Home to School Travel Assistance Learning Review – November 2022

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Executive summary

- Approximately 160,000 pupils attend education settings each day in Surrey. A small proportion (around 9,600 or 6%) qualify for home to school travel assistance (H2STA). Provision of travel assistance is statutory in certain circumstances, as set out in the Education Act 1996.

- Over several years the Council has sought to continuously improve the way that H2STA is delivered, focussing not only on the experience of families accessing and using the service but also on making it sustainable in the longer term.

- Despite the improvements that have been made to date, the experience of families applying for travel assistance in the lead up to the 2022/23 academic year fell short of the standards the Council holds itself to deliver.

- A learning review was commissioned to look into what happened. Five themes emerged from the review and are described in this report, along with 50 corresponding recommendations.

Figure 1: H2STA learning review in numbers

8
weeks

38
interviews

6
drivers of 2022 pressures

12
interdependent parts of the end-to-end H2STA process

5
learning themes

50
recommendations

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Background to the learning review

Purpose of the review

The experience of families applying for home to school travel assistance (H2STA) in the lead up to the 2022/23 academic year fell short of the standards the Council holds itself to deliver.

In September 2022, the Chief Executive's Chief of Staff and the Chief of Staff to the Executive Director of Children, Families and Lifelong Learning (CFLL) were asked to lead a learning review to:

- Capture a comprehensive picture of the pressures that materialised, the key drivers of those pressures, and the actions that were taken to mitigate the pressures.

- Confirm the arrangements that were in place to manage applications and enquiries.

- Look back at how pressures compared to the previous school years.

- Develop recommendations to help the Council ensure that we learn from the experience of this year and are well prepared for the 2023/24 school year and beyond.

- Inform and support prioritisation for the H2STA transformation programme.

Methodology

The learning review was completed over an 8-week period between late-September and mid-November 2022. The diagram below sets out the key stages of the review.
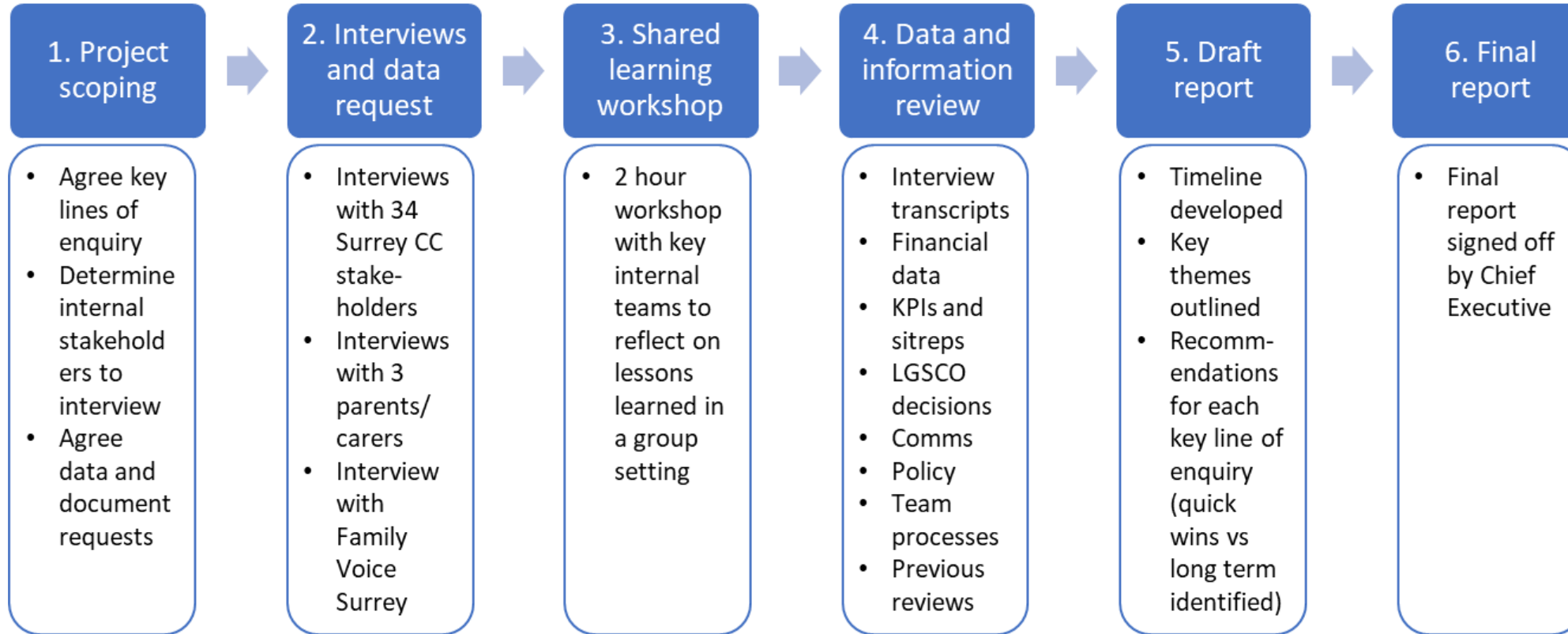
1. Project scoping	2. Interviews and data request	3. Shared learning workshop	4. Data and information review	5. Draft report	6. Final report
• Agree key lines of enquiry • Determine internal stakeholders to interview • Agree data and document requests	• Interviews with 34 Surrey CC stake-holders • Interviews with 3 parents/carers • Interview with Family Voice Surrey	• 2 hour workshop with key internal teams to reflect on lessons learned in a group setting	• Interview transcripts • Financial data • KPIs and sitreps • LGSCO decisions • Comms • Policy • Team processes • Previous reviews	• Timeline developed • Key themes outlined • Recomm-endations for each key line of enquiry (quick wins vs long term identified)	• Final report signed off by Chief Executive

