

Monday, 12 June 2023

HOME TO SCHOOL TRAVEL ASSISTANCE UPDATE

Purpose of report:

The purpose of this report is to provide the Committee with an update on the Home to School Travel Assistance (H2STA) Improvement Programme and the current performance of the service provided to children, young people, and families of Surrey. The report sets out improvements and changes to the service and our end-to-end system since December 2022 as well as ongoing initiatives to enhance the customer experience for September 2023. An update of progress made against the specific recommendations from the learning review, Children, Families, Lifelong Learning and Culture Select Committee, and Family Voice Surrey is also included.

Introduction:

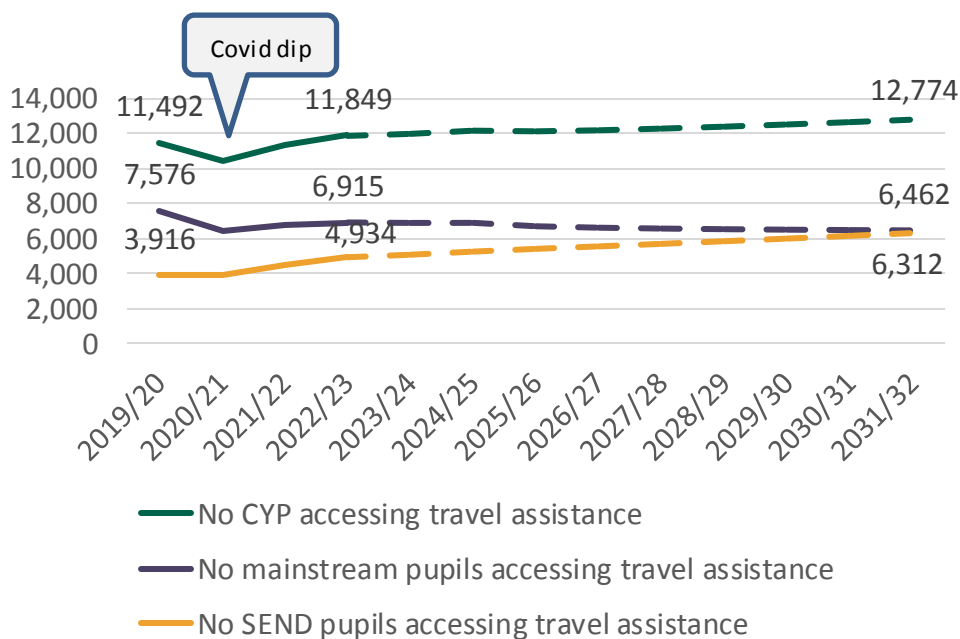
1. Approximately 160,000 pupils attend education settings each day in Surrey. A small proportion (around 7%) qualify for home to school travel assistance. The Home to School Travel Assistance (H2STA) service currently provide travel support to 11,849 children and young people of which 4,934 (42%) have additional needs and disabilities. Provision of travel assistance is statutory in certain circumstances, as set out in the Education Act 1996.
2. On 15 December 2022 the Children, Families, Lifelong Learning and Culture Select Committee considered the findings of the learning review undertaken on the H2STA service. This review, undertaken by the Chief Executive's Chief of Staff and the Chief of Staff to the Executive Director of Children, Families and Lifelong Learning (CFLL), was focussed on the start of the new academic year in September 2022 when experiences of families accessing and using the service fell short of the standards set by the Council. The review also covered the implementation of the refreshed H2STA policy on 14 June 2022. The learning review was completed over an 8-week period between late September and mid-November 2022, with 50 recommendations for consideration.
3. A separate report on the same agenda was presented by Family Voice Surrey detailing families' experiences during the same period following a detailed

survey. This included an additional 12 recommendations (19 actions) on how to improve the customer experience for residents.

