

**SURREY COUNTY COUNCIL****CABINET****DATE: 25 JULY 2023****REPORT OF CABINET MEMBER: TIM OLIVER, LEADER OF THE COUNCIL****LEAD OFFICER: LIZ BRUCE, JOINT EXECUTIVE DIRECTOR ADULT SOCIAL CARE AND INTEGRATED COMMISSIONING****SUBJECT: FREEDOM TO TRAVEL STRATEGY****ORGANISATION STRATEGY PRIORITY AREAS: TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES/GROWING A SUSTAINABLE ECONOMY/SERVICE EFFECTIVENESS****Purpose of the Report:**

Freedom to Travel is a new pipeline transformation programme to design and deliver a new model of travel assistance services for Surrey. We support around 12,500 people to get to school or college, employment or social care activities to enable better health, education and employment outcomes.

These services are under significant financial pressure due to a combination of economic factors, such as the highest inflation experienced by the UK in decades, and rising demand for services. This is unsustainable for the council. How people experience travel and transport is also changing, thanks to technological developments designed to make travelling easier and more predictable. Surrey also has an imperative to reduce carbon emissions as quickly as possible to meet its net zero targets – reducing transport emissions is a key to the county fulfilling its obligations.

Freedom to Travel aims to respond to these challenges and opportunities with a positive vision for the future of travel assistance services. It aims to simultaneously deliver on objectives to ensure that no-one that requires support to travel is left behind, while also contributing to financial efficiencies needed to make sure these services are sustainable.

Cabinet is being asked to endorse a long-term strategy that accompanies this paper, which sets out a positive vision for travel assistance and a clear delivery plan. As the delivery plan progresses, Cabinet will be asked to make further decisions on some specific projects at subsequent meetings.

**Recommendations:**

It is recommended that Cabinet:

1. Endorses the Freedom to Travel Strategy and approach to delivery.

**Reason for Recommendations:**

“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.”

In order to achieve this vision, a number of significant changes will need to be made in behaviours and expectations and a wider range of transport options be made available to our residents.

A review and change of approach to procurement, commissioning transport and travel, as well as collaborative partner working will offer better value for money, competition and choices within Surrey.

Commissioned transport comprises most of the costs for travel assistance services for SCC. These costs have continued to increase and will continue to do so in line with demand if no action is taken. These increasing demands are not financially sustainable long-term.

The strategic challenges and opportunities facing travel assistance services means there is a strong case for rethinking and redesigning the way we plan, commission and deliver travel assistance. The current model is unsustainable financially and environmentally.

The Freedom to Travel Strategy has been developed to address these challenges and enable the vision.

## **Executive Summary:**

### **Background**

1. Surrey County Council is responsible for commissioning passenger transport services that support residents to make journeys to see family and friends and to access services to improve their own outcomes, such as education, employment and health and wellbeing services.
2. In addition to services that can be accessed by the wider public, such as Surrey's bus network, we also have statutory duties to support some residents who may have challenges with making the journeys they need to through our travel assistance services. We support children and young people (CYP) to access education through our home to school travel assistance (H2STA) service. We also provide travel assistance to service users of Adult Social Care (ASC) where this is assessed as an eligible need under the Care Act 2014. Spending on all the above services is around £70m a year.
3. As of June 2023, we support almost 12,500 residents to travel to education, social or employment destinations. 11,849 of them are supported by the H2STA service of which 4,934 (42%) have additional needs and disabilities. The remaining clients are in ASC, with the majority of them using our learning disability and autism services or transitions service<sup>1</sup>, and have transport, or other travel assistance, provided as part of their care package.S

### **Case for a medium-term travel assistance strategy**

4. Travel assistance budgets are under severe pressure and pose a risk to our medium-term financial sustainability. Our services are experiencing, and will continue to experience, demand from more residents who need our support. Other recent pressures, such as high inflation, a national shortage of drivers and contracts being

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<sup>1</sup> The Transitions service supports residents with Education, Health and Care Plans (EHCPs) and have a diagnosed disability (learning, physical, sensory impairment or autism) to support them in preparing for adulthood.

handed back to the council from providers, have impacted our costs and reduced the competitiveness of the transport provider market in Surrey.