Figure 2: learning review methodology

Drivers of pressures in 2022

In 2022, the provision of H2STA was affected by at least six factors coalescing around the same time
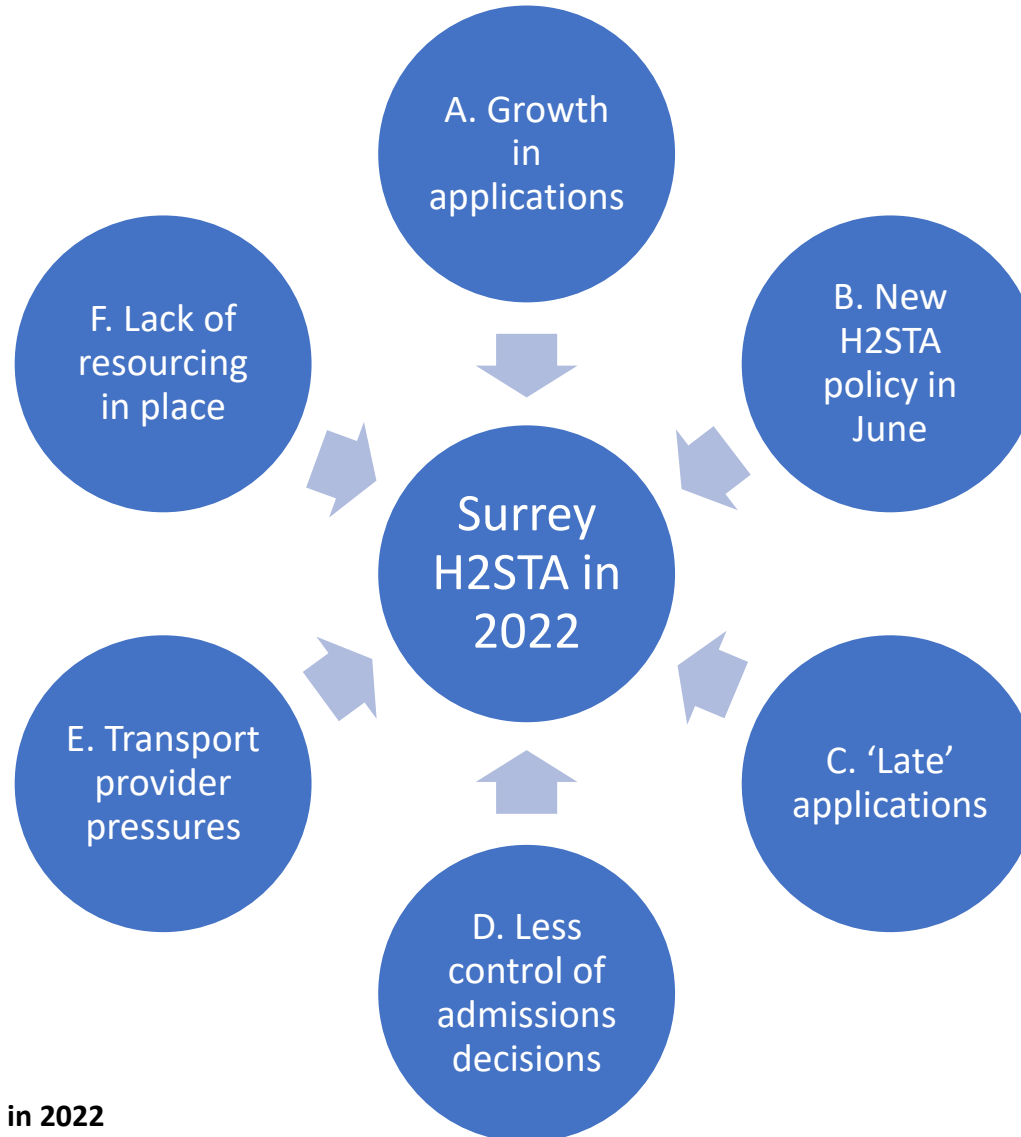
Figure 3: factors impacting H2STA provision in 2022

In 2022, the provision of H2STA was affected by at least six factors coalescing around the same time

Factor A – growth in applications

The Council received an additional 21% of applications for H2STA in 2022 than the previous year.

Discounting a year during Covid, there has been an upward trend in applications from 2017 to 2022.

Factor B – new policy in June

The Council's refreshed H2STA policy was published on 14 June 2022 and applied to all applications from 6 May 2022.

Further work to prepare to implement the policy would have been beneficial.

Factor C – 'late' applications

All applications were considered 'late' after 6 May – the cut-off point at which the H2STA delivery team could guarantee transport arrangements for September 2022.

Factor D – less control of admissions decisions

Knowing when to expect travel assistance applications has become more challenging for the Council in recent years as more schools manage their own admissions processes.

Factor E – provider market pressures

The transport provider market was affected by a national driver shortage and escalating fuel costs, which made it more challenging for the H2STA team to source suitable transport for children and young people.

Factor F – resourcing

At the peak of transport applications in the summer of 2022, there were not enough trained resources in place across the end-to-end H2STA process to respond to applications at the rate required.

Impact of 2022 pressures

By mid-August 2022, the Council found itself struggling to address the build-up of:

- Applications yet to be assessed for eligibility.

- Applications that had been assessed as eligible, awaiting arrangements to be put in place.

- Enquiries and complaints to the corporate contact centre, CFLL Customer Relations Team, admissions and H2STA teams, members, MPs and senior officers.

- These were primarily from parents and carers who had either: not had their school place confirmed; not received an outcome to their H2STA application; not had their child's travel arrangements confirmed; or disagreed with the outcome of any of the above.

- Stage 1 and 2 appeals about the outcome of an application with which parents/carers were dissatisfied.

Impact on children missing education

The Council's policy during the 2022 peak pressures in transport provision was that: "*No child should be missing their education while they wait for a decision on transport provision or agreed transport to be organised. It is the school's responsibility to ensure that the child continues to receive education. We expect the school to work with a family on the best means of delivering education, which could include remotely, during this interval. Schools are well-practised in delivering remote education as a consequence of the Covid-19 pandemic*".

However:

- Some children were reportedly unable to benefit from remote learning due to specific conditions.

- Recording was not systematic about how many children were unable to attend school due to lack of transport, and this information could not be reported when requested to the Local Government and Social Care Ombudsman.

- There was no robust and embedded process for automatically identifying and triaging transport applications for vulnerable children and young people, including looked after children and care leavers. This meant applications for some looked after children were not fast tracked as quickly as possible.

Impact on the workforce

- During the peak of the pressures in 2022, the teams across the Council working to deliver H2STA became stretched and overwhelmed, with a number of key staff absent for reasons including stress and sickness, further impacting the pace of recovery.

- The Council has a comprehensive wellbeing offer for all staff, but due to the increasing need and nature of support required, colleagues from the People and Change directorate initiated a multi-disciplinary 'working group' to take forward more targeted interventions.

- Additional resources were offered to the H2STA service on daily operational response calls, to address resource gaps. While some of these resources were drawn upon, others were rejected on the basis that the training required to upskill staff would detract from the operational work the transport team needed to do.

"I felt incredibly sorry for them because they must have had every parent in Surrey with children screaming at them"
A parent interviewed

The response to the 2022 pressures

About the response

- In mid-August the H2STA service recognised that the emerging pressures were far greater than anticipated and began to put plans in place to address them.

- A formal cross-organisation response operation was stood up on 6 September 2022 and members were advised on 7 September 2022.

- The response team brought together staff from the corporate contact centre, the CFLL customer relations team, SEND and mainstream admissions teams, the H2STA service and senior managers.

- This group met daily to oversee additional resources, communications and activity that needed to be in place to address the pressures. The group reported progress on tackling the pressures to the Chief Executive via a daily situation report.

- By 28 October 2022 the H2STA team had put transport arrangements in place for all children that had been deemed eligible before 15 October 2022 and had processed all travel assistance applications that were received before 15 October 2022, bringing the service demands in line with 'usual' activity for this point in the school year.

- Enquiry volumes handled by the corporate contact centre and CFLL customer relations team had also dropped significantly and returned closer to 'normal' levels.

Timeline of developments and interventions in 2022 (1/2)

Timing	Activity
22 February 2022	• Public consultation on changes to Home to School Travel Assistance Policy opened.
31 March 2022	• Public consultation on changes to Home to School Travel Assistance Policy closed. 694 stakeholders had responded to the consultation survey.
April 2022	• Internal audit report published into SCC's home to school transport service during 2021/22, with a 'partial assurance' judgement. New interim Head of Service appointed for Surrey School Travel and Assessment Team (SSTAT).
26 April 2022	• Cabinet approved changes to the Home to School Travel Assistance Policy and agreed the proposal to produce an enhanced Post 16 Policy Statement.
6 May 2022	• Deadline for applications to be processed under 'old' policy. Applications received after this date were treated in line with refreshed policy.
14 June 2022	• Enhanced annual Post-16 travel assistance policy statement published. New policy begins to be implemented. • Transformation Scope Review undertaken between SSTAT and Twin Track, recognizing that actions needed to be taken to address key risks.
15 August 2022	• SSTAT meet to discuss the emerging pressures in the service. • Home to School Transport parent guide published in conjunction with Family Voice.
17 August 2022	• Briefing note circulated by interim Head of Service to some stakeholders within the Council's Children, Families and Lifelong Learning (CFLL), Customer & Communities (C&C) and Twin Track teams, highlighting growing pressures and setting out planned next steps.
September 2022	• Councillor inboxes full after the summer break with enquiries from affected families.
5 September 2022	• Chief Executive (CEX) visited corporate contact centre, witnessed high call volumes regarding H2ST and requested assurances from relevant Executive Directors about response. • Executive Directors for C&C and CFLL asked their teams to stand up a cross-directorate response operation.
6 September 2022	• Outstanding mainstream admissions applications (694) and H2STA applications (825) reach peak. • Cross-directorate operational response team had first daily meeting (daily until reduced to twice weekly in late September).
7 September 2022	• Briefing note circulated to Leader and Lead Cabinet Members. • All councillor briefing circulated.

