



Home to School Travel Assistance Learning Review Select Committee 15 December 2022



SURREY
COUNTY COUNCIL

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.

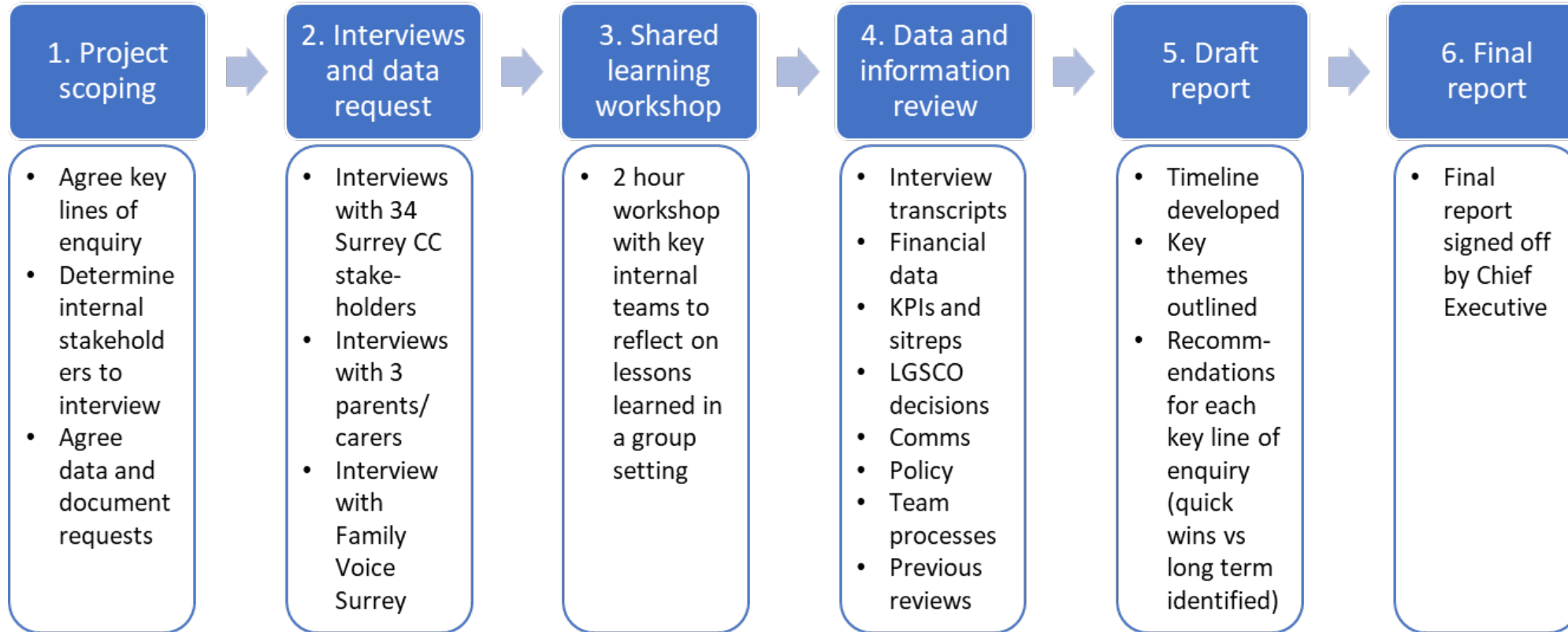
In September 2022, a learning review was commissioned to:

- 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.

