

SURREY COUNTY COUNCIL

CABINET

DATE:

28 JANUARY 2025



11

REPORT OF CABINET
MEMBER:SINEAD MOONEY, CABINET MEMBER FOR
ADULT SOCIAL CARE

LEAD OFFICER:

JON LILLISTONE, DIRECTOR OF INTEGRATED
COMMISSIONING

SUBJECT:

EVERYDAY LIVING OPPORTUNITIES

ORGANISATION STRATEGY
PRIORITY AREA:NO ONE LEFT BEHIND / GROWING A
SUSTAINABLE ECONOMY SO EVERYONE CAN
BENEFIT / TACKLING HEALTH INEQUALITY /
ENABLING A GREENER FUTURE / EMPOWERED
AND THRIVING COMMUNITIES / HIGH
PERFORMING COUNCIL

Purpose of the Report:

This report seeks approval to progress the Commissioning Plan for supporting Everyday Living. The key drivers are to:

- ✓ Establish quality metrics and key performance indicators
- ✓ Establish a benchmarked pricing methodology
- ✓ Secure market sustainability and growth, enabling a more varied provision.

This report also presents the Adult Social Care (ASC) Travel Policy. This will:

- ✓ Ensure that residents can refer to a public facing document, offering transparency, and managing expectations
- ✓ Assure residents that decisions regarding travel for people that draw on support from adult social care are made consistently across the County
- ✓ Assure residents that SCC will support people to use the best method of travel that will promote peoples' independence, choice and control.

The Commissioning Plan for supporting Everyday Living and the Travel Policy have a direct bearing on the Council's ability to deliver on priority objectives:

- Growing a sustainable economy so everyone can benefit: the Social Care sector in Surrey depends upon a workforce of Surrey residents and on Provider Organisations that are financially stable. The Commissioning Plan explicitly seeks to stabilise, grow and diversify the market.
- Tackling health inequality: The Commissioning Plan covers support with everyday living for some of Surrey's most vulnerable residents. This includes engagement with mainstream health and wellbeing services. Social and community inclusion are widely recognised as having a direct impact on physical and mental health and well-being, as is active travel, promoted by the Travel Policy.

- The Travel Policy explicitly seeks to ensure that people are encouraged to use the most independent forms of transport, including Public Transport rather than taxis. The ELO Commissioning Plan seeks to grow the market for travel training. This Policy therefore has a direct bearing on the Council's ability to deliver on its priority on Enabling a greener future.

The Commissioning Plan and the Travel Policy both support the Council's commitment to ensure that 'No-one is left behind', seeking to establish the support to empower people who draw on services to engage with and thrive in their local communities

Recommendations:

It is recommended that Cabinet:

1. Approve the commissioning strategy for supporting everyday living for adults and young people in transition with eligible needs, through a Light Touch Regime procurement process under The Public Contracts Regulations 2015 or the Procurement Act 2023, as appropriate.
2. Approve that the ELO tender be commenced in quarter 4 of financial year 2024/25.
3. Approve delegated authority to the Executive Director, Adults, Wellbeing and Health Partnerships in consultation with the Cabinet Member of Adult Social Care. for awarding the contract/s.
4. To note the outcome of the formal consultation on the AHWP Travel Policy and to approve and agree to publish the AWHP Travel Policy as an integral document that supports the aims and desired outcomes of the Everyday Living Opportunities Tender.

Reason for Recommendations:

Most community services are currently commissioned via individual spot contracts, which offer a limited overview of equity, quality or price. With population growth, an ageing population, greater numbers living with disability, and financial constraints, more cost-effective approaches to procuring high quality support for people with eligible needs must be established.

The Travel Policy is an important enabler for this work, playing a central role in facilitating increased independent travel and supporting people who draw on services (and their families) to understand eligibility criteria and independently consider their travel options when accessing support with everyday living. The policy is an important tool for communicating with Surrey's residents.

Executive Summary:

Support with Everyday Living

1. In April 2024, the Everyday Living Opportunities (ELO) Project was established within the Transformation Programme for the Adults Well-being and Health Partnerships Directorate (AWHP). The specific aims of the project are to:
 - ✓ Drive improvements in service quality and outcomes for residents
 - ✓ Establish a more stable, growing, diverse marketplace.

- ✓ Strengthen cost effectiveness and support delivery of MTFS savings

2. AWHP invest just over £28.96m each year on support within scope of the ELO Project.

Client Group	Day Services	Outreach	Transport	Supported Employment	Total
LDA	17.227	3.303	4.012	1.282	25.825
PDSI	0.510	0.786	0.103	0	1.399
OP	1.029	0.220	0.116	0	1.364
MH	0.049	0.210	0.011	0	0.270
Carers	0.001	0.099	0	0	0.099
Total	£18.815	£4.618	£4.242	£1.282	£28.957

An additional £48.2m is spent annually through Direct Payments, the large majority being within scope.

3. The ELO project seeks to ensure support enables people to remain independent for as long as possible and to thrive in their communities. The models of care in scope are:

- Employment Support
- Vocational activity (unpaid activities that maintain and develop skills)
- Day services
- Community based outreach
- Travel training (time-limited)
- Non-residential short-breaks (respite)

4. The project links with other Transformation projects (e.g. Thriving Communities, Technology Enabled Care) to ensure asset-based commissioning. It links with initiatives address related themes, such as the 'Workwise' and 'Workwell' initiatives overseen by SCC's Public Health Department and the supported employment programme for people using mental health services overseen by Surrey Heartlands ICB.