5. The H2STA service in particular has been severely financially affected. At the close of the 2022/23 financial year, the service had overspent by £12m against the £39m budget set at the start of the year. These financial challenges are not unique to Surrey. The key factors impacting the service were significant increase in demand (from children and young people with additional needs and disabilities returning to education following the Covid pandemic), increased demand from CYP with additional needs and disabilities and inflation levels that were significantly higher than budgeted for originally, as well as contracts being handed back to the council and having to be reprocured at much higher prices.
6. Urgent improvement work is already underway in the H2STA service and is leading to positive early results ahead of the new academic year in September 2023. Some examples of improvements achieved to date include:
  - Full restructure of the H2STA service, which included merging teams and processes to improve case management from application to delivery.
  - Improved resource planning across the end-to-end system to deliver as smooth a start to the academic year as possible.
  - Strengthened communications with CYP and families, and improving their service experience, such as through improved customer contact, complaints and appeals processes and using data and insight to remove the need for 850 families (pre and post 16) to reapply for transport in 2023.
7. We need to build on this early progress to reach our goal of having a financially sustainable travel assistance delivery model while continuing to meet the needs of residents who access them. The medium-term strategic challenges and opportunities facing travel assistance services, as well as the current financial context, means there is a strong case for rethinking and redesigning the way we plan, commission and deliver travel assistance. The current model is unsustainable financially, does not prioritise independent travel and does not support our work to reduce carbon emissions from transport.
8. These five strategic drivers are the ones we think will be most important and have the greatest impact on travel assistance services over the medium-term:
  - Shaping a more competitive local transport market
  - Enabling a greener future and the national drive to deliver net zero carbon emissions.
  - Growth in technologically-enabled transport solutions, such as Digital Demand Responsive Transport (DDRT).
  - Evolving nature of demand with changing complexity of need, volume and resident expectations.

- Opportunities to develop more services with communities to respond to the issues in the places they live and work.

### Freedom to Travel Strategy

9. Our response to these strategic drivers is presented in a new strategy called Freedom to Travel, attached as Annex A. The fundamental aim of this strategy is for all residents who need travel assistance to be able to access opportunities that make their lives better so no-one is left behind. It is a strategy for the medium-term that will take around five years to deliver due to the complexity of changes required and level of ambition.
10. Freedom in this case means developing more choices and opportunities that residents have confidence in that means people who require travel assistance are still able to travel to their destinations while we seek to reduce the costs of providing travel assistance and over-reliance on private vehicles to get to them.
11. This does not mean that we will stop commissioning the use of vehicles altogether. The acuity of client needs and distance from their destination are among the factors that will continue to inform the travel assistance solution that they need, and the use of a minibus or other vehicle may continue to be necessary. This strategy aims to strengthen choice for how some service users are supported to travel that also means they benefit personally, such as equipping residents with lifelong skills to travel independently and enables them to further reduce their own carbon footprint.
12. This strategy is connected and contributes to a broader range of strategic agendas:
  - **Prevention** – the programme will help address wider determinants of health and wellbeing by promoting and creating the conditions for travel assistance clients to use active travel methods, such as walking and cycling, to get to their destinations. People will be equipped with the skills they need to travel independently and through active travel methods, will enhance their own physical and mental health. This work also aligns with system-wide agendas, such as the Surrey Heartlands Integrated Care Strategy, which focuses on prevention and support targeted where it is most needed to stop people's health deteriorating.
  - **Local Transport Plan (LTP4)** – backing the aims of rapidly reducing carbon emissions from transport and providing well-connected communities that encourage equal access to travel to ensure no-one is left behind. A future model of travel assistance will offer solutions that emphasise independent, active travel as much as possible, and gear its commissioning approaches to align with LTP4's objectives.
  - **Empowered and thriving communities** – working with residents and other local stakeholders to develop bottom-up travel solutions with communities, organised around places, to reduce demand for council-commissioned services. Through the programme, we will seek to pilot innovative community-led approaches to travel assistance.
  - **Behaviour change** – working with residents and other stakeholders to influence when and how they travel, complementing initiatives such as schemes to incentivise active travel, making infrastructure improvements and setting up

supporting facilities to make it easier for residents to travel differently. It will also require better understanding and deeper insight on what would enable and gets in the way of changing travel habits.