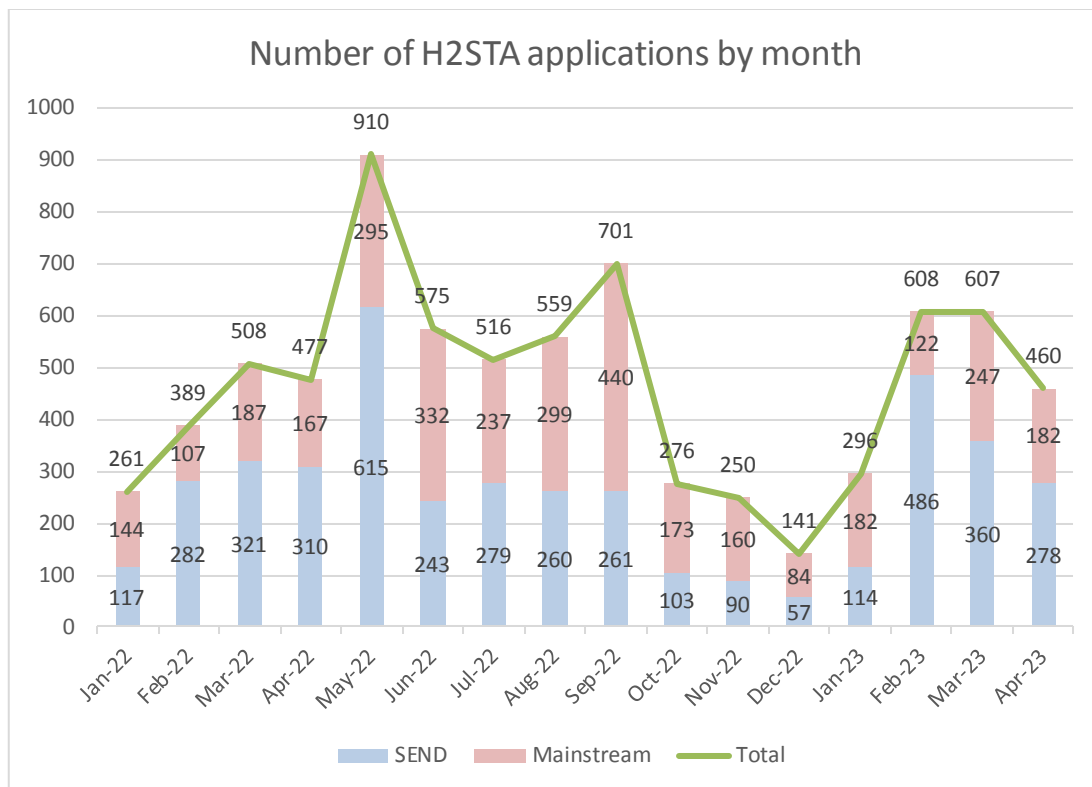
4. The Committee agreed that the service should integrate the 50 recommendations from the learning review, the 12 recommendations (19 actions) from Family Voice Surrey, and the 4 recommendations (14 actions) from CFLLC Select Committee into the newly formed improvement programme as a priority. There was significant overlap between these recommendations, but they have been kept separate for reporting purposes.
5. These recommendations and improvement plans are a major part of the organisation’s response to the unprecedented number of applications for travel assistance, volatility in fuel costs and inflation, as well as the scarcity of suppliers and drivers. These pressures are not unique to Surrey and are a national issue putting significant strain on the H2STA service, the end-to-end system, and budgets within the Medium-Term Financial Strategy.

Current Performance and Demand

6. The number of Children and Young People accessing the service has increased by 3% over the last 4 years to a current total of 11,849. This modest increase masks a significant change of profile within our Mainstream and SEND cohorts, who have seen a 9% reduction and a 21% increase respectively over the same period. This trend is expected to continue in the years ahead when aligning our trends with those within school place planning and Education, Health and Care Plan (EHCP) forecast modelling.



7. This shift has been a major contributing factor to our financial pressures and the strains on resource levels. The average cost per annum of a travel arrangement for a child or young person with additional needs and disabilities (£9,215) is currently eight times that of mainstream (£1,180), with travel needs and vehicle specifications being more expensive and in short supply. Travel times are longer with journeys averaging 11.5 miles compared to 4.3 miles in mainstream education. These differences increase the time and resource needed by staff from the point of application through to the delivery of transport. The increase of 856 pupils with learning needs and disabilities since 2019/20 has increased annual expenditure by close to £8m.
8. Applications for Travel Assistance are made throughout the year. Close to 35% of all applications received are not bound by the annual process for the start of the new academic year each September. This percentage has increased steadily over recent years in line with the increased profile of pupils with additional needs and disabilities and therefore those with an EHCP. This trend presents challenges with route optimisation.
9. A major contributor to the performance issues last year was the peak in applications (910) that came through in May 2022. This peak, along with the high volumes of applications in surrounding months and the delays in our bulk assessment process for Mainstream, led to delays in managing eligibility, delivery, complaints and appeals throughout the summer and into the Autumn term.
10. In preparation for this academic year, we have increased capacity in all areas, but also undertaken proactive work in a two-pronged approach to smooth out the peak in applications. This has included proactive communications and case work, whilst reminding families to apply earlier in the school application process. There are early signs that this strategy is working with 1,971 applications from January to April 2023 compared to 1,635 in the previous year (21% increase). We have also used insights and data to assist in writing to 850 families (7.2% of all pupils), including those in our Post-16 cohort, to remove the need to reapply. This is the first time an exercise like this has been completed.
11. The figures presented overleaf do not include bulk assessment (a process used to review eligibility of mainstream pupils as part of the annual admissions process), which represents a separate process that led to 630 eligible applications in 2022. This year the exercise covered the assessment and eligibility of c.13,500 children and young people as part of our work with Admissions, leading to 633 eligible applications. This work was completed on 21 April 2023, the earliest this exercise has been completed and significantly earlier than the previous year where delays in this process caused system issues throughout the summer period.



12. Appendix A shows the main H2STA Key Performance Indicators (KPIs) for April 2023 with comparable year on year data. These KPIs were created as part of the response to the learning review to ensure service performance is regularly tracked and reported using reliable data. In addition to the KPIs shown in Appendix A, there are further indicators and reports within the service that track progress across the system at a more granular level to support performance and decision making.
13. Positively, the number of applications we receive who are assessed as eligible has increased in the last quarter, indicating that our improvement work on communications, applications and eligibility forms are working. In April 2023 72% of all applications were eligible compared to 75% in April 2022 and 62% across all of 2022. Despite the significantly higher number of applications in February and March 2023 the number of applications processed within 20 days is currently 96%, which is above our 95% target and in line with the previous year.
14. At the time of writing, we have no children and young people waiting more than ten days for transport arrangements. An additional development in this area is the ability to report how many vulnerable young people are awaiting transport arrangements and we can now routinely prioritise those arrangements when needed within our systems.
15. In April there were no stage 1 complaints that were overdue compared to two (40%) in April 2022. There are currently no stage 2 complaints that are overdue

compared to one (100%) in April 2022. In exceptional circumstances there may be complaints received outside of our normal complaints processes that are therefore not captured in reporting. We are working to channel all complaints through one form to ensure reporting is as accurate as possible. Active complaints in April (2) are down 85% compared to last year (14) as we continue our focus on early resolution and using a learning framework in the team.