5. To secure quality assurance and cost efficiency, the project is working to develop a strategic commissioning framework through which support with everyday living will be procured. This will:

- ✓ Establish quality metrics and key performance indicators
- ✓ Establish a benchmarked pricing methodology
- ✓ Secure market sustainability and growth enabling a more varied provision

6. The ambitions of the ELO project are to:

- Promote and facilitate progression (skills gain and greater confidence)
- Develop more vocational opportunities (unpaid) to aid skills development and confidence
- Support greater numbers of people into paid employment (working with employers as well as the individuals seeking employment)
- Expand the Travel Training offer to support more people to travel independently (facilitated by the Travel Policy)

- Establish a larger and more diverse range of non-residential short breaks, which sustain the skills gain and inclusion promoted by ELO models of care¹, to reduce reliance on unnecessary residential short-breaks
- By promoting and facilitating skills gain and social inclusion, people who draw on support will become more independent and achieve an improved sense of wellbeing.
- Social inclusion will benefit both the people who draw on support and other residents within the community: a diverse community is a strong community.

Travel Policy

7. Currently there is no public-facing AWHP Travel Policy to inform people who draw on adult social care of the support they can expect from SCC to get to a service or activity set out in their care plan. The impact is that people who need to travel to access the support they are eligible to receive and their families are not able to independently consider their options or understand eligibility criteria.
8. In accordance with The Care Act 2014 Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing. The current spend on Transport for Adults with eligible needs is over £2.8m, of which 93% relates to the learning-disabled population. In the absence of a Policy, support commonly equates to individual taxi hire, yet many people are able to travel independently, some requiring support to develop the required skills for use of Public Transport and road safety.
9. Staff engagement in 2023 found that existing AWHP workforce guidance is not readily available and that staff need support in communicating to individuals the options available and the process for decision-making.
10. The Freedom to Travel Board agreed that residents and staff would benefit from a transparent published policy and, given the large majority of spend is to enable the learning-disabled population to access support, the Disabilities Commissioning were asked to lead its development.
11. The Policy has been developed with extensive engagement of people who draw on services and their families, followed by wider consultation. Once published it will be supported by staff guidance and both will be promoted.
12. The final draft, available as annex one, informs people who use adult social care services of the Councils statutory duties under the Care Act 2014 regarding the provision of travel support and the Councils obligations to promote people's independence. It is a tool for ensuring consistent decision-making across AWHP and for assuring residents of this. It also provides a clear and coherent process should a person who uses adult social care, members of their families or their carers appeal a decision.

¹ Commonly non-residential short breaks will equate to additional hours to existing 'placement's to ensure they benefit from established relationships and care plans.

13. The policy supports the Freedom to Travel Vision that by 2030 all Surrey residents requiring travel assistance will have the freedom to travel to access opportunities that make their lives better so no one is left behind.
14. Approval and publishing of the Travel Policy will:
 - ✓ Ensure that residents can refer to a public facing document, offering transparency, and managing expectations
 - ✓ Assure residents that decisions regarding travel for people that draw on support from adult social care are made consistently across the County
 - ✓ Assure residents that SCC will support people to use the best method of travel that will promote peoples' independence, choice and control.

Consultation:

15. Both the ELO Commissioning Plan and the Travel Policy cover all adults with eligible needs, and the ELO Commissioning Plan all models of community support that do not include accommodation. They have been developed over a period of over two years and there has been a significant amount of engagement with the different stakeholders during this time. This is outlined below, and further detail can be found in the 'Consulted' section towards the bottom of this paper.
16. Staff in operational ASC teams fed into the design of both, either formally through project specific teams or through their own team meetings. Staff of the ICBs also fed in.
17. People who draw on Services have been engaged through a number of established networks. Their Carers have been engaged separately.
18. The broader cohort of people that use transport procured by AWHP were invited to additional focus groups to inform the Travel Policy.
19. During 2024, three Market Engagement Events and five detailed focus groups about specific models of care sought providers' views that fed into the design of the ELO Commissioning Plan. We also published a Request for Information (RFI) which elicited 20 additional responses and 13 follow-up discussions with individual providers.
20. Key findings from engagement discussions (further detail can be found as annex two) were as follows:
 - People would like to see more choice, and opportunities for day services that focus on developing independence and skills that lead to outcomes, rather than just activities.
 - The variety of offers is valuable - one size does not fit all.
 - People want a more community-focussed approach, making more use of universal offers, communication and collaboration. Links with libraries, transport hubs, businesses.
 - Need to influence public understanding to build inclusive communities - Safe Spaces schemes, quiet times, transport, green space, accessible environments.

- More focus on employment is welcome.
- Moving away from traditional based day services is welcome, acknowledging some building-based hubs will continue to be required.
- Location is important – people want support close to home, but currently it is not evenly distributed.
- Some support needs to be aimed at autistic people without a learning disability as well as people with a learning disability.

21. The draft Travel Policy, informed by the engagement above, was subject to full public consultation for 10 weeks, ending 31st December 2024. Key messages (further detail can be found as annex three) were as follows:

- People who draw on services, the people that support them and Adult Social Care staff want better information regarding the travel options available in local communities. People also highlighted the barriers to accessing both community transport and public transport.
- People want to be able to learn to travel independently
- There was a lack of knowledge from users and staff about the methods of support people could access such as the companion element of the bus pass and other aids (travel support cards) to help safe travel
- People wanted clearer guidance of how to appeal against decisions made by Adult Social Care regarding travel.
- People were asked their views regarding crucial elements of the policy that support the Care Act 2014's requirements and Surreys Climate change strategy. Most people who completed the consultation document agreed with the policies approach.

22. The Project Team leading the ELO workstream reports through the Community Opportunities Board and Market Shaping and Commissioning Board to AWHP DLT. That for the Travel Policy to the Freedom to Travel Board.