Timeline of developments and interventions in 2022 (2/2)

Timing	Activity
8 September 2022	• First daily situation report provided to CEX tracking the developing situation. Provided daily thereafter until 27 September 2022, when frequency reduced. • Statement published on social media, on Council external website and on the Local Offer. • List of additional resources that could be deployed from the wider CFLL directorate provided to SSTAT.
12 September 2022	• Internal comms sent to SEND casework teams. • External comms issued to Family Voice.
15 September 2022	• Mainstream admissions team reduces volume of outstanding applications to 0 (from peak of 694).
16 September 2022	• Internal comms sent to SEND Advice Surrey.
23 September 2022	• Terms of reference for lessons learned review agreed and review begins.
27 September 2022	• Briefing provided to CEX on the status of H2STA pressures.
30 September 2022	• Briefing provided to CEX on the latest status of H2STA pressures.
3 October 2022	• Cabinet members provided with H2STA update before select committee.
10 October 2022	• Briefings provided to CEX, Leader and CMs and opposition leaders in advance of Council meeting.
12 October 2022	• Consultation on planned restructure of the SSTAT begins.
28 October 2022	• Returning to BAU: HST TA team have transport arrangements in place for all children that were assessed and deemed eligible before 15/10 and have processed all travel assistance applications received before 15/10/22.
15 November 2022	• First meeting of refreshed Home to School Transport Oversight Board.
15 December 2022	• Final report presented at CFLL Select Committee meeting.

Lessons learned from the 2022 experience
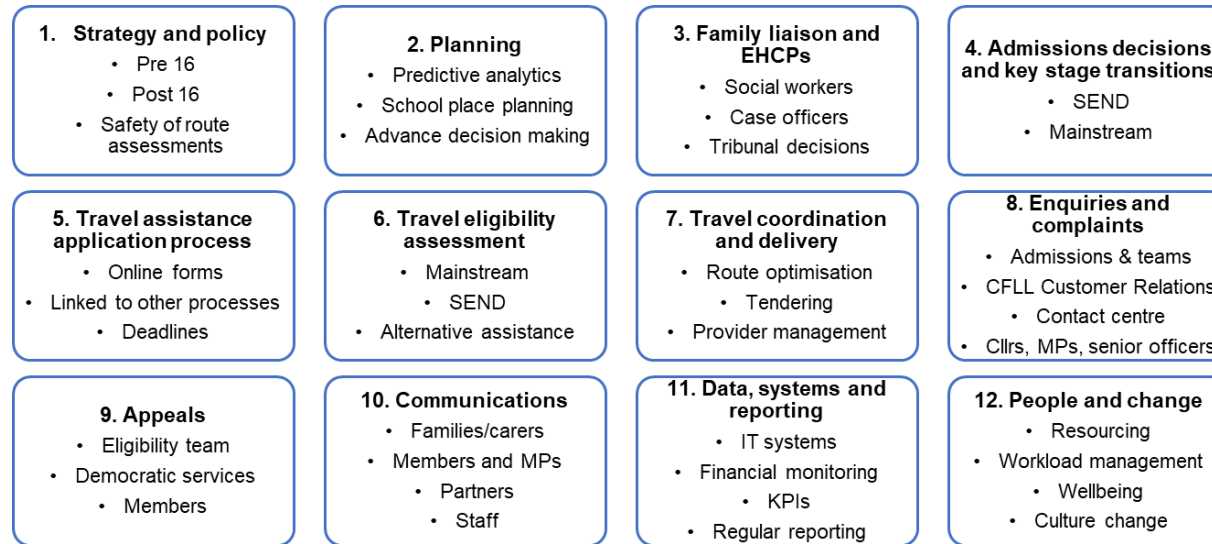
Five themes of learning emerged from the review, requiring action to address
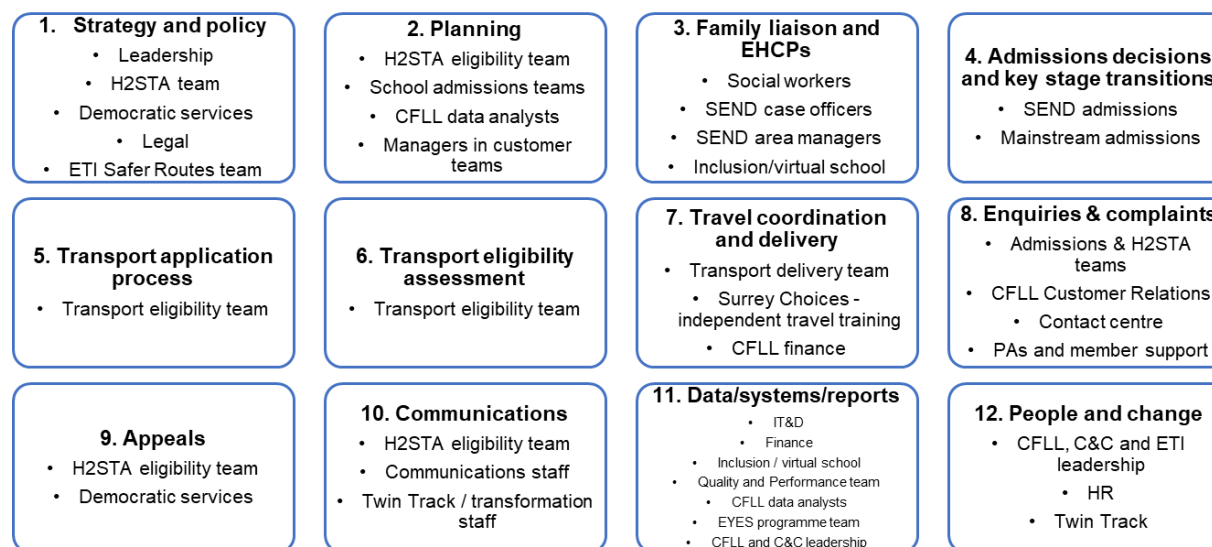
1 Refine and join up the end-to-end H2STA process

2 Transform data, digital systems and automation

3 Strengthen performance management and quality assurance

4 Enhance and extend communications and engagement

5 Explore alternative models of transport delivery

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1. Refine and join up the end-to-end H2STA process

Figure 4: Examples of activities within the H2STA end-to-end process

1. **Strategy and policy**
   - Pre 16
   - Post 16
   - Safety of route assessments

2. **Planning**
   - Predictive analytics
   - School place planning
   - Advance decision making

3. **Family liaison and EHCPs**
   - Social workers
   - Case officers
   - Tribunal decisions

4. **Admissions decisions and key stage transitions**
   - SEND
   - Mainstream

5. **Travel assistance application process**
   - Online forms
   - Linked to other processes
   - Deadlines

6. **Travel eligibility assessment**
   - Mainstream
   - SEND
   - Alternative assistance

7. **Travel coordination and delivery**
   - Route optimisation
   - Tendering
   - Provider management