16. We currently have no stage 1 or stage 2 appeals that are overdue. We do not have comparable data for last year, however, we have seen significant improvement in this area month by month since the service was restructured in early December.
17. We currently have double the number of Children and Young People travelling independently (944 compared to 428 last year), as well as a reduction of 9% in the more expensive solo taxi arrangements compared to April last year (17% decrease when using year on year averages). The majority of these arrangements have moved onto shared vehicles or an Independent Travel Arrangement. This has reduced spend by close to £3.4m per annum. A large number of our solo arrangements do not have a solo requirement following eligibility assessment (502 of the total 599). These individual arrangements are in place due to attending schools where only one pupil requires transport, or where there is no possibility to share existing arrangements due to the statutory guidance parameters of maximum 75-minute journey times for secondary pupils and 45-minutes for primary pupils.
18. The overall average number of pupils per taxi is currently 3, up from 2.8 last year indicating better vehicle utilisation in shared arrangements.
19. A significant part of our improvement plan has been focussed on two key elements for successful delivery. Firstly, the customer journey taken by families and our teams from a school or placement decision for a Child or Young Person through to their arrival on-site for education. Secondly, resource planning of the end-to-end system. We redesigned our H2STA service in December 2022 and also have temporary additional resources (internal and external) who are fully trained and will be deployed from April to September to support with the anticipated increased volume of activity and demands within the system.

Financial Position

20. The H2STA budget overspent by £12m in 2022/23, with spend increasing by 12% since the previous financial year and 18% since 2019/20, where the service reported an overspend of £4m at outturn.
21. The financial challenges are not unique to Surrey. Through our County Council Networks (CCN) and wider landscape conversations it is clear this is a national

issue with many organisations facing difficulty with high inflation and the supplier market following the pandemic. Recent benchmarking, which included organisations within the CCN, are reporting an average increase in spend of 36% since 2019/20.

	2019/20 £m	2020/21 Actual (incl Covid) £m	2021/22 Actual (incl Covid) £m	2022/23 Actual £m	Variance since 2019/20 %
Budget	39.8	43	41	39.7	0%
Actual Mainstream	8.4	6	7.3	7.8	-7%
Actual SEND	35.4	29.9	38.7	43.9	+24%
Variance	4	(7.1)	5	12	

22. There were three key pressures on the 2022/23 budget:

- Full-year pressures from 2021/22, where significant demand in pupils with Additional Needs and Disabilities were returning into the system during the financial year following the suppressed volumes of routes from restrictions during the pandemic. In addition, the previously available supplementary Covid-19 grant funding fell away.
- Increased demand of children and young people with Additional Needs and Disabilities throughout 2022/23. These pupils cost on average eight times the amount as mainstream due to reduced options for independent travel arrangements, specific vehicle specs (for example wheelchair accessibility), and often longer journey times (average of 11.5 miles compared to 4.3 miles in mainstream).
- Inflation has been significantly higher than the inflation levels built into the base budget (5%). As well as general inflation, this has been compounded by a shrinking operator and driver pool, vehicle shortages and increasing vehicle costs and compliance. This has all led to higher costs across the supply chain.

23. These issues have put average costs under pressure compared to pre-pandemic levels in Mainstream and SEND, however, they have been partly mitigated by our successful drive to reduce overall solo taxi arrangements and promote independent travel. This has supported containing overall average costs per pupil in mainstream and SEND to well below inflation levels over the last 4 years:

Mainstream cohort	Average cost 2019/20 £	Average cost 2022/23 £	% change since 2019/20
Pupil average	1,100	1,180	+7.2%
Solo taxi	8,000	12,000	+50%
Shared taxi	4,200	4,000	-5%
Coach	1,000	1,400	+40%
Travel Allowance	600	900	+50%*
Personal Budget	n/a	2,500	n/a
Season tickets	600	400	-33%**