Risk Management and Implications:

23. ELO Commissioning Plan

i. Strategic:

- AWHP are committed to the co-design of an evaluation question with people who draw on support. It is proposed that answers to this question are then evaluated solely using criteria co-designed with people who draw on support. The Council will need sufficient time to co-design the evaluation question.
- In the current financial climate providers increasingly approach SCC to suggest financial vulnerability. This could lead to reduced diversity in the marketplace. The ELO workstream sends a positive signal that might mitigate this risk.
- There is an explicit driver to ensure people link with their local communities and mainstream services as much as possible. In the current financial

climate providers this may prove more difficult. The ELO workstream sends a positive signal that might mitigate this risk.

ii. Service Delivery (Injury / Harm)

- Spot contracts don't give enough visibility of quality of care. Until the council completes the procurement process, the risk is still carried.
- If Direct Payment uptake rates increase, there will be less visibility on quality (majority of DPs are ELO type models of care). However, we have inserted a clause into our standard contract to offer some protection against this risk.

iii. Financial

- There is an explicit driver to ensure people link with their local communities and mainstream services as much as possible. The current financial climate might mean that there are fewer of these available, which would have a financial impact on SCC. This makes the cost effectiveness and cost avoidance elements of the ELO Commissioning Plan all the more important.
- There is a risk that prices for services within the remit of the ELO Commissioning Plan could increase above budget affordability if the ELO tender is not conducted in a way that minimises this risk. The ELO project team will be working closely with Finance to ensure that the approach implemented for the tender mitigates this risk as far as possible.

24. Travel Policy

i. Strategic:

- By giving practitioners the confidence and guidance to explore different ways that may support people to travel independently e.g. Technology and/or Travel Training, the Policy mitigates the risk of not realising the council's ambition to support people who draw on support to link with their local community and, access mainstream services as much as possible.

ii. Financial

- The ASC annual spend on transport is 2.8m (Adults with Learning Disabilities and/or Autism). In addition, there are over 300 people who use their Direct Payments to pay for travel-related costs. The Travel Policy gives confidence and guidance to the practitioner to explore alternative forms of travel that builds independence and is better value. Without the policy, there is a risk that practitioners will feel less confident when exploring alternative options and continue to commission expensive taxis.

Financial and Value for Money Implications:
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25. The delivery of ELO Commissioning Plan is intended to introduce contractual quality standards and regularise the costing approach for each model of care. While in itself this is not expected to deliver cost savings, it is a strategic tool for the more effective long-term management of the budget. The ELO project

team is working closely with Finance to ensure that the approach implemented for the ELO tender minimises financial risk to the Council.

26. There are £1.5m of efficiencies budgeted over the next three years for supporting people with Learning Disability or Autism with day care and transport packages to move towards a more personalised approach that is less reliant on more institutionalised building-based services. These efficiencies will be achieved through strengths-based reviews and effectively supporting people through changes in the way they are supported. Successful implementation of the ELO Commissioning Plan will help support delivery of these efficiencies through improving consistency of provision and enabling changes to care delivery models. The ELO Commissioning Plan will also support the delivery of efficiencies to contain demand pressures within the affordable trajectory outlined in the Council's Medium Term Financial Strategy through the cost effectiveness measures set out below.
27. The structured commissioning approach proposed affords greater cost effectiveness:
- By introducing a Travel Training offer there is expected cost avoidance through the reduction of transport related costs (supported by the Travel Policy)
 - By growing the supported employment offer there is expected to be cost avoidance through the reduction of reliance on ASC, supporting achievement of cost containment demand management efficiencies.
 - By introducing a larger and diverse range of non-residential short breaks there is expected to be cost avoidance through the reduction of reliance on unnecessary and more costly residential short-breaks.
 - By promoting skills gain there is expected to be cost avoidance through a reduction in support costs, as people who draw on support become more independent and achieve an improved sense of wellbeing which will help delay or reduce unnecessary reliance on adult social care support.

Section 151 Officer Commentary:

28. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. The Council has made significant progress in recent years to improve its financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.
29. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past

decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority, in order to ensure the stable provision of services in the medium term.

30. The proposed implementation of the Everyday Living Opportunities Commissioning Plan and AWHP Travel Policy will support delivery of efficiencies budgeted in the MTFS related to changing care models and demand management through enabling improved consistency of care provision and more effective market management and brokerage of services.
31. It is important that the approach agreed for the ELO tender minimises financial risk to the Council as set out in the risks section above.

Legal Implications – Monitoring Officer:

32. In procuring the services outlined in this report the Council must comply with the Council's Constitution and any relevant National legislation, alongside the Council Procurement and Contract Standing Orders (PSCOs) and the Public Contracts Regulations 2015 (including any superseding legislation) (where appropriate).
33. The council has a statutory duty under the Care Act 2014 to meet a person's eligible needs, the Act states that, 'Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing'. There has been informal engagement and a formal consultation to seek feedback on the draft policy.
34. The best value duty is contained in s3 of the Local Government Act 1999 as a result of which the Council is under a duty to make arrangements to secure continuous improvement in the way in which functions are exercised, having regard to a combination of economy, efficiency and effectiveness. The relevant guidance states that Councils should consider overall value, including economic, environmental and social value when reviewing service provision.

Equalities and Diversity:

35. The EqIA for [Everyday Living](#) [Everyday Activities EIA : Equality Impact Assessment - Surrey County Council](#) has highlighted a positive impact specifically for the following protected characteristics:
 - i. Age
 - With the expansion of the supported employment offer people of working age 18 to 65 will benefit from more support which will enable them to access job opportunities.
 - Likewise, the expansion of Vocational activity.
 - ii. Disability
 - Commissioners will have increased oversight of the market and will thereby be able to address gaps and duplication, as well as work to improve quality and promote progression.

- The Commissioning framework promotes the expansion of support for people diagnosed with dementia.
- iii. Race
- Commissioners will require providers to ensure services are welcome for all by providing accessible information for people for whom English is their second language.
 - Providers will be asked to report on the ethnicity of their clients and how they are ensuring their support is tailored to meet their individual needs.
- iv. Religion
- Providers will need to ensure that they support different religions and beliefs.
- v. Carers
- The expansion of the non-residential short breaks offer will benefit carers.
 - Carers can be assured that the person they are caring for is being given the opportunity to expand their skills and meet their aspirations.
36. There are also negative impacts identified for groups with the following protected characteristics, which we seek to mitigate.
- i. Disability
- The move towards greater independence in the community may cause some to feel anxious. The support to develop greater confidence and independent living skills will be personalised and will counter this.
 - Providers might be reluctant to support people to move on to other services or employment that supports the individual's progression and skills gain. To reduce this risk, commissioning officers will promote move on and collaboration across the sector.
- ii. Carers
- Move towards greater independence in the community may cause carers to feel anxious if they have been used to services being in building based, segregated settings. Support for Carers will seek to mitigate this.
37. Travel Policy EqIA ([Equality Impact Assessment - Surrey County Council](#)): The EQIA determined that the following groups with protected characteristics may be positively impacted by the Travel Policy.
- i. Age
- The policy will support staff to advise people of all ages about their eligibility for Motability and any welfare benefits that support their travel.
 - The policy will promote awareness amongst AWHP staff of new technology enabled devices that can support people to maximise their independent travel.
 - Users and carers groups will be able to access information and advice to support people of all ages and signpost them appropriately.
 - The policy should enable staff to support people of all ages to maximise their independence in the community e.g. attending hospital appointments, accessing employment and community activities