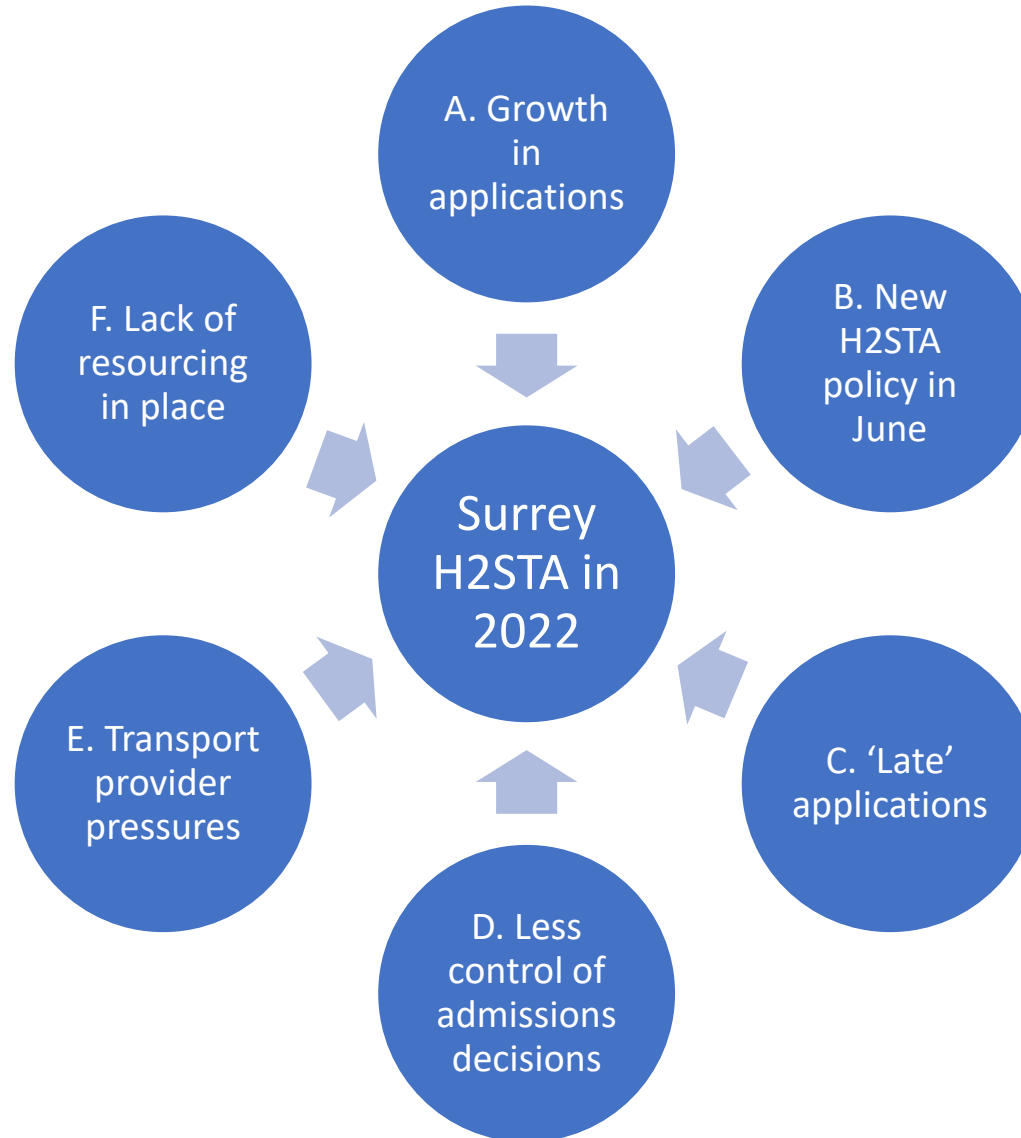


Methodology

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.



