – often the more vulnerable in the community – the opportunity to travel in safety to the destination of their choice, at a time of their choosing and with the confidence that they can get home safely afterwards.

Journeys to hospital appointments, for example, become less stressful because the travel can be arranged to suit the time of the appointment. As a result the patient arrives at the appointment on time feeling more relaxed because the travel element of the trip has been organised.

Unless there is a well established public or community transport scheme in the area, most people have to rely on the goodwill of friends, relatives and neighbours to take them where they need to go. The taxi voucher scheme allows members to retain some choice and control over their lives with independence and confidence.



**"I would be absolutely lost without it - it means I can get out and about and socialise - being able to get to the leisure centre has saved my life"**

*Terry Wilde, scheme member.*





"Marvellous, a Godsend... I don't drive and I have to walk 1 mile to the bus stop. Now I get the taxi back home with my shopping"

*Anne Blake, scheme member.*

**A taxi voucher scheme allows people to retain some choice and control over their lives with independence and confidence.**

### For the scheme organiser/coordinator/ funder

For a parish, district or county council, in fact any organisation, a taxi voucher scheme offers flexibility, as well as a targeted and effective use of resources. The scheme can be designed to meet specific transport needs in a given area or target specific groups whose transport needs are a priority.

Apart from the administration cost and the cost of printing vouchers, the money in the scheme is used entirely to help people travel. The overheads are minimal and there are no capital costs, such as vehicle costs, office staff and driver salaries, insurance, fuel costs or office accommodation. Once the administration and printing costs have been met, the bulk of the funding is only spent when a member actually makes a journey – this enables an accurate audit trail to be



"I don't know what I would do without them - I wouldn't be able to go to the places I go without them. They're great."

*Jayne Feakes, scheme member.*



maintained of how much remains in the central budget throughout the year. At the end of each year, any unspent allocation - and however successful a scheme is, there will always be occasions when not all vouchers have been used – can be carried forward to the following year. This enables more vouchers to be printed for the next year and allows the organisers to invite more people to take part in the scheme.

## 3. Who is it for?

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The scheme can be adapted and shaped to respond to the specific transport needs of a particular group of people, individuals or a geographic area. The size of the scheme and range of benefit will depend on available resources. Members of the taxi voucher scheme can include people with disabilities, elderly people, who find travel on public transport beyond their ability, or those who live in rural isolation, where public transport is sparse or even non-existent.

The eligibility criteria that define who can receive taxi vouchers can be developed to suit the transport need you are trying to meet. When setting the eligibility criteria for your scheme, think about your broader objectives and clearly decide which group or individuals you want to benefit. It may be helpful to involve the local parish council or other

local voluntary groups to help set the eligibility criteria, so that this part of the setting up process is kept separate from the scheme administration. This avoids the personalisation of the selection process. It will also ensure that the scheme will meet the needs of priority groups or individuals in the community. As the scheme develops, you may want to change the eligibility criteria to ensure equity of service. The available resources will obviously restrict the area of benefit. Below are some examples of the groups that can benefit.

### Older people

Regardless of where they live, as people become older, more frail, and may no longer be able to

"Our group, 'the Ladybirds' use the vouchers for outings and to go out for meals"

*Peggy Redpath and Jean Taylor, scheme members.*



drive, they can also become more and more isolated. Often the quality of their lives will have depended on using their car to get to and from the shops, to see their friends, to support a social life and to access essential services. Once unable to drive, many older people can feel isolated, particularly in rural areas. Taxi vouchers offer an opportunity to retain some independence and control at a time in life when people may have to rely more and more on others for support.

**Taxi vouchers can offer an opportunity to retain some independence and control at a time in life when people may have to rely more and more on others for support.**

## Young families

In rural areas there are many examples of single car households being stranded when the principal breadwinner has to take the car to work. Mothers may be left all day without access to shops and services, leading to a feeling of loneliness and isolation. Including such people in the scheme brings a significant benefit to their lives.

## Carers

Carers can often only leave the person for whom they are caring for a short period of time or when substitute care is available. They do not have time to wait for public transport to arrive; taxi vouchers enable them to do their errands without worrying about a limited or unreliable public transport service.

## Young people

Young people in rural areas often find it difficult or impossible to access youth clubs, sports facilities, and education and training opportunities that are often centralised in more urban locations. Families do not always have a driver or car available in the evenings and taxi vouchers make it possible for young people to travel safely to and from their chosen activity, or to meet friends.



## People who have disabilities

People who have disabilities can find travel on public transport difficult and inconvenient. In many rural areas these difficulties are compounded by its scarcity. Taxi vouchers enable people with disabilities to travel to their destination safe in the knowledge that the taxi will arrive, take them where they need to go and bring them home again.