8. **Enquiries and complaints**
   - Admissions & teams
   - CFLL Customer Relations
   - Contact centre
   - Cllrs, MPs, senior officers

9. **Appeals**
   - Eligibility team
   - Democratic services
   - Members

10. **Communications**
    - Families/carers
    - Members and MPs
    - Partners
    - Staff

11. **Data, systems and reporting**
    - IT systems
    - Financial monitoring
    - KPIs
    - Regular reporting

12. **People and change**
    - Resourcing
    - Workload management
    - Wellbeing
    - Culture change

Figure 5: Examples of teams involved in the H2STA end-to-end process

1. **Strategy and policy**
   - Leadership
   - H2STA team
   - Democratic services
   - Legal
   - ETI Safer Routes team

2. **Planning**
   - H2STA eligibility team
   - School admissions teams
   - CFLL data analysts
   - Managers in customer teams

3. **Family liaison and EHCPs**
   - Social workers
   - SEND case officers
   - SEND area managers
   - Inclusion/virtual school

4. **Admissions decisions and key stage transitions**
   - SEND admissions
   - Mainstream admissions

5. **Transport application process**
   - Transport eligibility team

6. **Transport eligibility assessment**
   - Transport eligibility team

7. **Travel coordination and delivery**
   - Transport delivery team
   - Surrey Choices - independent travel training
   - CFLL finance

8. **Enquiries & complaints**
   - Admissions & H2STA teams
   - CFLL Customer Relations
   - Contact centre
   - PAs and member support

9. **Appeals**
   - H2STA eligibility team
   - Democratic services

10. **Communications**
    - H2STA eligibility team
    - Communications staff
    - Twin Track / transformation staff

11. **Data/systems/reports**
    - IT&D
    - Finance
    - Inclusion / virtual school
    - Quality and Performance team
    - CFLL data analysts
    - EYES programme team
    - CFLL and C&C leadership

12. **People and change**
    - CFLL, C&C and ETI leadership
    - HR
    - Twin Track

1. End-to-end process: recommendations (1/2)

The review identified a need for much greater coordination between the many activities and teams involved in H2STA...

	Recommendation	Short (in next month)	Medium (next six months)	Long (six months +)
1	Appoint a Senior Responsible Officer accountable both for the operational end-to-end process and for delivering transformation.	X		
2	Undertake a wider organisational design review to establish clear strategic leadership across the multiple teams that contribute to H2STA so that placement and transport decisions are made together, and that maximum value is achieved across budgets.	X		
3	Review the process whereby those continuing in the same school place over multiple years without changing needs are expected to reapply for transport, to determine whether reapplication is always required. Review the requirement for an annual re-application process post-16.	X		
4	Agree the circumstances under which emergency payments of travel allowances can be made and the process.	X		
5	Review the process for triaging transport applications for vulnerable children and young people and prioritising them for travel assistance including looked after children and those on child protection registers. Explore simple steps such as adding an additional box on the application form to indicate where the application relates to a looked after child or care leaver.	X		
6	Develop a flexible and agile end-to-end resourcing and training model to ensure that sufficient resources can be in place to address peaks in demand from next year, that business processes are robust and clear, and points of escalation are provided.	X		
7	Establish an officer-level operational end-to-end H2STA coordination board with defined terms of reference and responsibilities, to report into the officer-member H2STA oversight board.	X		
8	Review the reasons why no bikeability or driving lessons have been agreed as travel arrangements in 2022 and put plans in place to increase their uptake going forward.	X		
9	Agree a consistent policy on whether mileage reimbursement covers 2 or 4 journeys and implement changes in the finance system and in communications with parents and carers.	X		
10	Agree a process and timeframe for conducting bulk assessments of mainstream applications.	X		

1. End-to-end process: recommendations (2/2)

…As well as a need to review different parts of the process to ensure its overall effectiveness.

Recommendation		Short (in next month)	Medium (next six months)	Long (six months +)
11	Review the processes for stage 1 and stage 2 appeals to identify opportunities to simplify and improve timeliness of responses. Ensure the data and records are managed and accessible.		X	
12	Consider replacing the single application deadline for H2STA applications with multiple application cycles that enable parents and carers to apply at different points in the year. Move away from the term 'late' in communications, which is perceived to be pejorative, as there are different circumstances that lead to applications after the current once a year deadline.		X	
13	Extend the use of pre-approval mechanisms to enable applications to be processed faster, such as online eligibility checkers.		X	
14	Develop different pathways for making an application where we already know about the child's specific needs, for example via an EHCP or through the school admissions teams, to prevent parents from needing to apply separately.		X	
15	Review eligibility decision making processes around children attending pupil referral units.		X	
16	Explore further actions that can be taken to ensure SEND case workers have capacity and knowledge to liaise with families about travel assistance.		X	
17	Explore whether the final agreement of the EHCP could be automatically linked to the travel assistance application to streamline the process.		X	
18	Continue to embed and monitor wellbeing and support recommendations for the H2STA service via the CFLL People and Change working group.		X	
19	Deliver a staff engagement and training programme to help colleagues operate as one team across the end-to-end process and understand their shared accountability for service outcomes.		X	
20	Build travel assistance considerations into the Lifelong Learning Strategy, currently being co-designed with education partners and to be discussed with Cabinet on 31 January 2023.		X	

2. Transform data, digital systems and automation

The learning review identified a clear need for better data, shared digital systems and automation to support service delivery and easier access for customers to information.

Recommendation		Short (in next month)	Medium (next six months)	Long (six months +)
21	Build on prior digital discovery work to validate the current picture of systems and data across the end-to-end H2STA process.	X		
22	Progress initial trajectory modelling of the financial implications of rising demand for H2STA and the likely impacts of the refreshed H2STA policy on future budgets.	X		
23	Continue to roll out shared record management and information governance procedures that enable staff involved in the H2STA end-to-end process to share and record information effectively, and support business continuity.		X	
24	Review blockers to digital transformation and set out clear recommendations for leadership about how they can be addressed, for example if there is a dependency on prioritisation of H2STA system development in the IT pipeline for 2023/24.		X	
25	Twin Track to report on the full digital transformation required for H2STA including the cost and timeframes expected to integrate systems, digitise, and automate to support the end-to-end journey.		X	
26	Build in the costs of pupils who are receiving ITA, ITT and other alternative forms of travel assistance into existing Tableau reporting and analysis to track delivery.		X	
27	Put a process in place to provide greater assurance on the reconciliation between the Mobisoft information and SAP postings to ensure all elements are being picked up in financial reporting.		X	
28	Progress the integration of H2STA data and systems into the EYES / Single View of a Child system, to enable practitioners across the end-to-end process to understand each child's transport history.			X
29	Review and refine the use of the GOSS system, including to: improve usability, ensure there is a way to signal an ITA request at the point of application, ensure that notes on records do not affect accurate reporting, and that communications from GOSS contain correct dates and updated policy information.			X

3. Strengthen performance management & quality assurance

The learning review identified a need to review and improve finance and business processes, benchmarking, key performance indicators, and quality assurance.