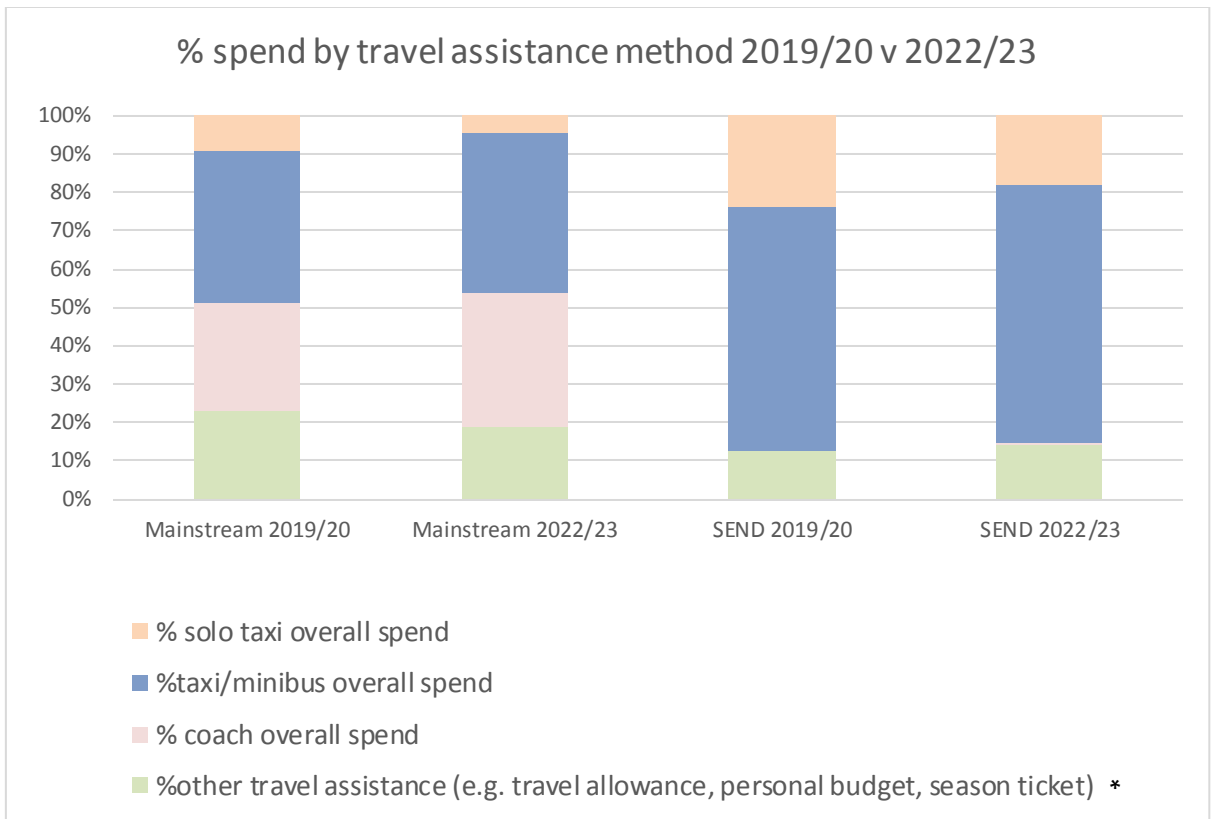
SEND cohort	Average cost 2019/20 £	Average cost 2022/23 £	% change since 2019/20
Pupil average	8,820	9,215	+4.5%
Solo taxi	12,100	17,000	+40%
Shared taxi	7,600	8,100	+7%
Coach**	1,300	1,250	-4%
Travel Allowance	2,700	3,100	+15%*
Personal Budget	n/a	3,500	n/a
Season tickets**	200	600	200%**

*Travel allowance increase partly due to move to paying 4 journeys instead of 2

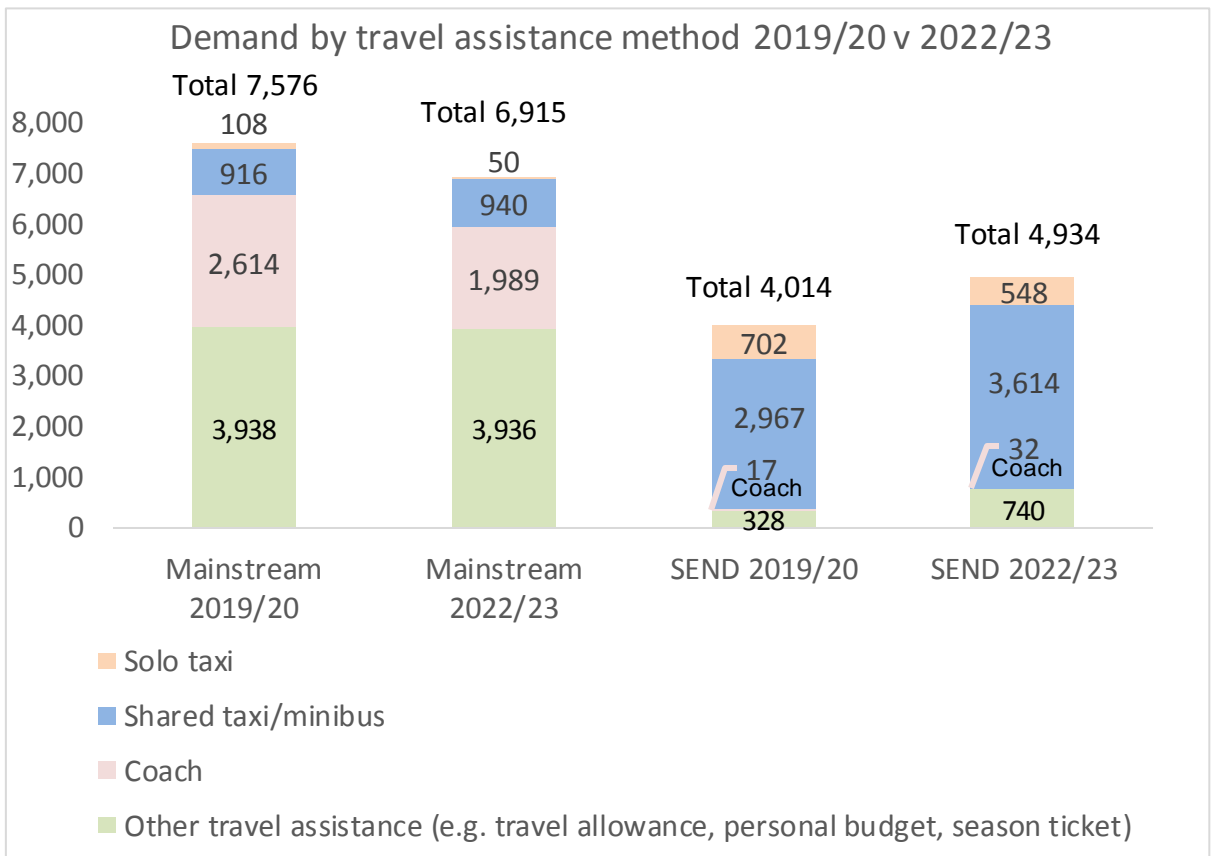
** Coach and season ticket changes in SEND are immaterial due to low uptake.