**Taxi vouchers make it possible for young people to travel safely to and from their chosen activity, or to meet friends.**



"I don't have to worry and don't feel I have to ask neighbours. It gives me a sense of independence"

*Edna Holmes, scheme member.*

## 4. How it works for members of the scheme

### How to apply for vouchers

People can be referred to the scheme by health and social care professionals, housing wardens, carers support workers and voluntary organisations working with vulnerable people and there is also the opportunity for people to self refer.

Members are invited to complete a simple application form that is then returned to the scheme organiser. The application form asks about what makes it difficult for people to use existing transport services. Although the scheme is not means tested, the application form also asks about benefits, disability and living arrangements (see appendix 2).

It is important to ask for this information, as it helps to determine eligibility and supports the monitoring and appraisal process of the scheme.

### This information is kept confidential

Once the application form has been processed by the scheme organiser and the eligibility criteria has been ascertained, providing the applicant is eligible, a book of taxi vouchers, a list of taxi operators and a diary form is sent out to the applicant (see appendix 3).

### Book of vouchers

Each member of the scheme is given a book of taxi vouchers; each voucher can have a face value of any amount but, as a guide, the most appropriate value is around £2. The number of vouchers in each book can vary according to resources and identified need. In Tandridge, seventy £2 vouchers – or £140 in total value – are a recommended annual amount. Once issued, the vouchers are valid for one year.

Taxi drivers are encouraged not to give change for individual journeys, and members are generally asked to make up the difference in any fare with cash. This means members cannot gain financially from the scheme and that taxi drivers do not use their own funds to give change. This encourages members to make their vouchers last longer.

The conditions of use of the taxi vouchers are written on the back of each voucher.



**Vouchers can have a face value of any amount but, as a guide, the most appropriate value is around £2.**



## List of taxi operators

When members receive the book of taxi vouchers, they also receive a list of taxi operators who will accept the vouchers.

## The diary

Members of the scheme are asked to complete a simple diary form. Completing the diary form is not a condition of membership of the scheme but provides useful information and is returned either when the taxi voucher book is finished or at the end of the year for which the vouchers are valid (see appendix 3). For some members this may not be possible or practical eg. blind or partially sighted people.

**Members of the scheme are asked to complete a simple diary form to be returned at the end of the year with the finished taxi voucher book.**

## Comments

If any difficulties arise, members of the scheme can get in touch with the scheme organiser, who will be able to deal with day-to-day issues.

"It allows me to get to Berwick to catch the train to visit my nephew"

Edna Holmes, scheme member.





## Case Study

### Ellingham taxi voucher scheme, Northumberland

The Ellingham taxi voucher scheme was set up in December 2001. The Countryside Agency met 75% of the cost of the project with a Vital Villages Parish Transport Grant and 25% funding was contributed by Northumberland County Council and the Centre for Health Development. Each member receives 100 vouchers, valued at £2 each. There is no charge for the vouchers and they can be used to pay for taxis from two local firms in a mixture of vouchers and cash. Taxi drivers redeem the vouchers monthly from the parish council.

Scheme users are mainly older people who don't drive, and younger people, who don't have a private means of transport, as well as people with disabilities. Initially, the residents of the parish were reluctant to share taxis to make their vouchers last longer, but, in the second year of the scheme, more members are sharing and making joint appointments at the health centre and elsewhere. For some who live in



**"The initial set up took a lot of work, but now it is up and running, it is simple and easy to use"**

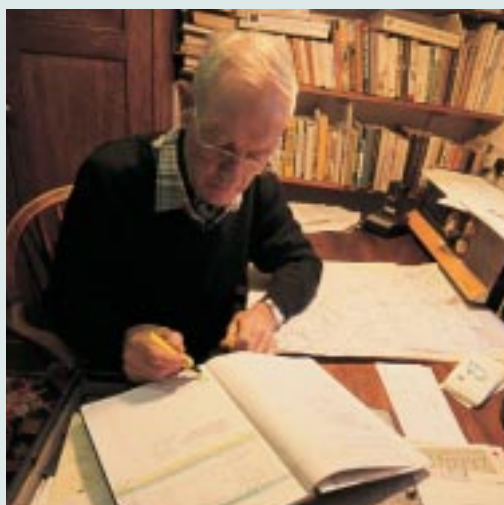
*David Griggs, scheme organiser.*

**"Having sustained an ankle injury, I have been unable to drive for the past 4 weeks... fortunately I have been able to take advantage of the parish taxi voucher scheme, an excellent new rural initiative... thank you for your support."**

*Joy Hilmarch, scheme member.*

isolated farmsteads, and even those who live in the main village, the taxi voucher scheme has brought a welcome sense of independence.