	Recommendation	Short (next month)	Medium (six months)	Long (six +)
30	Review data and evidence including the take up of ITT, ITA and appeal outcomes to understand if the refreshed H2STA policy is on track to deliver the expected outcomes.	X		
31	Assess the cost of appeal decisions in relation to 2022/23 H2STA applications.	X		
32	Roles and responsibilities between finance and the service to be set out explicitly with expectations of insights and active engagement from the service along with appropriate challenge from finance on data, forecasting and budget controls.	X		
33	To support business continuity, document how to process applications, delivery, appeals, contacts, and complaints, and SLAs.	X		
34	Review training of stage 2 appeal panel members to quality assure the approach and materials. The training should equip panel members with a good understanding of the policy, the context, and the parameters for exceptional circumstances to be considered.		X	
35	Create a standard reporting suite and reporting framework, to engage key internal and external stakeholders about the performance of and developments in the service on an ongoing basis.		X	
36	Undertake further benchmarking to understand how the H2STA service in Surrey compares with peers and if there are further actions that can be taken to align with best practices across the county council network.		X	
37	Ensure a robust process is in place to record and report absences from education due to lack of transport provision.		X	
38	Introduce a system and process to centrally monitor, record and report on all appeal outcomes and their impact.		X	
39	Develop and embed clear and shared KPIs across the end-to-end process, so that they include visibility of school admissions, travel assistance applications, delivery, appeals, contacts, and complaints etc.		X	
40	Complete the cold case review of current transport cases, including end dates for provision. In doing so, assess whether provision will be extended or not upfront to avoid a need for families to reapply.		X	
41	Continue to deliver actions set out in the April 2022 internal audit of the service.		X	
42	Develop a culture of robust programme management, quality assurance and performance across the end-to-end process.			X
43	Review the equality impacts of the refreshed H2STA policy and the steps that have been taken in mitigation.			X

4. Enhance and extend communications and engagement

The learning review identified a need for much more extensive customer service and communication with families and carers.

	Recommendation	Short (in next month)	Medium (next six months)	Long (six months +)
44	Review and strengthen the communications that go out to families with EHCPs by linking them to the transport application process and accompanying parents' guide.	X		
45	Develop a comprehensive communications plan around H2STA to clearly set out the offer for parents and young people, manage expectations about what the Council can provide in line with the refreshed policy, and create the opportunities for a creative and mature dialogue with parents about transport options. The plan should include a focus on: • who needs to (re)apply and when, how to apply, and the application and appeals process(es). • encouraging families towards modes of transport that promote independence of children and young people. • how parents and carers can expect to be engaged in the process of decision making on eligibility. • providing clarity about the parameters of safety of route assessments. • involving SEND case workers and social workers in conversations about H2STA options with families in the course of their work. • developing the language around how we explain the role of the service and that of school partners in providing remote learning whilst transport can be arranged. • publishing and promoting clear service level agreements for the H2STA process. • greater use of outbound calling of parents and carers to deliver messages and engage wherever possible. • alternative communications channels and formats such as bite sized videos, social media and easy to read FAQs.		X	
46	Develop and implement professional and consistent template emails and letters for all communications.		X	
47	Create a single customer front door for H2STA to improve the experience of parents and carers in interacting with the Council about H2STA.		X	
48	Align customer relationship management systems (CRMs) and telephony systems across the corporate contact centre, CFLL Customer Relations team and within the service teams involved in enquiry handling, to enable business resilience, a consistent approach and more reliable monitoring of contacts.			X

5. Explore alternative models of delivery

The learning review identified a clear need to optimise procurement systems and explore alternative models of delivery, to encourage greater competition and increase choice and resilience of transport provision.

Recommendation		Short (in next month)	Medium (next six months)	Long (six months +)
49	Review the Dynamic Purchasing System (DPS) to identify further efficiencies and reduce exposure to market volatility.		X	
50	Take forward the Freedom to Travel transformation programme through Twin Track.		X	

Next steps

Next steps

- Recommendations from this learning review will be taken forward by the Home to School Travel Assistance Oversight Board, chaired by Councillor Clare Curran.

- The Home to School Travel Assistance Oversight Board will report on progress to the Select Committee.

Appendices

1 – Data and information analysed during this review

A large volume of information and data was reviewed including:

- <u>Interview transcripts</u> – from interviews with 38 stakeholders (34 staff, 3 parents/carers, and Family Voice Surrey)
- <u>Workshop outputs</u> – the outputs of the shared learning review
- <u>Financial data</u> – provided by SCC Finance colleagues
- <u>Key performance indicators (KPIs) and situation reports (sitreps)</u> - that had been used to track and report the progress of the operational response during the 2022 H2STA pressures
- <u>Local Government and Social Care Ombudsman (LGSCO) requests</u> for information from the service and decisions on H2STA-related cases
- <u>Communications</u> – that had been issued during 2022 to parents, the public, councillors, and staff in relation to H2STA
- <u>Policy information</u> – documentation relating to and records of official decisions about the Council's H2STA policy
- <u>Team processes, policies and procedures</u> – documents used by operational teams to manage work in relation to H2STA, where they were relevant to the review
- <u>Previous reviews</u> – as several reports had previously been undertaken that made recommendations about the changes needed to H2STA the outputs of those reviews were reviewed