Mainstream decrease in season tickets due to 16-18 national rail card scheme.

24. The service delivered £3.4m of cost containment this academic year through the reductions in solo taxi usage, extension of bursary offers in Post-16 and increases in independent travel arrangements. Due to the timing of the academic year £2m of this was realised in 22/23 (Sept – Mar) with another £1.4m (Apr – Aug) planned for 23/24 to contribute towards next year's efficiency targets. Without these initiatives, and other activity, the overspend position for 22/23 could have been as high as £15m in this financial year. The spend profile table overleaf shows changes in spend areas since 2019/20:



* Mainstream 'other travel allowance' spend has reduced due to national 50% rail subsidy for 16-18 year olds introduced in 20/21.



25. The H2STA budget for 2023/24 has been increased to accommodate the recurring pressures from 2022/23, the anticipated future demand in SEND pupils throughout the new financial year, as well as the expected level of inflation across various transport arrangements. This includes the judgement by the LGSC Ombudsman that all councils should pay four journeys instead of two across our Independent Travel Allowances. There was also additional resource for staffing as part of the service redesign in December 2022.

2023/24 Budget Build	2022/23 Base Budget £m	Prior year pressure £m	23/24 demand pressure £m	23/24 inflation pressure £m	Efficiencies for 23/24 £m	Net Budget 2023/24 £m
Demand Budget	39.7	+12	+4	+2.5	-3	55
Staff Budget	1.1	-	+0.5	+0.1	-	1.7

Improvement Plan Update

26. The learning review concluded that there were six factors coalescing around the same time that negatively impacted the start of the academic year 2022:
- Growth in applications – Applications in 2022 were the highest on record. Numbers for 2023 are currently 21% higher than at the same point last year (January to April).
 - The introduction of the new H2STA policy in June - The refreshed H2STA policy (including the Post-16 statement) was published on 14 June 2022. The implementation was not executed effectively and coincided with peak volumes in the system that we were not prepared for.
 - Applications being received after deadlines - a large volume of applications for travel assistance were received after the 6 May deadline. This was the deadline for applications which would ordinarily be guaranteed to have transport arrangements in place before the new school year in September 2022.
 - Less control of admissions decisions – The mainstream eligibility ‘bulk assessment’ of school applications to pre-assess families’ eligibility for

school travel assistance, was completed 4-5 weeks later than planned in 2022.

- Transport provider pressures - The transport provider market is being affected by a national driver and vehicle shortage and volatile fuel costs, making it more challenging for the H2STA team to source suitable transport arrangements.
 - Lack of resources – the teams involved were not structured or resourced adequately to deal with the volumes in the system.
27. The learning review presented 50 recommendations to address these issues and they were subsequently integrated into our service improvement plan following agreement from CFLLC Select Committee. In response to these findings, we overhauled our service improvement plans and strengthened governance arrangements with the introduction of the monthly H2STA Oversight Board from 15th November 2022. The Board has both Member and Senior Officer attendance from across the end-to-end system.
28. The improvement plan has large amounts of activity outside of the learning review, and we have therefore integrated and reconciled all recommendations and subsequent actions that were agreed on 15 December 2022 from the learning review, Family Voice Surrey and CFLLC Select Committee. We have also included the Internal Audit findings and recommendations from May 2022 for completeness.
29. There was a high amount of overlap between the recommendations, but we have kept them separate for reporting purposes. Progress against these specific recommendations is shown below.

Recommendation Progress	Learning Review	Internal Audit	Family Voice	CFLLC SC Recommendations
Total Recommendations/actions	50	21	19	14
Number completed	34 (68%)	15 (71%)	11 (58%)	11 (79%)
Number underway	15	6	8	1
Number yet to begin	1	-	-	2

30. The majority of the recommendations marked as ‘underway’ are either scheduled to be completed by the end of June 2023 or longer-term projects such as ICT system developments and integrations. We are prioritising progress in areas that will have the biggest impact for this academic year. The three recommendations that are yet to begin and the one CFLLC SC recommendation that is underway are:

Recommendations not started	Reason
<p>CFLLC SC Recommendation 1 part D Systems are coordinated so that an application for travel assistance is automatically made at the point at which a school of qualifying distance is named on the EHCP. An application is not classed as late in the circumstance that a school is named in the plan after deadline</p>	<p>Single View of a Child (SVOAC) Phase 3 is focussing on system integration and automation. This is being supported by Digital Discovery. SVOAC is due to be completed June 2024. Applications will no longer be classified as “late”.</p>
<p>CFLLC SC Recommendation 2 part E CFL carries out an annual survey of H2STA satisfaction in conjunction with Family Voice Surrey.</p>	<p>The service fully support this recommendation and we will work with Family Voice Surrey closer to the start of the new academic year.</p>
<p>Learning Review Recommendation 48 Align customer relationship management systems (CRMs) and telephony systems across the corporate contact centre, CFL 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.</p>	<p>Initial focus has been working with and improving the systems we have to support a better experience for families. Longer term solutions for a CRM will be explored for September 2024. This is being supported by Digital Discovery.</p>