In November 2002, the Countryside Agency helped fund a second year of the scheme. Letters received from the residents of Ellingham outline their appreciation of the scheme:



**"I want to express my appreciation of the taxi voucher scheme, which I have participated in over the past year, as I live alone and do not drive."**

*Anne Blake, scheme member.*

**"I have gained a lot of satisfaction and have learnt a great deal about people's needs."**

*David Griggs, scheme organiser.*



## 5. How it works for drivers

### Identifying drivers

The licensing officer at the local council will be able to provide a contact list of both hackney and private hire operators licensed to operate in your area. All licensed taxi drivers are police checked and their vehicles undergo regular safety checks. The drivers are vital to the scheme – without drivers and their enthusiasm and cooperation your scheme will not be successful.

### Invite taxi drivers to take part in the scheme

Initially, write to operators explaining how the scheme works and ask them to complete a simple tear-off slip, indicating their interest in the scheme. Also, include in the letter an invitation to a lunchtime meeting, with sandwiches and coffee. The meeting will provide an opportunity to explain more fully how the scheme will work, who it is for and to answer any questions the drivers may have (see appendix 1).

For people living near the borders of the area of operation, key destinations may be in a neighbouring authority area and it could be more practical for members to use operators based there. It may, therefore, be necessary to write to taxi operators registered in neighbouring council areas to introduce the scheme.

When contact has been made with the drivers and a sufficient number have expressed their willingness to take part, write to confirm your interest in them joining the scheme, enclosing a simple

**Hold a meeting to provide an opportunity to explain more fully how the scheme will work, who it is for and to answer any questions the drivers may have.**

**"Best thing that has ever happened - I can go and see my daughter - I couldn't afford to before. The drivers are so good and help with my shopping."**

*Shirley Unsworth Murray, scheme member*





**Drivers exchange vouchers for cash at agreed cash-in points. Taxis are primarily a cash business and operators are reluctant to become involved in the administration paperwork or in waiting for cheques.**



**"The drivers are brilliant, there is always somebody there when you ring up"**

*Anne Blake, scheme member*

**Drivers are vital to the scheme, so regular contact with them is essential.**

registration form on which drivers should record their registration details (see appendix **1**).

As the scheme gets underway, other drivers may ask to join and members of the scheme may recommend drivers to join. Forward a letter enclosing the registration details form and add their names to the taxi driver list (see appendix **3**).

### **Taxi drivers exchange the vouchers for cash**

Drivers who take part in the scheme accept the vouchers in full or part payment for taxi journeys. Change is not given for the vouchers; members of the scheme are expected to make up the difference when necessary. The drivers exchange the vouchers for cash at an agreed cash-in point. Taxis are primarily a cash business and operators are reluctant to become involved in the administration paperwork or in waiting for cheques. The cash-in facility can be in a local council office, local leisure centre, supermarket, local post office or a local bank. There may be a nominal charge for this service and it will need to be added into the overall scheme costs. In Tandridge, for convenience, the district council holds the budget and they reimburse the cash-in facility.

### **Taxi drivers are partners in the scheme**

The drivers are vital to the scheme, so regular contact with them is essential to avoid any problems that could impact upon the success of the scheme. All participating drivers are asked to display a taxi voucher window sticker in their vehicles. Drivers may also refer people to the scheme themselves and are provided with a simple referral form to give to clients.

Vouchers are issued, and can only be used, in full compliance with the conditions of carriage of the taxi operator.

### **The taxi driver list**

It is essential that this information is accurate. After the name of each taxi company, indicate which area the taxi company covers and whether they operate fully accessible vehicles - make a point of informing potential users, it might be just what they need. Circulate the final list to each taxi operator to check for accuracy. Once it has been agreed, it can be photocopied ready to send out with the vouchers to each member of the scheme. Printing on colour paper using large print makes the list easier to read (see appendix **3**).

## 6. The vouchers



Vouchers can have a face value of any amount, but, for practical purposes, it needs to be more than £1, but less than £5, to allow users to easily make up any difference in cash. The value of the voucher used in the Tandridge taxi voucher scheme is £2.

The book of Tandridge vouchers is a convenient size (20cms x 9cms) and includes counterfoil sheets. An identification number is printed on each voucher and counterfoil, and the vouchers are sequentially numbered 0 - 70 (book number 231, for example, would have vouchers and counterfoils number 231 01, 231 02, 231 03 and so on up to 231 - 70).