- ii. Disability
 - The policy will help AWHP staff advise people with a disability about their eligibility for Motability and any welfare benefits to support their travel.
 - User and carer groups will be able to access information and advice to support people with a disability and to signpost them appropriately.
 - The policy/guidance should enable staff to support people of all ages to maximise their independence in the community e.g. attending hospital appointments, accessing employment and community activities
 - iii. Digitally Excluded
 - The policy will inform those that are digitally excluded how to access support without having to rely on others or having to use technology as phone numbers are also supplied within additional information.
 - Paper copies will be available in various locations across Surrey e.g. Libraries.
 - Paper copies can also be available upon request.
 - The policy works with screen readers for those visually impaired. Copies can also be requested in large print and braille.
 - People can also be referred to Tech Angels for support. This is delivered by Surrey Coalition of Disabled People.
 - iv. Education/Training (literacy) Need
 - The policy will be available to people in accessible formats including Easy Read which will ensure that they are able to access the policy and therefore have access to information and advice.
38. There were no negative impacts expected from the implementation of the Adults Travel Policy.

Other Implications:

39. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting / Looked After Children	N/A
Safeguarding responsibilities for vulnerable children and adults	<p><u>ELO Commissioning Plan</u></p> <p>a) Establishes stronger contractual levers regarding safeguarding.</p> <p>b) The quality assurance measures providers must demonstrate to secure business from AWHP are designed to provide an early warning system.</p> <p><u>Travel Policy</u></p> <p>This transparently sets out the eligibility criteria and the process for determining the appropriate support with transport to services. The discussion</p>

	occurs between the individual and their social care practitioner. Safeguarding legislation and good practice applies throughout.
Environmental sustainability	<p>A full Environmental sustainability appraisal is not applicable.</p> <p><u>ELO Commissioning Plan</u> The models of care in scope utilise existing community assets and facilities. The growth of a Travel Training offer promotes and facilitates the use of Public Transport.</p> <p><u>Travel Policy</u> The Travel Policy promotes and facilitates the decreased use of private transport.</p>
Compliance against net-zero emissions target and future climate compatibility / resilience	As above.
Public Health	<p>The Commissioning Plan relates to the services people draw on that support them with their everyday lives; this includes engagement with mainstream health and wellbeing services, and social and community inclusion recognised as having a direct impact on mental well-being.</p> <p>Management of the market offering Employment support aligns with the management of Surrey's Workwise and Workwell programmes.</p>

What Happens Next:

40. Indicative timeline (subject to change)

Early Spring 2025	- Commence the procurement process
Late Spring / Early Summer 2025	<ul style="list-style-type: none"> - Evaluation, Moderation, Governance - ELO Contract award notification - Travel Policy published and promoted - Staffing guidance regarding the Travel Policy internally published and promoted
Autumn 2025	<ul style="list-style-type: none"> - Mobilisation - Contracts commence - All new business goes through the new contractual process

41. Communicating the ELO Commissioning Plan to residents and stakeholders:

- Embedding the aspirations and processes within practice will be achieved through engagement with each adult social team, with staff guidance added to a designated share point page.
- The creation of a residents-facing webpage on Surrey County Council's website, which informs residents of the opportunities available to Surrey residents who draw on adult social care support.

42. Communicating the Travel Policy to residents and stakeholders.

- The Adults Travel Policy will be embedded in adult social care practice by engagement with each team. Engagement will include promotion of a staff guidance document that accompanies the policy and a staff reference page on share point.
- A residents-facing webpage about travel will be created which will include a link to the Adults Travel Policy. Staff will also be able to refer people to this link.

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Consulted:

Internal

i. Governance

The Everyday Living Opportunities Commissioning Plan and the Travel Policy have each been the subject of papers taken to the following:

- Councillor Sinead Mooney, Cabinet Member
- AWHP Senior Leadership Team
- Corporate Leadership Team
- Procurement Board, 10 December 2024 (Commissioning Plan only)
- ICAB, 26 November 2024
- Select committee: a briefing has been offered to Select Committee and will be arranged for January in advance of cabinet, if requested.

ii. Project Team

A project team has been established to design the ELO commissioning plan. This includes ICB colleagues.

The Travel Policy was designed by a sub-committee of the Freedom to Travel Board.

iii. Members of staff

Members of staff within the Central Disabilities Team, the Transition Team and the Mental Health Team were engaged in the development of the ELO commissioning plan.

Members of staff across AWHP were invited to engage in the development of the Travel Policy. The Core Team included the Senior Manager of the Transition Team.

External

i. The ELO project team includes ICB colleagues.

ii. People who draw on Services

Refreshing the commissioning approach to the model of care for Supporting people with their Everyday Living has been discussed over the last two years with a range of stakeholders and people that draw on adult social care services.

The networks used are:

- Valuing Peoples Groups (four Countywide)
- Surrey Peoples Group
- Autism Partnership Board
- Disabilities Partnership Board
- Learning Disability Partnership Board

The same groups were engaged in the development of the Travel Policy, and the broader cohort of people that use this type of service were invited to focus groups.

iii. Carers

We have engaged with stakeholders across the Carers' system.

iv. Providers

During 2024 we have held three Market Engagement Events and five detailed focus groups with providers about specific models of care. These equated to the active engagement of c80 different providers.