CFLLC SC Recommendation underway	Reason
<p>CFLLC SC Recommendation 1 part F Where young people have the potential to travel independently, the independent travel training offer is promoted and additional public transport routes commissioned wherever possible.</p>	<p>We have improved our promotion of independent travel across our website and communications. We are in the process of redesigning our application forms through digital design to automate promotion and offer conversations with families at source. We are also working on strengthening our training and approaches with our ITT provider.</p>

31. The programme team has moved to a thematic way of grouping activity within our improvement plan with workstreams focussed on improvements for Children and Young People, Families, Suppliers, our teams, and our back-office systems and processes. This has allowed us to easily integrate the previous

recommendations and constantly reprioritise activity and resources with workstream leads and key stakeholders.

32. As part of developing our improvement plan and wider thinking we have held dedicated sessions with five other Councils and joined network groups such as ATCO and the National Independent Travel group. In addition, we have worked with an external consultancy as part of our wider cross-cutting ambitions within the Freedom to Travel programme.
33. This is a significant change programme that we anticipate will run until September 2025. We have completed 71 of the recommended actions as well as a large number of activities from our wider programme or work outside of the learning review. The majority of our initiatives will continue to evolve as part of our continual improvement approach and learning framework.
34. The improvements implemented since September 2022 include:

Our teams

- 34.1 The learning review assessed that there was a lack of adequate resourcing and ineffective working across the customer journey. In response a full restructure of the H2STA service was completed in December 2022. This included merging teams and processes to improve case management from application through to delivery, as well as queries through to complaints and appeals.
- 34.2 Targeted training and upskilling across the team and end-to-end system was a significant part of embedding the new structure and will continue to be a major part of our improvement journey.
- 34.3 The start of academic year 2022 highlighted a lack of planning and contingency plans for system peaks. We have developed a project management approach to the start of the academic year with critical paths created and resource planning across the end-to-end system. A learning framework is in place to ensure we continually iterate and improve our approach year on year. We have fully trained bank staff to support with peaks in activity throughout the year and increased resource in customer services and those trained to deal with Education related queries.
- 34.4 Inadequate communication was a major theme in findings from the learning review and feedback from Family Voice Surrey. We have made step changes to our internal communication and working across the system. This includes weekly working groups, end-to-end resource planning, and joint working with Admissions colleagues on bulk assessments to reduce bottlenecks in eligibility and delivery.

Improvements for Children, Young People and Families

- 34.5 Externally we have developed a thorough communications plan and improved external communications and working with Family Voice Surrey. This includes the co-production of a family guide with Family Voice Surrey as well as regular sessions to discuss live issues that affect families.
- 34.6 Through targeted work and better use of insights and data we removed the need for 850 families (pre and post 16) to reapply for transport in 2023.
- 34.7 A request from Family Voice and the CFLLC Select Committee was to review our Independent Travel Allowance and paying families for four journeys (round trips). In response we updated our policy in February 2023 and now pay families who receive Independent Travel Allowances (ITAs) for four journeys instead of two. This work included backdating payments to reimburse families from September 2022. These additional costs made up part of our 2023/24 budget build.
- 34.8 We now offer all eligible families a temporary Independent Travel Allowance (ITA) paid in advance, to cover the costs of transporting their child to school while contracted transport is being put in place.
- 34.9 Customer contacts, complaints and appeals processes have all been strengthened following the findings from the learning review. A stakeholder liaison role was part of the new H2STA structure, whilst the complaints and appeals service now focus on early resolution as default. Appeals training has been refreshed and panels now include the Safer Routes team where necessary.
- 34.10 Last year 25% of all applications related to Post-16 and 71% of those applications led to an appeal. This was mostly due to the 2022 policy change but in response we have stood up a dedicated team for Post-16 from April to July to undertake targeted work and early conversations with families on their travel arrangement options, including advice on bursaries.

Back-office systems and processes

- 34.11 To address several recommendations from the learning review and the Internal Audit from May 2022, we are in the process of completing a full digital discovery review of the end-to-end system focussing on pain points and opportunities to streamline processes. This 15 week review concludes in May and will generate a pipeline of further improvements across our internal and external systems and processes.

34.12 At the same time, we have prioritised digital and website quick wins including an eligibility checker, new online enquiry portal for parents, a new appeal form for improved case tracking, and application form enhancements to reduce eligibility waiting times. This work will also assist in reducing the number of ineligible applications. A banner has been created on our website to provide regular service status updates to visitors of our website. We are working with our Web team on future improvements and a full redesign across all H2STA content and linkages to other services.

34.13 We have strengthened our performance and financial monitoring with real-time performance management information and financial monitoring. At the same time, we have improved data integrity and accuracy as part of our KPI development and ten-year trajectory modelling for demand and budgets.

Suppliers

34.14 We have engaged with fourteen suppliers, as well as building on previous work with our Community Transport providers, to help build the foundations of our future supplier strategy. This strategy will form part of our cross-cutting work across the organisation and also support the Sustainable Modes of Travel to School Strategy (SMOTSS).