As each voucher has a cash value, it's important that they are printed using a reputable and trusted printing company to prevent forgeries. Vouchers should include a hologram and other security measures to prevent duplication. Specialist printing companies can be found from a local telephone directory or from the Internet. However, smaller schemes may find sophisticated security printing uneconomic and unnecessary.

Each voucher can also carry a bar code, to enable the vouchers to be read by a bar code reader that automatically relates each voucher to each individual member of the scheme. It can also record data on a simple database or spreadsheet application, such as a Microsoft Access database adapted to meet the specific requirements of the scheme. Barcodes are optional and are more appropriate for larger schemes, where hand-counting vouchers is impractical.

It is essential that voucher books carry the name and address of the owner of the book – the Tandridge voucher books carry information on the front cover under an attached laminated strip.

The overall appearance of the voucher book needs to be bright and easy to read. The design of vouchers can be individual to each scheme but must include the following elements.

- The value of each voucher – large and luminous.
- The name of the scheme.
- The start and finish dates.
- A list of funding contributors to the scheme.
- Conditions of use on the reverse side.

**Each voucher can have a face value of any amount but for practical purposes, it needs to be more than £1, but less than £5.**





## 7. Administration process

### Telling people about the scheme

When you are considering the eligibility criteria, it is important to consult interested groups and individuals to ensure that the parameters of the scheme's eligibility are in line with resources available. Make contact with local representatives and voluntary groups to decide how to target the scheme to meet the needs of the community and to obtain nominations for the scheme. Once you have identified which groups or individuals will benefit, send a letter to local organisations explaining how the scheme works and how it can help people who have difficulty with transport. It is important to include the voluntary sector as well as statutory service providers, so try putting articles in parish magazines and the local press to explain what it is you are trying to do. Posters can be displayed in many places, such as on parish notice boards, in GP practices, libraries, or at the dentists. Other organisations you should contact can include; carers support workers, community transport schemes, Crossroads, day centres, GP practices, housing wardens in

It is important to include the voluntary sector as well as statutory service providers, so try putting articles in parish magazines and the local press to explain what it is you are trying to do.



"The most satisfying thing is people ringing up and telling me how the taxi vouchers have improved their lives"

*Lynne Geary, Tandridge scheme administrator.*





"This scheme has made a big difference to me as I can't drive my son anywhere since I strained my ankle. My son can use it whenever he needs to and he knows the driver"

*Joy Hidmarsh, scheme member.*

sheltered accommodation, independent living support workers, parish councils, social services, youth organisations, and voluntary organisations such as Age Concern.

**A word of caution here, too much publicity can raise people's expectations and lead to over subscription. Availability must match resources.**

## Sending out application forms

As people are referred to the scheme, they should be sent an application form and covering letter. Normally this would be done approximately 4 weeks before the start of the scheme (see appendix 2).

## Receiving application forms

Application forms should be filed alphabetically once the data has been recorded on the spreadsheet.

## Waiting list

If the scheme is over-subscribed, it will be necessary to place some applicants on a waiting list. You should keep a record of their name, address, parish and client group, then date the waiting list forms and store the information safely. As the scheme progresses, voucher books may become available to send to people on the waiting list.

## Book number

Taxi vouchers are then allocated according to the eligibility criteria the scheme has set. Once it has been agreed that an applicant should receive the taxi vouchers, a book is allocated to him or her. Each book has a unique number that is registered to the member who is allocated that book. This number must be recorded in the top right hand corner of the application form and on a Microsoft Excel spreadsheet, or a similar spread sheet application (see appendix 4).

**Each voucher book has a unique number that is registered to the member allocated the book.**



**Decide which parishes will benefit from the scheme and which groups of people.**

**With the proper audit trail in place, it will be possible to see at a glance who has used their taxi vouchers and how people use them**

### **Sending out the vouchers**

You should send your members a letter enclosing their book of taxi vouchers, a list of drivers who will accept the vouchers and a diary sheet. At the bottom of the letter, there is a tear-off receipt slip which members are asked to return to confirm that they have received the taxi vouchers (see appendix 3).

### **Posting the book**

Two sets of address labels are needed for each member. One address label goes on each book under the laminate strip, with the second going on the envelope for posting. You should enclose a letter explaining conditions of use with a tear off receipt at the bottom to be returned to confirm safe delivery (see appendix 3). Also enclose a diary sheet (see appendix 3), and a list of taxi operators who will accept the vouchers (see appendix 3).

As the receipt slips are returned simply mark the application form with 'R' to confirm that receipt of taxi vouchers has been confirmed.



### **Recording usage data**

When the taxi vouchers have been cashed in, they are then returned to the scheme organiser to be logged back against each individual. This can be done manually or with the help of a bar code reader (see appendix 4).