We published a Request for Information (RFI) which elicited 20 additional responses and 13 follow-up discussions with individual providers.

v. Formal public consultation

The draft Travel Policy, informed by the engagement above, was subject to full public consultation for 10 weeks.

Annexes:

Annex 1: Travel Policy (draft)

Following Cabinet approval in January 2025, the expectation is that the Policy and accompanying Staff guidance will be published by the start of the next financial year.

Annex 2: Summary of Market Engagement Feedback regarding the ELO Commissioning Plan

Annex 3: Summary of Feedback regarding the draft Travel Policy

Part 2 report

Annex one: Adults Travel Policy (DRAFT V7.4)

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1. Introduction

Adults, Wellbeing and Health Partnerships (AWHP) is a directorate of Surrey County Council which includes adult social care. AWHP is committed to the council's overarching ambition to help everyone in Surrey benefit from all the opportunities on offer in our county, and to ensure that no one is left behind, now, and in the future. The council is committed to helping those most in need of support and improving quality of life for everyone.

AWHP supports local people who draw on care and support by promoting independence, personal choice and control. This extends to support to travel, to enable people to be as mobile and independent as possible to help them achieve their personal outcomes and aspirations in their daily lives.

This document sets out the policy for the provision of support with travel by AWHP within its powers and duties under the Care Act 2014.

This policy provides a framework and best practice for professionals to implement when supporting people.

2. Purpose

- 2.1 The policy document sets out how residents are supported by AWHP and how they may be supported to get to a service/activity/occupation that meets their [assessed eligible need](#) under the Care Act 2014.
- 2.2 The policy document aims to inform residents of Surrey. It will ensure that the residents of Surrey who use AWHP services and their carers have access to the policy that is used for decisions made regarding travel.

3. Statutory duties of the local authority

- 3.1 The council has a statutory duty under the Care Act 2014 to meet a person's eligible needs. If attendance at a day service or community activity/occupation meets the individual's assessed eligible need, this **does not** automatically mean that transport to this service will be included.
- 3.2 If a person cannot travel to the service/activity/occupation independently or with support from their carer or family member, then the council will consider the most appropriate best value option that can support the individual to travel to the service that meets their assessed needs and supports their independence.

4. Legislation and policy context

The aims and underpinning principles of the policy are set out in section 7. They are to be understood within the context of national policy and legislation. For further

information about any of the legislation mentioned in this section, please visit:
www.legislation.gov.uk

The Care Act 2014

The [Care Act](#) states that the local authority has a duty to prevent, postpone and minimise developing needs for care and support or delay people deteriorating such that they would need ongoing care and support. All assessments must be person-centred and based on promoting independence and overall wellbeing. People should be empowered to be in control of their own services (through personal budgets and direct payments where eligible) and supported by relevant and up to date information and advice that will enable individuals and carers to make the choices that are right for them.

The Act states that, 'Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing'.

Mental Capacity Act 2005

The Mental Capacity Act (MCA) is designed to protect and empower people who may lack the mental capacity to make their own decisions about their care and support. Every adult has the right to make their own decisions wherever possible. You can find out more by following the link below: [Mental Capacity Act 2005 \(legislation.gov.uk\)](#)

The Equality Act 2010

The [Equality Act](#) provides protection for people with protected characteristics against all types of discrimination.

Taxis and Private Hire Vehicles Act 2022

This [Taxis and Private Hire Vehicles Act 2022 legislation](#) sets out the specific responsibilities taxis and private hire have with respect to disabled customers and ensures they will have reasonable mobility assistance without being charged extra.

Surrey County Council Policies

The policies below add further context to the Adult Travel Policy.

- [Surrey County Council Adult Social Care Vision](#)
- [Community vision for Surrey in 2030](#)
- [Active travel and personal mobility policy](#)

The Joint Strategic Needs Assessment (JSNA) is an assessment of the current and future health and social care needs of the population of Surrey.

- [Joint Strategic Needs Assessment](#)

5. Scope

5.1 In scope

This affects all adults aged 18 and over who have an assessed eligible need under the Care Act 2014 and require support to travel to the activity that meets their eligible need.

5.2 Not in scope

People who live in or travel to and from residential or nursing homes are not within the scope of this policy.

Health appointments are not within scope of the policy. (For the avoidance of doubt, the council shall not fund or pay for any health-related services or therapy services as such services that are funded by the NHS.) People accessing hospital visits may be able to claim a refund of reasonable travel costs under the [Healthcare Travel Costs Scheme](#), or people may be eligible for [non-emergency patient transport](#).

Eligibility for transport assistance for young people within the age group of 18-25 with or without an Education, Health and Care Plan (EHCP) to attend an education placement is covered by the [post 16 transport policy](#).

6. The policy

- 6.1 The Travel Policy aims to promote people's independence, enabling them to connect with their communities and promote an active lifestyle.
- 6.2 We will support people to learn, or re-learn, the skills to be independent.
- 6.3 If a person has difficulty in getting to a destination or finding the support to do so, the council will help them access the most appropriate travel option available. This includes community transport, public transport, voluntary transport schemes, technology-enabled support and any other travel support that may be available in the local area.
- 6.4 Surrey County Council will fund or arrange transport if it is the only reasonable way of ensuring a person can safely get to the service/activity/occupation that meets their assessed eligible need. If a person can get to a destination themselves or source the support to achieve this, there will be an expectation that they will do so.
- 6.5 If an individual has been assessed as requiring travel assistance to enable them to travel to a service/activity/occupation that meets their eligible need, short-term travel training, technology-enabled support, a personal assistant, a support worker, support from the individual's family or the voluntary sector will be considered in the first instance.
- 6.6 Other forms of travel support will be considered if the above is not available or will not enable the person to travel to a service/activity/occupation that meets

their eligible need. This could be funded by a direct payment or procured by the council.

- 6.7 There is an expectation that family/carers will pay for any costs incurred by carers to visit the person that is being supported by AWHP within Surrey or out of the county of Surrey (as per 5.2, travel to and from residential or nursing homes are not within the scope of this policy). This applies in all but exceptional circumstances.