34.15 We have continued to support and develop long term solutions and a pipeline of activity for travel assistance through the Freedom to Travel programme, which has included Commissioning model reviews and exploration of an in-house fleet in SCC. The Freedom to Travel programme is focussed on developing cross-cutting initiatives across CFLL, ETI, ASC, Health and Partners.

34.16 Successful promotion of Independent Travel Allowances and the reductions in solo taxi arrangements have contributed to cost containment and will continue to be a priority area for future efficiencies.

35. As a result of this rapid improvement activity, we have seen consistent improvements across our KPIs, as well as an improvement in our financial position in the second half of the financial year (September to March), with our in-year overspend reducing from £15m to the current forecast of £12m.

Longer term improvements

36. Our next phase of improvements, many of which have already begun, will shift our focus to more longer-term solutions. These include:

- A full redesign of our website and webpages to enhance the customer experience and simplify our content. This will be considered across the end-to-end system as well as the Local Offer website.
- Integrating systems wherever possible and appropriate through Phase 3 of Single View of a Child. This will include integrating our data to EYES (Liquid Logic) and give us the ability to quickly access data and intelligence across the end-to-end system. Increased speed and accuracy of data and reporting will be a key benefit of this work.
- Developing a full supplier engagement and strategy. We are committed to improving relations with our suppliers and increasing our supplier pool. We have completed interviews with 14 suppliers, including previous and future engagements with Community Transport providers, to understand ways we can support growth and sustainability across the travel sector in the County. This will support the development of a wider strategy across all travel in Surrey as part of the Freedom to Travel programme.
- A full review and market testing for our Dynamic Purchasing and Route Planning Systems is planned for the second half of 2023. This work will support in improving the travel experience for children, young people and families, as well as assisting with cost containment in future years through robust procurement and tendering of routes.
- The full findings of our digital discovery are due in May 2023. Reviewing findings and implementing solutions will be a key priority for the programme team. It should be noted that this is already happening as we have taken a “Sprint” approach to this work to ensure we are working on quick fixes and priority areas as we go through the process.
- End-to-end system improvements will continue to be our focus to ensure improvements are made in both our ways of working and culture.
- Review and implement a long-term Customer Relationship Management (CRM) solution to improve the customer experience, case tracking and audit trail.

Risks for the start of the financial year
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37. The H2STA Improvement Plan has been operational for six months and is expected to run until September 2025. Whilst significant progress has been made, our efforts have concentrated on tactical wins and temporary solutions whilst developing longer term solutions in parallel. As we are still in the early

stages of our improvement journey there remains a number of risks to both the start of the academic and financial year.

38. Last year only 31.4% of applications were submitted by the 6 May deadline for 2022, 45.2% were received between 7 May and 31 August and 23.4% were received after the start of the academic year. Although targeted work and improvements to bring these applications forward are working, and will continue to be a focus, there will still be a significant number that will be received in June to September along with the applications that are not related to the start of the academic year.
39. We have developed contingency arrangements to expedite eligibility and delivery, as well as customer support during these time periods. However, it is still a possibility that a proportion of these applications will face delays to transport arrangements, which have the potential to develop into complaints and appeals close to or during the start of the new academic year. These applications will no longer be classified as “late”. We are focussed on proactive communications, targeted work with families and early resolution to deescalate through the system.
40. The areas expected to impact the start of the financial year are:

Risk	Mitigation
<p>At the time of writing the total number of EHCPs awaiting assessment is c.2,300. The number of Key Stage Transfers in 2023 with EHCPs or awaiting assessment within the system was the highest on record. These volumes present significant system challenges as some settings remain named by “type” rather than the place of education, meaning that transport eligibility is not currently possible.</p> <p>Note: on average 34% of EHCPs convert into requiring transport assistance.</p>	<p>Fortnightly Key Stage Transfer and system planning meetings with system service leads.</p> <p>We are working closely with colleagues across SEND to ensure we are undertaking proactive work wherever possible, this includes exploring early travel assistance work we can undertake to avoid unnecessary, lengthy delays once a decision is made.</p>
<p>There are currently 360 live tribunals as at the end of March 2023. A proportion of these cases will require transport assistance.</p>	
<p>A large number of applications for transport throughout the Summer and September will still happen for a variety</p>	<p>Increased resources in eligibility and delivery to increase run rates.</p>

<p>of reasons (placement appeals, assessment timeframes, application delays etc). These applications will place significant pressure on the team, the ability to optimise routes and therefore our budget envelope. This reduces the time and ability for transport to be in place at the start of the academic year. All efforts will be made to ensure arrangements are in place within our KPI targets.</p>	<p>Increases resource in customer services and Education trained staff.</p> <p>Continued system comms and web development to increase early applications whilst removing the need to reapply where possible. Scaling up resource to fully re-optimize twice a year (July and Jan)</p> <p>Offer upfront payments for temporary ITAs.</p>
<p>Supplier and driver shortages are a national issue, with numbers lower than pre-pandemic levels. There is also scarcity of new vehicles (wait times of over 16 months reported). These conditions are creating a lack of competition, higher costs, and difficulty with longer term planning.</p>	<p>Development of a long-term supplier strategy.</p> <p>Continued promotion of Independent Travel and benefits.</p> <p>Actively working with Community providers to increase supply.</p>
<p>We are seeing an increase in SEND pupils requiring travel assistance (see paragraph 6), as well as a larger number of applications (35%) that are not bound by the start of an academic year (see paragraph 8). This presents fewer opportunities to optimise routes for the start of the academic year, and more volatility in route planning. This can increase solo dependency in-year.</p>	<p>Review of our route planning system & Dynamic Purchasing System.</p> <p>Working with Procurement on soft market testing.</p> <p>Continuing landscape review and benchmarking with other Councils.</p> <p>Scaling up resource to fully re-optimize twice a year (July and Jan)</p>
<p>Our trajectory modelling on our financial position is based on the current known and predicted volumes who will come into the system and convert to needing and being eligible for travel assistance. A +/- 1% variance in the assumed number of Education, Health and Care Plans is equal to annual spend of £0.3m in H2STA. A similar figure is true for inflation.</p>	<p>Clear efficiency programme with clear benefits and targets.</p> <p>Comprehensive monitoring and activity data on a weekly basis.</p> <p>Linked modelling to Safety Vale and Place Planning strategies.</p>