It is important to keep all the data outlined above. At the end of the year, it will be possible to analyse usage in terms of area, client group, etc. With the proper audit trail in place, it will be possible to see at a glance who has used their allocated taxi vouchers and how people use them; whether they've used them all at once or have made them last throughout the year.

### **Diaries**

The travel diary sheets ask for the following information (see appendix 3).

- The date of the journey.
- The reason for the journey ie. for social, shopping, GP appointment, hospital appointment, dentist, chiropody etc.

As the diaries are returned with the finished books, the majority of which will be at the end of the year, you should set up a computer spreadsheet to record and analyse the data in each diary. This data will inform your research into the use of the scheme and is a vital part of the monitoring process (see audit trail section 8 and appendix 4).

## Case Study

### Hallaton taxi voucher project, Leicestershire



Hallaton Parish Council in Leicestershire applied for a Vital Villages Parish Transport Grant for £10,000 in August 2002, to enable them to provide a taxi voucher service for local people. The scheme has also benefited from a grant from the Leicestershire County Council.

The voucher scheme in Hallaton is widely used by the community.

The parish council distribute taxi vouchers to members of the community to meet the cost of fares, allowing people to access a variety of services which are not available in the parish, such as their GP surgery, food stores and leisure facilities. Applicants complete a simple application form that is approved at monthly parish council meetings. Once approved, each applicant receives their annual allocation of 2

books of 10 vouchers, each voucher being worth £5.

The scheme is of particular value at weekends and in the evenings, when there are no buses. Members are encouraged to complete a diary sheet of their journeys in order to qualify for the following year. The Hallaton taxi voucher scheme has been running for over a year and now has 26 members.

The parish council use local taxi firms to carry out the work, including one firm who can cater for wheelchair users. In this way the funds remain within the local rural economy. The taxi operators are reimbursed monthly at the parish council meeting.





"I will be 90 this year - I have no family near - the vouchers mean I can go and see my husband's grave. I use them to get to my coffee mornings and to the doctors."

Norah Beasleigh, Tandridge scheme member



## 8. The audit trail

**As vouchers are returned to the scheme organiser, they are logged against each member's number**

### Monitoring and collecting data

When the Tandridge scheme started, very brief information was collected, restricted to just name, address and client group. As the scheme has developed, this process has become more sophisticated and the more detailed data is now invaluable in providing evidence when accessing future funding streams and providing an audit trail.

There are a variety of ways to carry out your monitoring process, dependent upon the size of your scheme.

However the information collected should always include:

- how many members there are in total;
- how many members per parish;
- how many in each age range;
- which client group they are in – people with physical disabilities, learning disabilities, older people, children with disabilities;
- how many members are on benefits and what these are;
- other transport schemes members use;
- how many members are registered blind and registered disabled.



**The total number of vouchers is matched to the amount of cash going out to the drivers.**

Information on taxi voucher usage is important. As the vouchers are returned to the scheme organiser, they are logged against each member's number. If your scheme is small, this can be done manually by hand-counting the vouchers and entering the number used against each member on a monthly basis, recording the information on a spread sheet or database already set up to record the members names and numbers (see administration process section 7 and appendix 4). For larger schemes, such as in Tandridge, a database application linked to a bar code reader is more useful. When vouchers are returned they can be 'read' by a bar code reader which automatically relates each voucher to the member's number on the database. The total number of vouchers used can then be matched to the amount of cash going out to the drivers. Bar code readers are readily available from any reputable computer dealer.

## 9. Financial information

There are several points to consider when deciding how many taxi vouchers to give to each individual.

- How many people are to be offered taxi vouchers?
- What is the average length of journey that people would reasonably want to make and what is the cost of that journey by taxi?
- What are the available resources, who will staff the scheme and what is the budget?

In the Tandridge scheme, members are offered £140 worth of vouchers per year. This sum was increased from £120 per year to cover the rise in local taxi fares. Experience shows that this value is sufficient to make a substantial difference to the cost of essential travel.

The Tandridge scheme is not means tested. If resources are limited for your scheme, some kind of means testing may be necessary.

**Once taxi voucher books have been allocated, the day-to-day tasks are minimal.**

### Costs

Overheads for the Tandridge scheme account for less than 15% of the total running costs.

The sort of overheads you should be aware of are:



**Security printing** – it is recommended that vouchers are security printed to prevent copying and to emphasise the cash value of the voucher. Costs will vary.

**Scheme administrator** – the administrator may have to devote up to one day per week for day-to-day management of a large scheme like Tandridge. When setting up a new scheme more time will be





needed to deal with application forms. But, once the scheme is established and taxi voucher books have been allocated, the role will not require as much time. Smaller schemes will require less administrator time.