13. The implementation plan for Freedom to Travel is predicated on two areas of delivery. Further detail on the approach to delivery is set out in paragraph 14.:

- **Reducing demand for commissioned transport** – Commissioned transport comprises most of the costs for travel assistance services. These costs have continued to increase and will continue to do so in line with demand if no action is taken. Activities in this delivery area are focused on diversifying the travel assistance offer to residents, building on work that has already started, particularly in the H2STA service. It will focus on strengthening and enabling independent travel, simplify public information for travelling around Surrey, give staff and partners greater clarity on how to meet resident needs in a financially sustainable way and pilot different approaches with communities for resolving local travel issues.
- **Shaping a competitive transport market** – Activities in this area are focused on reforms to our approach to commissioning and working with suppliers and providers to develop a market that offers better value for money, competition and choice in Surrey. This means reviewing and changing our procurement and commissioning approaches for transport and travel, working with partners to assess collaborative opportunities for joint planning, commissioning and asset sharing, having a clear strategy in place for working with local suppliers and capitalising on new transport developments, such as DDRT, and the roles they can play in a contemporary travel assistance offer.

### **Our approach to delivery**

14. The implementation will follow five main areas. Each will be led by a Project Manager and will include subject matter experts internally and externally to assist with development and delivery. Cross collaborative working is essential to the success of the programme and will form an integral part of the planning and delivery process. Consultants may be engaged in specialised areas. As the work develops, further consideration will be given to the dependencies and resource requirements.

Monthly, a cross-Directorate Freedom to Travel Programme Board, chaired by the Joint Executive Director for Adult Social Care and Integrated Commissioning, will meet to consider progress and monitor risks of these five main areas of work.

- Culture and Behavioural Change
  - Behavioural Insights
  - Communications strategy and delivery with partners
  - Community Collaboration
- Travel independence and prevention
  - Review and renew Travel policy
  - Strengthening independent travel training
  - Expansion of personal travel budgets for Children
  - Expansion of personal travel budgets for Adults
  - Bike grants or bike loans

- Commissioning model
  - Renew current model
  - Procurement Strategy
  - Strengthening supplier Strategy in collaboration with partners
  - Dynamic Purchasing system
- Funding opportunities
  - Commercial strategy (including fleet utilisation)
  - Exploring and utilising government grant funding
- Locality and Route planning
  - Route planning Review
  - Infrastructure improvements including safer routes
  - Technology review to support route planning
  - Locality and place based planning pilot

Detailed benefits will be outlined as the planning work progresses but the guiding principles will be:-

- Evidence-based, enabled by strong data, insights and performance management
- Designed with communities
- Supported by efficient and effective processes and back-office systems
- Entering new, and strengthening existing, partnerships focused on outcomes and benefits
- Changing stakeholders' behaviours and expectations over the long-term

And will support the Council's objectives of:-

- Tackling health inequality
- Growing a sustainable economy
- Enabling a greener Future
- Empowering communities
- Delivering Service improvements

<b>Consultation:</b>
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15. The Freedom to Travel Strategy has been developed with input from:

- Cabinet Members
- Corporate Leadership Team
- Freedom to Travel Board
- Home to School Travel Assistance Oversight Board
- A strategy development workshop in May 2023 with key staff members involved in planning, commissioning and delivery of travel assistance
- External partners such as representatives from the Surrey Heartlands Integrated Care System and community transport providers.
- Surrey County Council officers within Adults and Childrens Services, Transport and Environment, Greener Futures, Waste, Active Travel, Land and Property, Finance and Legal teams.

16. An all-Member Seminar to raise awareness of the Freedom to Travel Strategy took place on 17 July 2023. Select Committee Chairs will also be briefed on the Strategy and implementation plan at a meeting of the Chairs Group on 21 July 2023.