2 – Surrey HTSTA applications by year
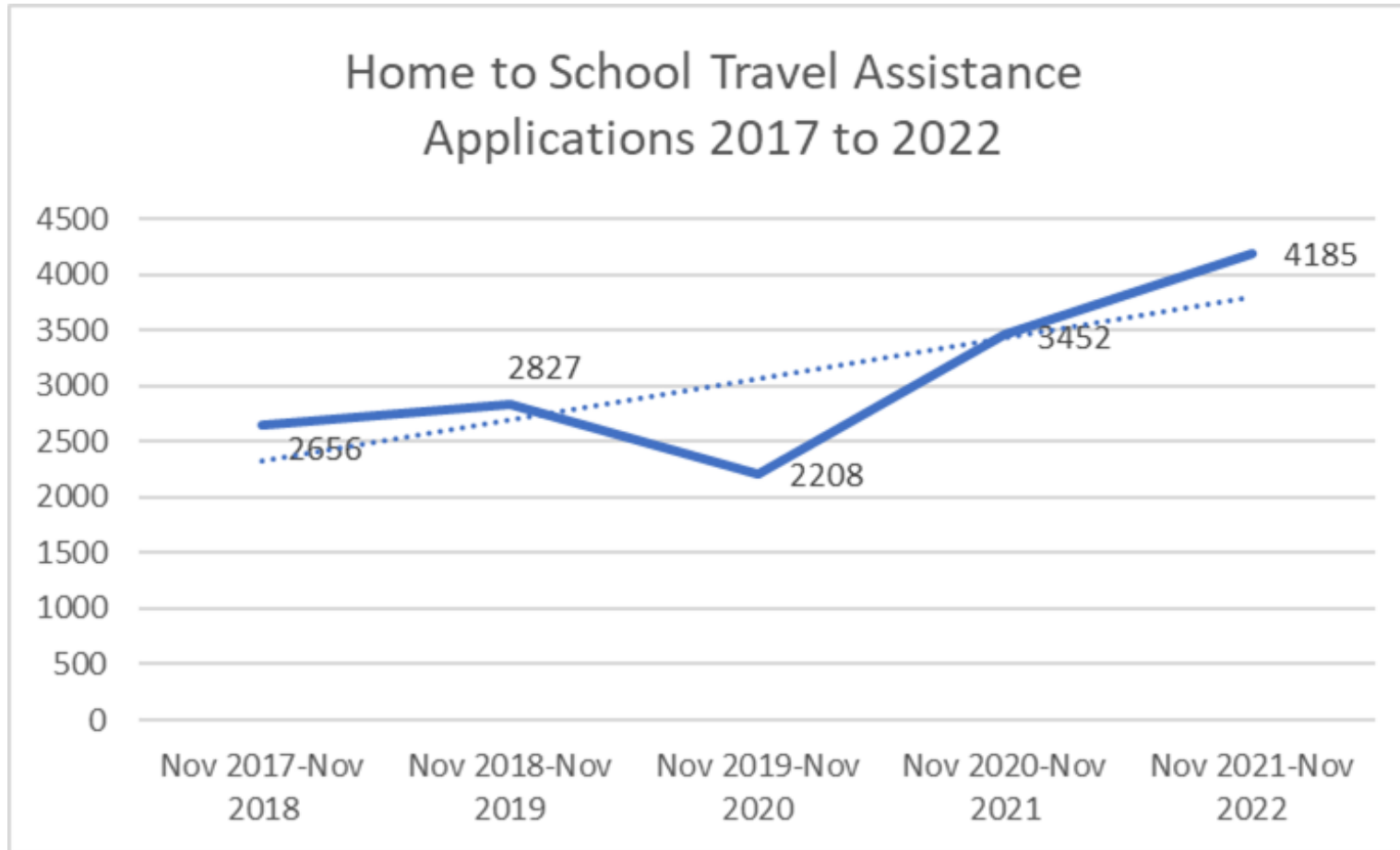
The H2STA team implemented a new SharePoint system in 2021 which enabled them to track applications by month from a system called Goss via SharePoint. As of 1 November 2022, records show that there had been a total of 4185 applications for home to school travel assistance related to academic year 2022/23. This is compared to 3452 applications received in the previous period to 1 November 2021 – a 21% increase. Evidence of application numbers prior to 2021 is more unreliable as this was kept on multiple Excel spreadsheets. Based on our analysis of those spreadsheets, the numbers of applications over the three years prior to 1 November 2020 have been included in the chart.
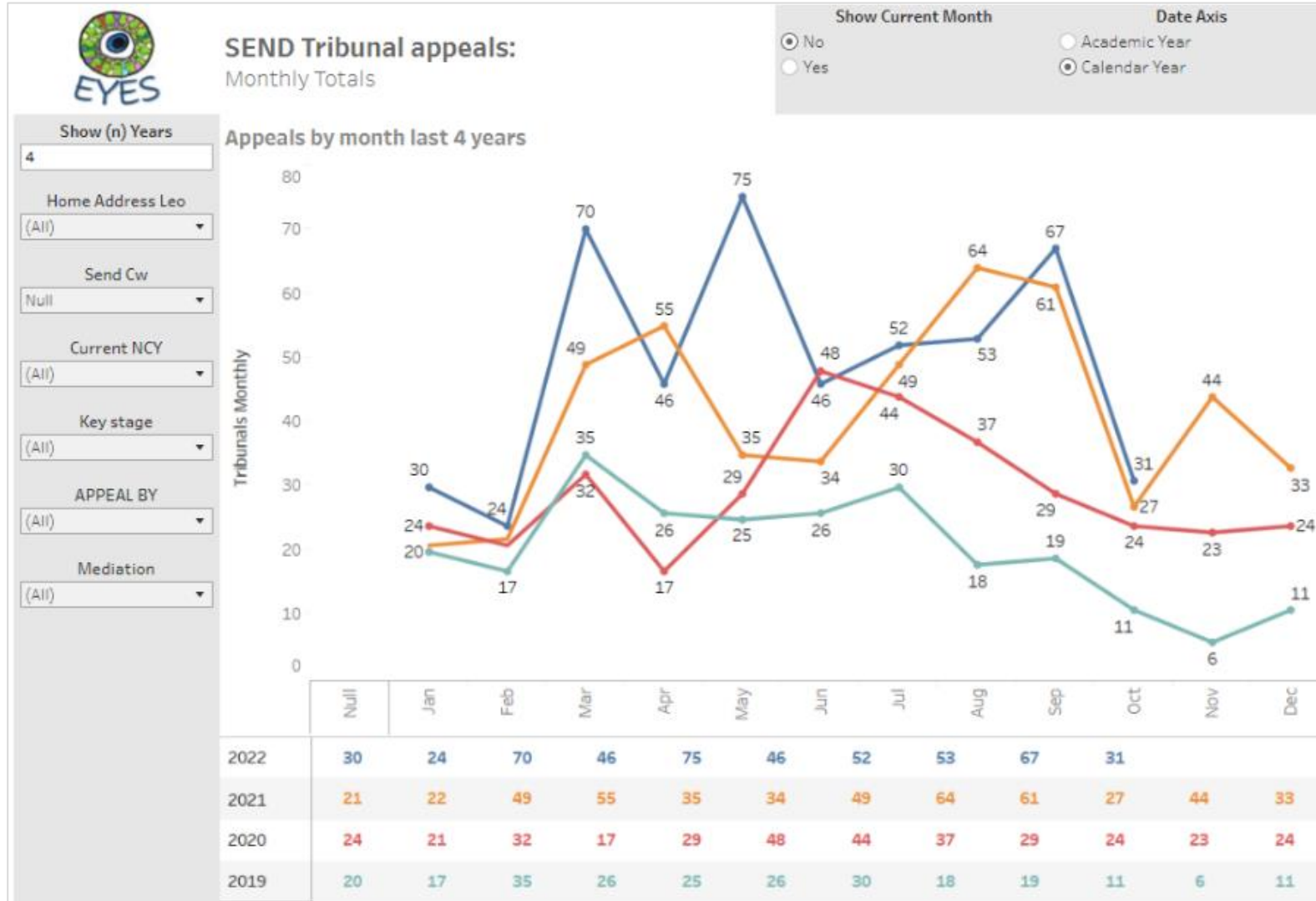
3 – Volume of H2STA applications received per month
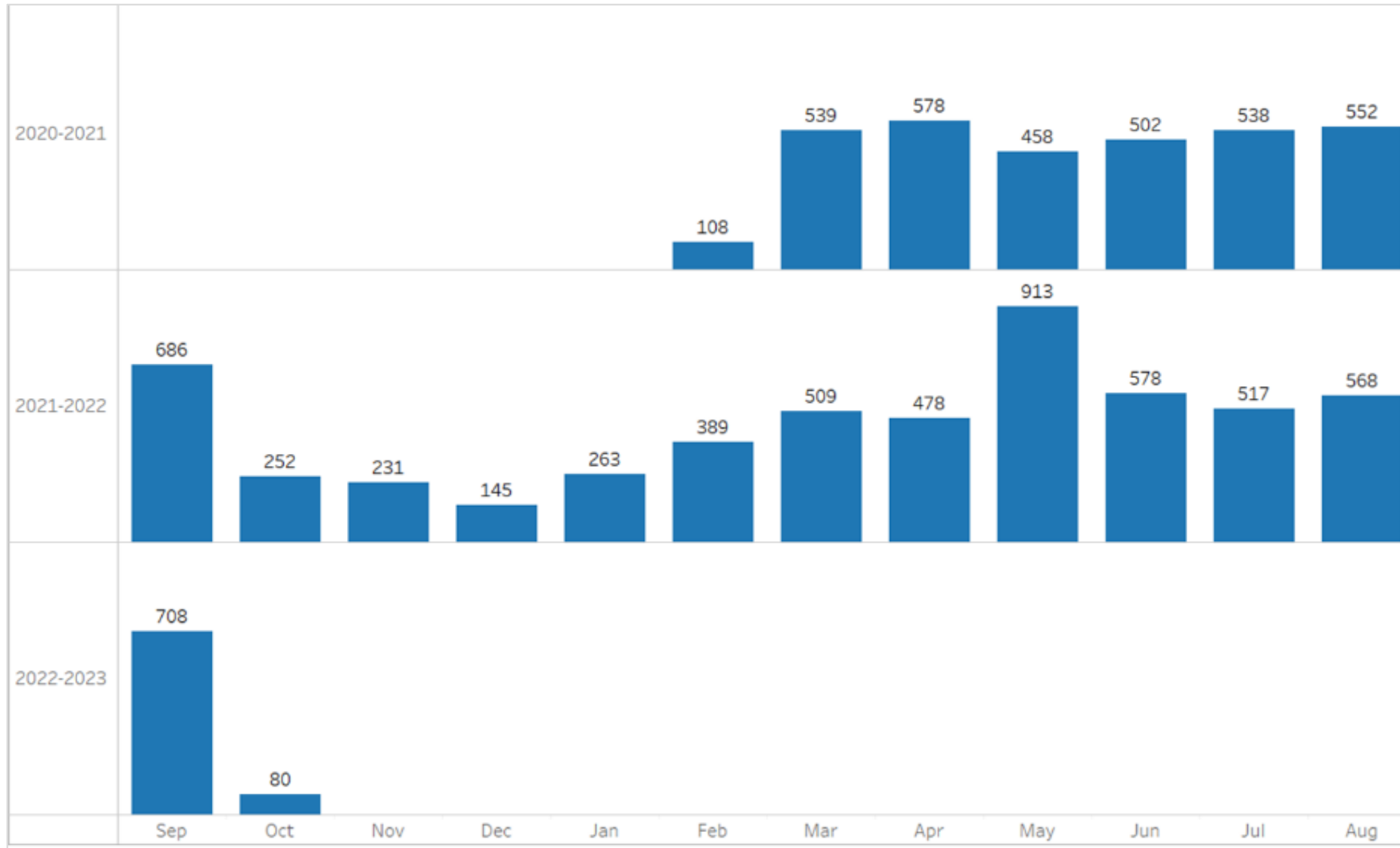
Data extracted from H2STA tableau dashboard on 10 October 2022