When application forms are being dealt with more time is needed. Once taxi voucher books have been allocated the day-to-day tasks are minimal. Recording the vouchers back can be carried out once a month, or, if using a bar code reader programme, whenever the vouchers are returned to the scheme organiser. Often the administrative work can be integrated into an existing role.

**Other costs** - other costs which need to be included in the overall budget are postage, stationery, photocopying and telephone.

**Cash-in facility** - there may be a charge for cashing in the vouchers. Typically this could be as much as 25p per transaction, or a set fee of £2,000 per year. This will need to be negotiated with the organisation providing the cash-in facility.

**Purchase by other organisations** - in Tandridge, when outside agencies purchase books from the scheme, a levy of £10 is added to each book to cover printing and administration – this could be something you also need to consider.

# 10. Sources of funding

## Local authority funding

Many community transport schemes are funded by local authorities. Contact your local council, at county, unitary or district level, to see if they have funds available to support new community transport schemes.

## Other sources of funding

Information about funding for projects and/or organisations is available on the following websites:

**www.access-funds.co.uk** - This site aims to provide the latest funding information from central government, The National Lottery, devolved governing bodies and the EU.

**www.fundinginformation.org** - Online fundraising information resource for charities, voluntary organisations, community groups, local authorities, social enterprises and other not for profit organisations throughout the UK.

**www.justdosomething.net/home.vdf** - Funding opportunities and advice on what is available so that you can decide which route is most appropriate for you. From running your own event to bidding for European funds, find the essential information here.

**www.ruralnet.org.uk** - Ruralnet offers advice targeted at rural communities (subscription required).

**www.grantsonline.org.uk** - The site provides instant access to the latest information on grants from the European Union, UK Government, The National Lottery and UK grant making trusts and other external funding opportunities (7-day free trial).

**www.fundraising.co.uk** - Provides comprehensive UK charity fundraising information and services.

## Primary care trusts/regional health authorities

As services become more centralised, and public and hospital transport is becoming more difficult to access, help with transport is a necessary part of health service provision. Statistics show that, in the Tandridge scheme, more than 27% of the journeys undertaken are health related. You could also make contact with your local primary care trust or a GP practice that may buy into the scheme.

The sources of funding will vary from area to area, so always check with your local authority for current funding availability.

### Parish Transport Grant (PTG)

Taxi voucher schemes may be eligible for PTG support; however, funding is extremely limited.

### Rural Transport Partnership Grant (RTP)

This grant can support a taxi voucher scheme provided it meets the grant criteria. Funding is extremely limited, so please refer to your Rural Transport Partnership Officer for further advice.

## 11. Some alternative uses for voucher schemes

One of the advantages of a taxi voucher scheme is the flexibility of the set up process which enables it to be shaped to meet the specific needs within an area or organisation. Another feature is that organisations can buy into an established scheme to help people attend activities, such as social clubs or youth clubs.

### GP practices

A four-month pilot scheme developed in Spelthorne, Surrey, provided GP practices with taxi vouchers to allocate to patients to enable them to attend medical appointments. The scheme aims to reduce the number of DNAs (do not attends) at consultant and therapy appointments.



## Connexions

Connexions has bought into the taxi voucher scheme to enable young people to participate in youth activities. A recognised youth worker refers each young person to the scheme.

## Passport to Leisure

This is a card issued to residents in Tandridge who are in receipt of income related benefits. It entitles them to free access to leisure facilities. Members of the scheme are also eligible to apply for taxi vouchers to enable them to get to and from centrally located leisure centres.

## Third Friday Club

This is a social group for adults with learning disabilities that meets every third Friday, hence the name. The club bought one book to help club members learn about using taxis and about how the taxi voucher scheme operates.

## Mental health team

The local Community Mental Health Team (CMHT) in Tandridge has bought into the scheme. The CMHT use the vouchers to support clients in the community. Each book costs £140 plus £10 to cover the cost of printing and administration.

## Smaller parishes

In parishes, where there are just a small number of residents who need help to travel, and perhaps only one or two taxi companies available, a simple voucher/receipt scheme is more appropriate. Members of the scheme are asked to obtain a receipt for their taxi journey, which is then reimbursed at a local amenity, such as the post office or village store. The fund can be held by the post office or store, and, for a small administrative charge, the cost of each journey can be reimbursed.

## Parishes

Parishes can buy taxi voucher books to be held for use in emergency situations. These would be allocated at the discretion of a nominated parish councillor. It is up to the individual parish to decide the level of funding to be invested in the scheme. The value of any unused vouchers can be rolled over to the next year or, if appropriate, a refund given.