Recommendations:

41. It is recommended that the Select Committee:

- a) Reviews and notes the Council's progress towards the learning review recommendations and the H2STA improvement plan, as well as the associated risks to the start of the new academic year.
- b) Agrees to receive a further update on the performance and progress of H2STA after the start of the September 2023 new academic year. This will include the results of the joint survey with Family Voice.

Next steps:

Report back to Committee on performance and delivery following the start of the September 2023 new academic year.

Report contact

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Sources/background papers

15th December 2022 – Children, Families, Lifelong Learning and Culture Select Committee - [Agenda for Children, Families, Lifelong Learning and Culture Select Committee on Thursday, 15 December 2022, 10.00 am - Surrey County Council \(surreycc.gov.uk\)](#)

26th April 2022 – Cabinet - Home to School Travel Assistance Policy Refresh [Cabinet Report- HOME TO SCHOOL COLLEGE TRAVEL ASSISTANCE POLICY REFRESH.pdf \(surreycc.gov.uk\)](#)

31st January 2020 - Cabinet Member for All-Age Learning [Agenda for Cabinet Member for Education & Learning Decisions on Friday, 31 January 2020, 3.30 pm - Surrey County Council \(surreycc.gov.uk\)](#)

Appendix A – Key Performance Indicators for April 2023

Measure	Apr 22	Feb 23	Mar 23	Apr 23	RAG	KPI / notes
Number of eligible applications Target: ≥75% of total applications received	182 (75%)	285 (69%)	366 (68%)	341 (72%)		Below the 75% target. The percentage will fluctuate in year but has remained close to our target for three months despite the increased volumes of applications.
Number of applications processed in time Target: ≥95% within 20 working days	252 (97%)	358 (93%)	501 (98%)	398 (96%)		There's been a significant improvement in the timeliness of applications since Sept 2022. This has been above target for two consecutive months despite the high volume of applications to process.
Applications awaiting transport Target: No more than 50 at any one time	N/A	29	13	7		As at 05/05, there are 7 CYP waiting for transport to be arranged. This figure excludes transport arrangements due for September 23, for which transport will be organised within the summer school review.
Applications awaiting transport for more than 10 days Target: ≤10 over 10 days	N/A	0	0	0		No applications have been waiting for more than 10 days.
Number of vulnerable children awaiting transport > 10 days Target: 0 over 10 days	N/A	0	0	0		There are currently no vulnerable children awaiting transport for more than 10 days.
Complaints active in the month	14	20	13	2		There's been an overall reduction in complaints compared to same time last year with similar trends in previous months.
Stage 1 complaints overdue (>10 working days) Target: 0	3 (60%)	0	1 (17%)	0		There were no Stage 1 complaints overdue during April.
Stage 2 complaints overdue (>10 working days) Target: 0	1 (100%)	0	0	0		There were no Stage 2 complaints overdue during April.
Stage 1 appeals completed in the month	N/A	51	19	51	N/A	The team have completed 51 stage 1 appeals in Apr 23 with 28 ongoing.
Stage 1 appeals overdue (more than 40 working days) Target: 0	N/A	2 (9%)	1 (2%)	0		There are currently 28 ongoing stage 1 appeals with none that are overdue this month.
Stage 2 appeals completed in the month	N/A	4	7	4		The team have completed 4 stage 2 appeals in April. 3 are currently ongoing.
Stage 2 appeals due overdue (> 40 working days) Target: 0	N/A	0	0	0		There are currently 3 ongoing stage 2 appeals with none that are overdue this month
Numbers in solo taxis	658	531	578	599		The number of solo transport taxis has decreased since last year (-9% compared to last year). Solo arrangements as a proportion of all taxi use is 11% (13% last year). Solo routes traditionally increase through the year before routes are re-optimised in the summer. 12 months average is 17% below the previous 12-month average.

Average number of pupils per taxi route	2.8	3	3	3		On average, there are three pupils per taxi route.
Reduction in real terms (incl inflation) average cost Mainstream Target: ≤ adjusted inflation 10.8%	1.08	1.22	1.18	1.18	9%	Target 1.19 based on 10.8% inflation for 22/23. 9% increase in year. 7% overalls since 19/20
Reduction in real terms (incl inflation) average cost SEND Target: ≤ adjusted inflation 10.8%	8.43	9.14	9.22	9.22	9%	Target 9.34 based on 10.8% inflation for 22/23. 9% increase in year. 4% overalls since 19/20
Independent Travel Arrangements Target: increases in ITAs	428	906	944	944		Close to double the number of ITAs compared to the same point last year.