4 – SEND tribunal volumes 2019-2022

SEND Tribunal appeals:
Monthly Totals

Appeals by month last 4 years

	Null	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	30	24	70	46	75	46	52	53	67	31			
2021	21	22	49	55	35	34	49	64	61	27	44	33	
2020	24	21	32	17	29	48	44	37	29	24	23	24	
2019	20	17	35	26	25	26	30	18	19	11	6	11	

5 – Forecast EHCP growth

Forecast EHCPs for NCY 0 - 14
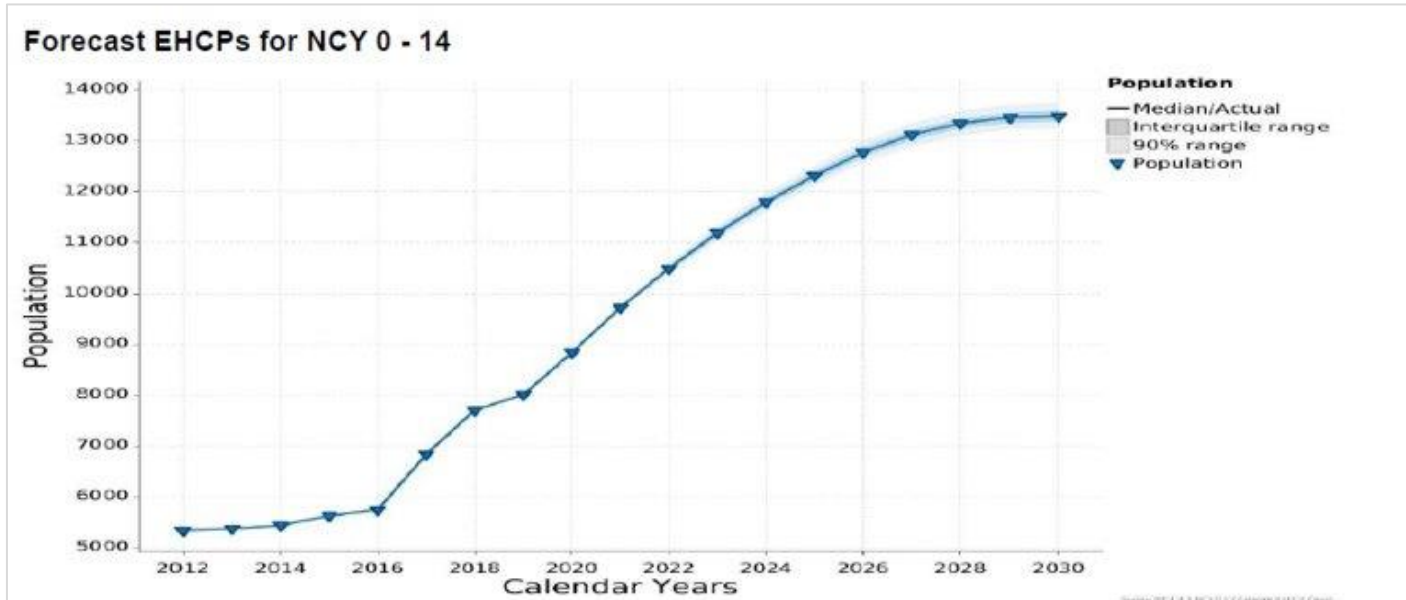
Graph 3: Forecast EHCP numbers for NCY 0-14 (projections developed by Mastodon C)

Utilising the Mastodon C forecasting for Education, Health and Care Plans (EHCP), the current forecast(s) remain broadly on track. For example, as of August 2022, 11,174 pupils in NCY 0-14 had an EHCP. Forecasts as of August 2022 remain broadly in line with numbers for this cohort.

EHCP growth – and subsequent demand for specialist provision, is expected to reach its peak in 2026-27 and 2027-28, before reducing slightly thereafter. By 2030-31, the total number of Surrey EHCP pupils in National Curriculum Years (NCY) 0-14 (age 4-19 years), is projected to be more than 2,500 higher than the 2020-21 total.
It is likely there that expansion of the Specialist Education Estate in the published Phase 4 of the capital development programme is necessary to achieve our long-term ambition to ensure that Surrey resident pupils receive a full time high quality specialist education closer to home, more connected to local communities and local support services.

Sufficiency Statement 22: EHCP growth is current forecast to reach just under 14,000 for NCY 0 -14 by 2030. Additional specialist provision will therefore continue to be required, alongside mainstream capacity and support schemes.

6 – Surrey H2STA financials as of November 2022

Financial Year	Budget	Actual / Forecast (including Covid costs)	Variance	Covid-19 Impact	Year on year	Year on year 2
	£m	£m	£m	£m	Budget movement	Actual movement including Covid-19
19/20	40.10	43.80	3.70	0	-	-
20/21	41.80	37.50	-4.3	3.20	+4.24%	-14%
21/22	40.10	47.50	7.4	2.40	-4.07%	+27%
22/23 (m7 projection)	40.00	53.00	13.0	0	-0.25%	+12%
23/24 (draft)	57.00	57.00	0.0	0	+42.50%	+8%

7 – Journey of one foster carer through the H2STA end-to-end process this year

- Transport has a cut-off date for application for transport / escort. Family are (currently) only able to apply for transport when the correct school is named on EHCP
- SEND admissions team offers proposed school to family
- Family disagrees with proposed school and decides it is necessary to proceed to appeal and pursue a specific school
- Appeal takes place and family is awarded the school they requested. This is named on the child's EHCP
- Family awarded both Transport and Escort 7 weeks before the start of school
- Family trying to contact transport team by phone / email - no avail. Auto reply indicated late applications might not get bus from the start of school term. Later the auto reply indicated this was highly unlikely.
- Child getting ready for new school. New senior school. Anxiety, excitement.
- Family raise SEND Transport Complaint - giving the reasons
- SEND Case officer signposts carer to the transport team
- Family are so distressed that they engage multiple external bodies to promote the child's need/ system failing (Member of Parliament, Councillor, Executive committee for Foster parents, Child's social worker)
- Child is absent from school and school pursue parents as to why
- Carer told his complaint will be handled as Early Resolution. Passed onto Taxi company to start transporting within the week.
- Taxi called to agree the work was now funded. Required a few days to identify how to juggle where to fit this onto an existing bus route.
- Bus identified. Arrange collection
- School pleased to see child on their first day at secondary school (after missing the first 9 days of school).
- Child given additional stress and anxiety because not starting school on the same day with all children. Some children already made friendships, Now more difficult to 'break into' those new friendships... etc. Also lost days of education.
- Carer concludes it was necessary to proceed with complaint to ensure the root cause is addressed: those going to appeal are certain to be treated as late applications and thus their children suffer no transport at the start of term.