7. Aims and underpinning principles of the policy

These are to be understood within the context of national policy and legislation (see section 4).

7.1 Be person-centred

Support plans reflect the way that people wish to live their life, pursue their interests, and achieve their aspirations. The client is supported to identify outcomes for the coming 12 months and the support needed to achieve them. If assessment shows that travel assistance is required, the form it takes will reflect the skills and abilities of the individual.

7.2 Promote independence through developing skills and the use of technology-enabled support

Local authorities have a duty to support people to be as independent as possible. People who use AWHP services will be supported to develop skills through various approaches that support an individual's strengths. This may be in the form of travel training or supporting a person to use technology that can support journey planning and travel. See Appendix 1 for definitions.

7.3 Promote choice and control

To broaden the choices available to people that are required to travel to a service that meets their eligible need by ensuring they have the right information at the right time. This information could include details of community transport.

7.4 Support the wellbeing of individuals and their carers

The local authority has a responsibility to promote individuals' and their carers' wellbeing which includes people's ability to have control over their everyday lives. This policy supports wellbeing by ensuring that assessors and decision makers take a strength-based approach when considering travel options.

7.5 Support people to be part of their local community

It is Surrey County Council's AWHP vision that people are connected to their local communities. The policy supports this vision with the expectation that people attend services/activities/occupations that meet their needs that are closest to their home.

7.6 Promote Surrey County Council values

[Surrey County Council's Values](#) can be viewed online.

7.7 Support value for money and better outcomes

The council has a duty to protect the public funds it administers, but still ensure the best outcomes for its residents. The aim of the policy is to ensure that people's assessed needs can be met by using the most appropriate best value method of travel for the individual.

7.8 Promote sustainable and green methods of travel

Surrey County Council is committed to delivering on a net carbon ambition by 2050 with reduction targets against 2019 levels of 46% by 2025, 67% by 2030, and 80% by 2035. This policy supports this ambition as it ensures that the individual and assessor explore various forms of travel and support methods before a taxi may be considered.

8. Principles behind consideration for travel support

The assessment of need for travel support provision will be an element of someone's care needs assessment, i.e. no service will carry an automatic entitlement to travel support. (See Appendix 1 for definitions of travel support).

- 8.1 Part of the adult social care needs assessment process will consider what support, if any, is needed. There may be more than one solution or option available and so each journey needs to be considered separately, as part of a person's adult social care support plan. The assessor will complete a travel risk assessment if appropriate.
- 8.2 If the person has a family member or friend who helps with their care, the council will involve them in the assessment and support planning process, and they will be offered a carer's needs assessment.
- 8.3 If the individual has a Motability vehicle there is an expectation that the Motability vehicle will be used to meet the individual's transport needs. If the vehicle is driven for them then a carers assessment will be offered to the person supporting. No petrol costs or other expenses will be considered for funding by the council.
- 8.4 The use of direct payments will be explored as part of an individual's support planning.
- 8.5 If transport assistance is provided by the council this will be kept under regular review and may be subject to change. This is because individuals may develop more independence and achieve outcome goals which means that other travel options may be available to them. It is the ambition of the council to support people's independence and to enable people to connect and stay connected to their local community.

- 8.6 The time that a person will be expected to travel in a vehicle will be determined on an individual basis.
- 8.7 If a person has been offered a travel solution, but this has been declined by the individual, the council may not pay the individual's preferred choice of transport.
- 8.8 If eligible the type of transport assistance offered will be that which enables a person to travel safely and is the most cost effective." E.g. shared taxis.
- 8.9 Transport is a chargeable service, which is subject to a financial assessment. The financial assessment will look at how much, if anything, a person is required to pay and will be carried out in accordance with the council's [Charging policy for Adult Social Care services updated 2023](#).

9. Proximity

- 9.1 The council has a duty to ensure best value for money. Where a person is eligible, transport assistance will only be provided to the closest available service that meets their eligible needs.
- 9.2 In line with the council's Community Vision for Surrey in 2030, and with the Care Act 2014, everyone will be supported to be part of their community; we will therefore offer the closest available service/activity/occupation that meets their eligible need. If the individual chooses a different option that is further away from their home, the council may not meet the extra travel cost.
- 9.3 Depending on the client's location, the closest appropriate service may be in a neighbouring county.

10. Transport for young adults transitioning from children's services

- 10.1 In supporting younger adults along their pathway to adulthood, determining the best way to support the individual around travel support options and outcomes will be addressed via support planning with an AWHP care practitioner.
- 10.2 This support planning will consider how best to promote independence and inclusion and not increase the young person's dependence on others. Support planning will not focus on people's deficits but will focus on individuals' strengths (including personal strengths and social/community networks).
- 10.3 Travel assistance for young people aged 18-25 who have an Education, Health and Care Plan (EHCP) is outlined in the [post 16 transport policy](https://www.surreycc.gov.uk/schools-and-learning/schools/transport/16-plus/travel-assistance-to-school-or-college-for-students-aged-16-25)<https://www.surreycc.gov.uk/schools-and-learning/schools/transport/16-plus/travel-assistance-to-school-or-college-for-students-aged-16-25>.

11. Complaints process

It is the aim of AWHP to ensure that all decisions are made within the parameters of the legal policy that we work within. We will always aim to deliver the best possible service, but sometimes things go wrong, or we may fail to meet your expectations. Making a complaint does not mean that you will receive less help from us in future or that your complaint will cause difficulties for you. We can learn a lot from complaints, so we welcome your feedback.

[Information about how to complain](#) about Adult Social Care is available online or you can also contact the person or team that delivers the service you wish to complain about.

Appendices

Appendix 1:

Definitions

Travelling My Way

This is a programme that will support an individual to travel independently to the service/activity/occupation that meets their assessed eligible need. This may be walking, buses, trains, cycling (bikeability training) or a combination of these. Learning these skills may also benefit an individual's life and enable them to independently access their local community when they choose to do so.