**"We can't drive, both on our own, so it's very convenient to share taxis to go to the health centre and the Chiroprapist"**

*Jean Taylor, Ellingham scheme member.*



**"My taxi gives a real lifeline to customers who are stuck without transport"**

*Louise Trotter, taxi driver.*

## 12. Frequently asked questions

### **Do people have to buy the taxi vouchers?**

No. The vouchers are given to each individual. Even to make a nominal charge would increase and complicate the simple administration process.

### **Should taxi drivers give change for the vouchers?**

No. Change giving by taxi drivers for individual journeys is not encouraged and members are generally asked to make up the difference in any fare with cash. This means members cannot gain financially from the scheme and that taxi drivers do not use their own funds to give change. This encourages members to make their vouchers last longer.

The conditions of use of the taxi vouchers are written on the back of each voucher.

### **What happens if the fare is not exactly equivalent to the face value of the vouchers?**

The vouchers can be used to pay, or part pay, for journeys. Members of the scheme make up the difference in change. For example, if the fare was £5.20, give two £2 vouchers and £1.20 in change.

### **Is this just for older people?**

No. The scheme can be targeted to meet the specific transport needs of any group of people.

### **Do you have to have a contract with the taxi drivers?**

No. Drivers volunteer to join the scheme.

### **Do the drivers have an account with the scheme?**

No. The Tandridge scheme is based on the drivers being able to exchange their vouchers for cash. Smaller schemes may find it easier to arrange to pay the driver by cheque.

### **Can people travel out of the area using taxi vouchers?**

Yes. Members of the scheme can use the vouchers to take them anywhere they wish.



**Are members limited in the amount of taxi vouchers they can use each week?**

No. Members can use as many taxi vouchers as they wish at any time.

**Can members apply for more vouchers during the year, if they finish their book?**

No. Only one book of vouchers is issued to a member each year.

**Can two people in one house have a book each?**

No. One book per household

**What happens if people do not use all the vouchers in the year of allocation?**

If there are vouchers left at the end of the year, they should be returned to the scheme organiser. The cash represented by those unused vouchers remains in the scheme and can be carried forward to provide more vouchers to more people in the subsequent year.

**Can people living in residential care receive vouchers?**

No. Taxi vouchers help people in the community to live independently. People living in residential care do not need to rely on transport to support their day-to-day lives in terms of getting to the shops etc. There is no reason why residential homes could not buy into the scheme and allocate the vouchers to residents as and when required.

**Can vouchers be used on Dial-a-Ride and other community transport?**

No. Dial-a-Rides and community transport are generally already subsidised. To allow vouchers to be used for other community transport schemes creates a double subsidy that would set a precedent that may not be sustainable.

**Is the scheme means tested?**

The scheme in Tandridge is not means tested, but if resources are limited this may be a necessary part of your criteria.

# Appendix 1: Set-up

**Tandridge District Council**

**SURREY COUNTY COUNCIL**

The Scheme Co-ordinator  
Tandridge taxi voucher scheme  
Surrey County Council  
Surrey

27 October 2003

Dear

Re: Taxi Voucher Scheme

A Taxi Voucher Scheme is being set up in ..... to help people who are unable to access existing transport services because of mobility difficulties or rural isolation. Members of the scheme will be given a book of taxi vouchers to use to pay for taxi journeys. Drivers who take part in the scheme can then exchange the vouchers for cash at .....

Your Taxi Company has been suggested as an organisation that may be prepared to take part in this worthwhile project. I do hope you will agree to be part of the scheme – if so please would you complete the enclosed form and return it to me in the envelope provided.

I have also arranged a meeting on ..... for taxi operators to come and hear more about how the scheme will work. Please complete the reply slip below and return it to me in the same envelope.

I hope to meet you on ....., in the meantime if you would like to discuss any issues about the scheme please telephone me on .....  
Yours sincerely,

The Scheme Co-ordinator

✂.....  
Taxi Voucher Scheme

I will / will not \* be able to attend the meeting on .....

Name : ..... Company : .....

**Tandridge Taxi Voucher Scheme**  
**1st June 2003 - 31st May 2004**

Company Name: .....

Telephone Number for Public Use : .....

Prior's Name: .....

Address: .....

Post Code: .....

One Number: .....

District or Borough Council registered with : .....

Have an accessible vehicle: YES ☐ NO ☐

Name of Driver	Driver Licence Number

Please return to: The Scheme Co-ordinator  
Tandridge taxi voucher scheme  
Surrey County Council


**SURREY COUNTY COUNCIL**

**Tandridge District Council**

A sample letter inviting drivers to come to a meeting to find out more about the scheme.

To register for the scheme, the taxi driver or the taxi company fill in a registration form.