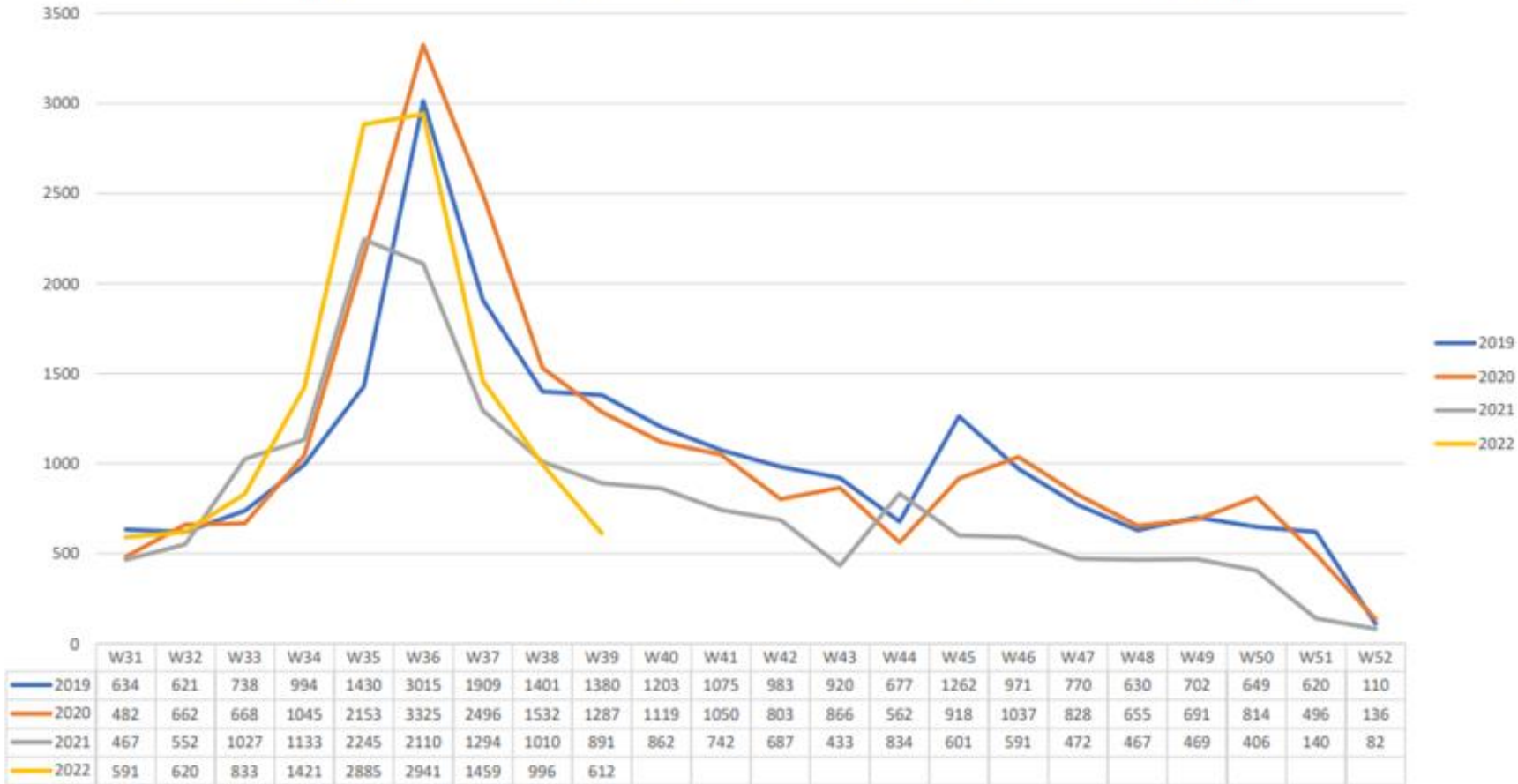# 8 – Communications issued re H2STA, reviewed during this learning review

- 15 February 2022 – Letter issued by SEND team which accompanied the final KST EHCP with transport wording that H2STA team devised
- March 2022 – Letter to Year 11 applicants receiving transport confirming that they will need to re-apply for assistance
- 20 April 2022 – Reminder letter sent to post-16 (16-19 and 19-25 SEND) receiving transport reminding them of the requirement to re-apply
- 28 April 2022 – Reminder letter to Key Stage Transfer cohort advising them to apply for transport
- May 2022 – Message on website regarding driver shortages
- 16 May 2022 - Email text to bulk assessment applicants who were eligible for assistance
- 24 June 2022 – Comms to post-16 cohort regarding the bursary introduction
- 30 June 2022 – Communication about the policy changes to all parents registered on their Mobisoft system
- 15 August 2022 – Document published on website about the key changes to the H2STA policy
- 23 August 2022 – Pre-emptive comms to 'late' applicants confirming ITA will be awarded (SEND under 16) 'late SEND apps – ITA wording'.
- August and September 2022 - Emails confirming eligibility for SEND students via bulk assessment
- 26 October 2022 – Emails notifying parents where their application for travel assistance has been unsuccessful
- August 2022 - Parent guide to the new policy that was completed and sent via Family Voice mid-August
- September 2022 – September update on H2STA service disruptions
- 8 September 2022 - Statement published on social media, on Council external website and on the Local Offer
- 12 September 2022 - External comms issued to Family Voice
- October 2022 – October update on H2STA service disruptions

9 – Draft H2STA systems picture requiring validation

Team	Data capture systems	Data reporting systems
H2STA	GOSS online forms	Tableau
	Excel	SharePoint
	SharePoint	notify.gov
	Mobisoft	
	ADAM	
Corporate Contact Centre	Zendesk & CISCO	Zendesk Developing a Tableau dashboard using data from ZD via SQL database
Be Heard (CFLL Customer Relations team)	Case Tracker	
EHCP development and social work	EYES	Tableau
Admissions	Synergy	
Appeals	Excel/emails	
	EYES	Tableau (awaiting development)
Complaints	social media	
	emails	
	phone	

10 – Education calls into the corporate contact centre: 2019-2022

Education Calls Offered YOY comparison August – December (source data: CISCO Telephony)

	W31	W32	W33	W34	W35	W36	W37	W38	W39	W40	W41	W42	W43	W44	W45	W46	W47	W48	W49	W50	W51	W52
2019	634	621	738	994	1430	3015	1909	1401	1380	1203	1075	983	920	677	1262	971	770	630	702	649	620	110
2020	482	662	668	1045	2153	3325	2496	1532	1287	1119	1050	803	866	562	918	1037	828	655	691	814	496	136
2021	467	552	1027	1133	2245	2110	1294	1010	891	862	742	687	433	834	601	591	472	467	469	406	140	82
2022	591	620	833	1421	2885	2941	1459	996	612													

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