Technology-enabled care and support

The use of technology to support an individual with journey planning and personal coping methods for distress and anxiety. Depending on the tech. package used, families and carers may also be able to track the individual's journey with their authorisation which can further give assurances to the carer and person receiving adult social care support.

Community transport

This is transport that is provided by district and boroughs and varies across the county. People may be able to use their bus passes. Further details can be found by searching [Dial-a-ride Surrey County Council](#) or by visiting [Connect to Support Surrey](#).

Volunteer car schemes

These are transport schemes are run by volunteers in the community and their criteria varies across the county. All these schemes can be found on [Connect to Support Surrey](#).

Direct payments

Direct payments can be used by the individual to source travel or transport themselves using the sum agreed in the persons support plan.

Motability vehicles

An individual who receives the higher rate mobility part of Personal Independent Payment (PIP) /Disability Living Allowance (DLA), Armed Forces Independence Payment (AFIP) or War Pensioners Mobility supplement may choose to join the Motability Scheme. The individual must have 12 months left on their allowance. Individuals can exchange their qualifying mobility allowance for a new car, Wheelchair Accessible Vehicle (WAV), scooter or powered wheelchair.

There are two levels of the mobility component of PIP:

- Lower rate mobility component
- Higher rate mobility component

The [current rates of PIP](#) can be found online.

If a person has been awarded the higher rate mobility component of PIP/DLA or the Armed Forces Independence Payment (AFIP) or War Pensioners Mobility supplement they can choose to have a Motability car or vehicle. The individual must have 12 months left on their allowance and may choose to lease a vehicle, electric scooter or a powered wheelchair.

If an individual/appointee chooses to lease a car through the Motability Scheme, the scheme states that 'your vehicle needs to be used by the disabled customer or for their benefit'.

Taxis

Taxis are sometimes procured by Surrey County Council if a person has been assessed as requiring travel/transport support. Regular taxis can be paid for via a direct payment if this has been agreed on their support plan or procured by the council via the Surrey Schools Transport Assessment Team (SSTAT). If appropriate and people are travelling to the same location and live near to each other, sharing a taxi may be considered.

Day service transport

Day services may offer transport to their service which could be paid for by adult social care if there is an eligible need.

Surrey Connect: On Demand Bus Service

This is a digital on demand bus service that can be booked online known as a [Surrey Connect Digital Demand Responsive Transport](#) solution, that is available in Surrey. It is a safe and reliable bus sharing service that will connect you to your local community. This is available in Mole Valley, Cranleigh, Farnham, Longcross, North & West Guildford and Tandridge.

Appendix 2: Additional information

Bus passes

You may be eligible for a free bus pass if you're a Surrey resident with an eligible disability or you are a Surrey resident who is 66 or older.

A bus pass can be applied for online or by appointment in any participating Surrey library.

Bus passes are valid from 9.30am until 11.30pm Monday to Friday and anytime at the weekend and bank holidays. Some bus companies offer a concessionary rate to bus pass holders before 9:30am; this will have to be checked on the bus providers' website for the most up-to-date information.

If the person requires support to access the bus, you may be eligible for a companion pass. This pass entitles you and your companion to free travel within Surrey. If you travel outside of Surrey your companion may be asked to pay. To qualify for a Companion Permit (identified by a +C on your pass), you will need to provide a letter from either social care services, Sight for Surrey or a medical professional involved in your care, stating that you require assistance to travel. Alternatively, please supply a copy of your PIP with 12 points for the "Planning and Following a Journey" activity.

Further information about [Surrey bus passes](#) is available online.

Alternatively, you can contact Surrey County Council as follows:

- **Availability:** 9am to 5pm, Monday to Friday
- **Telephone:** 0300 200 1005
- **Textphone (via Relay UK):** 18001 0300 200 1005
- **Text (SMS):** 07527 182 861 (for the deaf or hard of hearing)
- **British Sign Language:** [Sign Language Video Relay Service](#)
- **Email:** freebuspass@surreycc.gov.uk

Buses

If you are aged between 18-20 you may be eligible for a [Surrey Link card](#). This card gives you 50% off the adult fare for any journey starting and ending in Surrey.

Blue Badge

People who receive PIP and receive 8 points OR MORE in the 'moving around' descriptor or those people who receive 10 PIP points in the 'planning and following a journey' descriptor and the applicant cannot undertake any journey because it would cause overwhelming mental distress are automatically entitled to a Blue Badge. An application will still have to be completed. The council website has more information on the [Blue Badge scheme](#), eligibility criteria and how to use your blue badge and includes a video showing how to make your application.

Hidden disabilities

If people have a hidden disability, there are several different cards that are universally recognised by organisations including bus providers that can be used to indicate to the driver that the person has a hidden disability.

Sunflower lanyard

If you have a sensory loss, a physical disability that is not obvious, autism, a learning disability, anxiety or any other mental health condition, you can apply for the [sunflower lanyard](#).

ARRIVA Journey Assistance Card

These can be downloaded and printed. The [Arriva Journey Assistance card](#) can be used to indicate that a person has a disability and/or what type of disability or can be used to indicate where a person may want to alight the bus.

Helping Hand assistance card

Surrey County Council has worked alongside Brighton and Hove Council and other key stakeholders to produce the [Helping Hand assistance card](#). The card is helpful for people with hidden disabilities and holds a brief written instruction that can be shown to the driver when boarding the bus.

People can apply for a [Helping Hand assistance card](#) online.

Alternatively, you can contact:

- **Telephone:** 01273 886200
- **Textphone (via Relay UK):** 18001 01273 886200
- **Text (SMS):** 07583 051915 (for the deaf or hard of hearing)
- **Email:** info@buses.co.uk

Trains

There are several rail cards available that can enable people to receive a 1/3 off eligible journeys. The card is for one year and can be renewed annually. To find out what card you are eligible for, more information is available online at [trainline](#). Please note that there may be a charge for the card.