# Appendix 2: Application



## APPLICATION FORM TANDRIDGE TAXI VOUCHER SCHEME - 2003 / 2004

Please return to: The Scheme Co-ordinator, Tandridge taxi voucher  
Council. Tel: .....

Name : ..... Telephone : .....  
Date of Birth : .....  
Address : ..... Post Code : .....

Please let us know, in confidence, why it is difficult for you  
public transport services : (e.g. medical condition, .....

Are you a carer? (Do you look after someone who is unable to manage alone)  
If yes, what relationship is this person to you?  
Husband ☐ Wife ☐ Partner ☐ Parent ☐

**PLEASE TICK THE APPROPRIATE BOXES**


Do you drive a car? Yes ☐ No ☐  
Do you have access to a car in your household? No ☐ Daily ☐ Day Time ☐ Evenings ☐  
Weekends ☐ Once a week ☐ Less ☐

Do you use any of the following:

A wheelchair:	Manual <input type="checkbox"/>	Electric <input type="checkbox"/>
Concessionary Bus Pass	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Voluntary Transport	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Dial-a-Ride	Yes <input type="checkbox"/>	No <input type="checkbox"/>

I confirm that to the best of my knowledge the information I have provided is accurate, if  
proved otherwise I will forfeit my right to receive taxi vouchers in the future. I agree to comply  
with the conditions of use of the scheme.

Signed: ..... Date: .....



The Scheme Co-ordinator  
Tandridge taxi voucher scheme  
Surrey County Council  
Surrey

June 2003

**Re: Tandridge Taxi Voucher Scheme 2003 - 2004**

To apply for taxi vouchers for the year June 2003 - May 2004 please complete  
both sides of the enclosed application form and return it to me at the above  
address as soon as possible.

Taxi vouchers are intended for people who are unable to travel using existing  
transport services because of genuine personal mobility problems or rural isolation.

As the scheme is very popular I cannot guarantee that everyone who applies will  
receive vouchers.

The vouchers, which are security printed and coded, may only be used to pay or  
part pay for journeys using taxi operators participating in the Taxi Voucher  
Scheme and are subject to the conditions of carriage of the taxi operator. The  
book of taxi vouchers is NOT transferable and must only be used by the person(s)  
named on the cover of the book. The book must be presented to the driver at the  
time of travel to obtain the concession.

**The Scheme Co-ordinator**

Enc.

**TANDRIDGE TAXI VOUCHER  
SCHEME 2001 - 2002**

Request for Taxi Voucher Application Form

Name : .....  
Address : .....  
Post Code : .....  
Tel. No. : .....  
Please send this slip to :  
The Scheme Co-ordinator, Tandridge taxi voucher scheme,  
Surrey County Council, Surrey.

When an application request is received a form is sent to the applicant along with a letter explaining a bit more about the scheme

Once the member has been allocated vouchers they receive a letter confirming their allocation, a diary sheet to record the journeys they make, and a list of the taxi operators that accept the vouchers.

TANDRIDGE TAXI VOUCHER SCHEME	
Taxi Operators who will accept your Taxi Vouchers June 2003 to May 2004	
IS (Horley)	01293 824 747
L'S TAXIS (ted)	01883 742 803 / 07889 190 184
erham / N. Tandridge)	01883 341 616 / 345 544
(Edenbridge)	07966 228 689
AXIS (Lingfield)	01342 837 766 / 01342 835 099
N. Tandridge)	07702 885 728
Y CARS sible vehicle (N.	08000 283 847 / 01883 734 985
RVICE (Caterham)	0777 592 8071
AGE am)	0870 330 1815
	01883 343 383

our journey please inform the driver that you will be using  
you have any concerns about the taxi driver or operator  
note of the licence number that is displayed on the  
the back of the vehicle.

[illegible]



# Appendix 4: Monitoring

User information					Voucher used per month												Number of vouchers		
Book No.	Name	Parish	Post Code	Client Group	J	J	A	S	O	N	D	J	F	M	A	M	Total	Used	Balance
121	Brown	Oxted	RH8 2BQ	PD	5	7	12	3	4	5	2	5	5	6			70	54	16

Codes for Client group

- PD - Physical disability
- PLD - People with learning disabilities
- OLDER - Older people
- MH - Mental Health
- YP - Young people
- CHD - Children with disabilities
- CARER - Carer or Care Worker

When the scheme organisers receive the expired vouchers from the drivers they can monitor membership information on a spreadsheet.



John Dower House, Crescent Place,  
Cheltenham, Gloucestershire GL50 3RA

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[www.countryside.gov.uk](http://www.countryside.gov.uk)

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