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



Key impacts

1. Build up of applications, enquiries, complaints, and appeals

2. Some children missing education

3. Workforce pressures



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

Joining up the end-to-end H2STA process is a key theme of the learning review recommendations

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

Short term priorities recommended

- Appoint a Senior Responsible Officer across the end-to-end process.
- Undertake a wider organisational design review across the multiple teams that contribute to H2STA.
- Review processes for transport reapplications post-16 and for those continuing in the same school.
- Agree the circumstances under which emergency payments of travel allowances can be made and the process.
- Review the process for triaging and prioritising transport applications for vulnerable children and young people.
- Develop a flexible and agile end-to-end resourcing and training model to resource the end to end process.
- Establish an officer-level operational end-to-end H2STA coordination board.
- Review why no bikeability or driving lessons have been agreed in 2022 and put plans in place to increase their uptake.
- Agree a consistent policy on whether mileage reimbursement covers 2 or 4 journeys and implement changes.
- Agree a process and timeframe for conducting bulk assessments of mainstream applications.
- Validate the current picture of systems and data across the end-to-end H2STA process.
- Progress initial trajectory modelling of the financial implications of rising demand for H2STA.
- Review data and evidence to understand if the refreshed H2STA policy is on track to deliver the expected outcomes.
- Assess the cost of appeal decisions in relation to 2022/23 H2STA applications.
- Roles and responsibilities between finance and the service to be set out explicitly.
- Document how to process applications, delivery, appeals, contacts, and complaints, and SLAs.
- Review and strengthen the communications that go out to families with EHCPs.



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.



BACK UP SLIDES

Summary of medium term priorities

Recommendation number and description

- | Recommendation number | Description |
|-----------------------|--|
| 11 | Review the processes for stage 1 and stage 2 appeals to identify opportunities to simplify. |
| 12 | Consider replacing the single application deadline for H2STA applications with multiple application cycles. |
| 13 | Extend the use of pre-approval mechanisms to enable applications to be processed faster. |
| 14 | Develop different pathways for making an application where we already know about the child's specific needs. |
| 15 | Review eligibility decision making processes around children attending pupil referral units. |
| 16 | Explore further actions that can be taken to ensure SEND case workers have capacity and knowledge to liaise with families about travel assistance. |
| 17 | Explore whether the final agreement of the EHCP could be automatically linked to the travel assistance application to streamline the process. |
| 18 | Continue to embed and monitor wellbeing and support recommendations for the H2STA service via the CFLL People and Change working group. |
| 19 | Deliver a staff engagement and training programme to help colleagues operate as one team across the end-to-end process. |
| 20 | Build travel assistance considerations into the Lifelong Learning Strategy to be discussed with Cabinet on 31 January 2023. |

Summary of medium term priorities



Recommendation number and description

23	Continue to roll out shared record management and information governance procedures.
24	Review blockers to digital transformation and set out clear recommendations for leadership about how they can be addressed.
25	Twin Track to report on the full digital transformation required for H2STA including the cost and timeframes.
26	Build in the costs of pupils who are receiving ITA, ITT and other alternative forms of travel assistance into existing Tableau reporting.
27	Put a process in place to provide greater assurance on the reconciliation between the Mobisoft information and SAP postings.
34	Review training of stage 2 appeal panel members to quality assure the approach and materials.
35	Create a standard reporting suite and reporting framework.
36	Undertake further benchmarking to understand how the H2STA service in Surrey compares with peers.
37	Ensure a robust process is in place to record and report absences from education due to lack of transport provision.
38	Introduce a system and process to centrally monitor, record and report on all appeal outcomes and their impact.

Summary of medium term priorities



Recommendation number and description	
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.
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.
41	Continue to deliver actions set out in the April 2022 internal audit of the service.
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.
46	Develop and implement professional and consistent template emails and letters for all communications.
47	Create a single customer front door for H2STA to improve the experience of parents and carers in interacting with the Council about H2STA.
49	Review the Dynamic Purchasing System (DPS) to identify further efficiencies and reduce exposure to market volatility.
50	Take forward the Freedom to Travel transformation programme through Twin Track.

Long term priorities

Recommendation number and description

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.
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.
42	Develop a culture of robust programme management, quality assurance and performance across the end-to-end process.
43	Review the equality impacts of the refreshed H2STA policy and the steps that have been taken in mitigation.
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.