Annex 2- Summary of Market Engagement Feedback regarding the ELO Commissioning Plan (further detail available upon request)

User engagement was started in January 2023:

Learning Disabilities and Autism: We spoke to people via the:

- Surrey Peoples Group
- Valuing People Groups (included carers)

People told us that they enjoyed going out in their local community, and making and maintaining friendships was important to them. They liked the support that they received to access the community; however, they wanted to have more choice in the decisions that were made regarding their support and the activities that they did. Though they enjoyed going out and about, it was important to them that they had access to a place if they felt unsafe or it was a cold wet day. This need could be met by an increase in and knowledge of the locations of safe spaces, or the use of community hubs. Some services also have buildings from which they meet at, therefore offering a hybrid model of care.

People also said that they would like to be more independent and have more choice and control about the journeys they make and the activities they can attend, but poor transport links or lack of travel training meant they were unable to do this. The development of a Travel Training offer will go some way to mitigate this, along with improved knowledge regarding the different community transport options available, however the improvements to bus links is out of scope for this tender.

People wanted to be able to work and have more opportunities to volunteer as well as have more control over the times that they can stay out. There was a lack of staff to support people to go out in the evening and if they were able to be out after 8pm a lack of activities.

Summary of Feedback from Service providers

Engagement with the provider market has been ongoing throughout 2024 in the form of market engagement events.

- In November 2024, a Request for Information (RFI) was issued to the market to gain understanding of current market capabilities, capacity and appetite to deliver the models of care.
- In December 2024 50 different providers engaged in Focus groups, contributing to in-depth conversations focusing on the different ELO service models.

The following is a summary of the main points from service providers as part of this market engagement activity:

Centre based support

- Models of delivery are generally similar in that they have hubs where a variety of activities are offered, and support and activities also take place in the community. A small number of providers felt that the current offer does represent diversity, and there

were examples of more diverse offers including nightclub events, theme park trips and drama groups.

- A key theme that emerged is that the ratio of time spent within the community shouldn't be the focus, but rather the outcomes for the individuals attending the services.
- Ideas from providers on how the commissioning approach could facilitate community inclusion include, a focus on outcomes that promote active participation in local life, such as time spent in community settings or involvement in local groups.
- Also need to look at how communities can be more accessible

Independent Travel Training

- The RFI found that 9 of the Surrey providers currently offer travel training, 12 would like to offer or continue to offer it in the future. There was also interest in the follow up discussions with many of the providers indicating they would like to deliver this as part of their service.
- Providers felt that the best model for this support is multiple providers across the county was, with very little favour for one county wide provider or one provider per area.
- Important for providers to have support from Occupational therapist (OT) role to ensure appropriate right referrals come through and to provide some oversight of the process.

Community and Life skills (Outreach)

- Feedback from providers is that the term 'outreach' is broad and can encompass aspects of service delivery including supported volunteering, employment support and can also be delivered via group activities or smaller subgroups or sometimes on 1:1 basis.
- A clear definition for outreach and day services may be needed to clearly distinguish between the two offers.
- There is interest in delivering outreach services from most providers that responded to the RFI
- Many providers believe there is an unmet need for evening and weekend sessions, acknowledging the importance of a flexible offer that allows supported individuals to socialise in the evenings, and provides crucial respite for carers.

Supported Employment

The RFI showed that 6 of the Surrey providers currently offer support to secure and retain paid employment.

- Most providers commented that while some support can be delivered in small group sessions, the delivery model needs to be for 1:1 support mainly due to the varying communication needs and learning rates, and the fact that support is facilitated by having a trusting relationship with a support worker with customised job coaching and training.
- Providers highlighted that while job carving benefits people with severe to moderate learning disabilities, employers are less likely to be offering this as roles become broader and multitasked. This would require robust employer relationship management and employers willing to create job (carving) opportunities.
- Most providers that responded agree that there is a gap in the market with supported employment and more services are needed.
- There is also a gap in the market for employers willing to employ people with disabilities. It was suggested that the Council could play a role in 'educating' employers on benefits of inclusion, and employing people with disabilities.

ANNEX 3 – Travel Policy consultation feedback

1. The Impower Staff Survey, completed in 2022, highlighted the need for a Travel Policy. At this time there was guidance available to staff members however 73% of staff who completed the survey were unaware of this. The lack of a policy also led to inconsistent decision making and created a lack of confidence for staff as they had no formal document to refer to or refer residents to.
2. A new staff survey was sent in early 2023 to capture up to date views of Adult Social Care staff. This confirmed the information received via the Impower report.
3. A research survey was sent to targeted user groups for all cohorts to understand what the main concerns would be regarding the Travel Policy and to understand their awareness of Adult Social Care travel support.

It was identified that 64% of respondents did not know or were unsure where to find out what travel options were available and what support they could get. To help mitigate this links and information have been added to the policy to help people find out the options available to them in the community, and what other support could be available to help them with their journeys. Focus Groups were held with people that use services to discuss travel information. This was feedback to the Freedom to Travel Programme, concerning things such as inaccessible bus timetables and difficult booking systems for community transport.

Through the survey we explored people's views regarding the use of Motability Vehicles, more people agreed that the use of a Motability Vehicle to get to the service that meets the persons eligible need should be explored and used unless it is assessed that there is a reason that this is not possible. The use of Motability Vehicles has been raised as a contentious issue by professionals when exploring their use with people.

4. Formal Public Consultation was open for 10 weeks and closed on 31 December 2024, 75 responses were received. It was widely promoted through social media channels and through stakeholder and user groups. The Consultation was available in all accessible formats and easy read.

The questions focused on the themes of the policy which are strength-based practice, promoting independence, choice and control. Most people agreed with this approach and saw travel training and the use of community and public transport as methods to support this. The survey explored the use of shared vehicles to reduce the number of single journey taxis, and the majority of people agreed with this. This is included within the policy and the staff guidance but had not previously, this will be a change for staff and how they explore the use of taxis if this is the only appropriate method of travel.

From the feedback received during the consultation there have been no contentious themes which would mean any changes to the policy. The final report will be available by Cabinet on 28 January 2025, this report will include any qualitative data.

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