17. This strategy has also been socialised with local organisations who work closely with some of the clients affected by this strategy. This includes:

- The Sunnybank Trust
- Surrey Choices
- Family Voice Surrey
- Surrey Coalition of Disabled People

<b>Risk Management and Implications:</b>
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18. The key risks for the Freedom to Travel programme and mitigating actions are set out in the table below:

	<b>Risk description</b>	<b>Mitigating actions/Strategy</b>
1.	Reputational: Changes to services without suitable engagement will damage Council reputation with discontent and conflict amongst residents	<ul style="list-style-type: none"> <li>• Behavioural insights work is planned. This will capitalise on the work already underway internally. External consultants may be required to support the work.</li> <li>• Continuous engagement with external stakeholders will be essential, including engaging with residents, headteachers and local Members, to inform and engage with Surrey residents.</li> <li>• The timing and messaging will be appropriately managed by the programme team as well as any transition periods to ensure best success.</li> </ul>
2.	Cross Directorate collaboration within SCC	<ul style="list-style-type: none"> <li>• Appropriate programme governance will be in place to monitor progress and will include a monthly Board meeting as well as several Working Groups.</li> <li>• Members of the Freedom to Travel Board and Working groups will represent all the directorates involved.</li> <li>• Risks, issues and action logs will be discussed as standard agenda items.</li> <li>• Significant areas of risk will be raised with the Senior Responsible Officer and/or Executive Sponsor at the earliest opportunity.</li> </ul>
3.	Partnership working – external providers and suppliers	<ul style="list-style-type: none"> <li>• The Programme Lead will be assigned to develop and manage relationships effectively.</li> <li>• Scope and expectations will be clearly defined to offer best success.</li> <li>• Internal procurement and legal teams will support the onboarding where appropriate.</li> </ul>
4.	Net zero carbon target: Reduction not as expected	<ul style="list-style-type: none"> <li>• All elements of the programme will be developed with the greener future agenda in mind.</li> <li>• Sustainability workshops will be held to explore opportunities available to reduce carbon emissions throughout the programme.</li> </ul>
5.	Expanding scope	<ul style="list-style-type: none"> <li>• This is an ambitious programme with far reaching opportunities. As such, there will be close scrutiny, via the Freedom to Travel Board, to ensure that</li> </ul>



	<b>Risk description</b>	<b>Mitigating actions/Strategy</b>
		programme activity aligns with the original aims and objectives.
6.	Programme Budget and Management - Market volatility: inflation and relationships	<ul style="list-style-type: none"> <li>• Budget monitoring will be monitored by the Freedom to Travel Board.</li> <li>• Finance representatives will form part of the Board.</li> </ul>
7.	Delays to project timescales from approval, procurement, resourcing or other factors will impact costs and delivery timelines	<ul style="list-style-type: none"> <li>• Project timelines and dependencies will be developed and managed closely and reported monthly to the Board.</li> <li>• There will be a mechanism for managing exceptions outside the monthly reporting cycle.</li> </ul>
8.	Expected efficiencies not realised	<ul style="list-style-type: none"> <li>• The initial suggested efficiencies will be more clearly articulated as the detailed design work progress continues.</li> <li>• Considered engagement with relevant directorates, teams and parties throughout the business case development phase will carefully articulate benefits and efficiencies proposed.</li> <li>• These efficiencies will be monitored throughout the lifecycle of the programme.</li> </ul>
9.	Resource requirements: Insufficient resource to ensure complexities are managed and completed effectively	<ul style="list-style-type: none"> <li>• A number of experienced Programme and Project Managers will be required to support the programme and ensure success.</li> <li>• Where possible, internal SCC resources with good working knowledge of the subject matter will be utilised to support the work.</li> <li>• Some external consultants will be engaged to support in specialised areas.</li> <li>• As programme implementation progresses consideration will be given to any additional costs and requests will be via business cases where appropriate.</li> </ul>

**Financial and Value for Money Implications:**

19. Details of the investment requirements and potential financial efficiencies for Freedom to Travel are attached as Annex C. These will be iterated and confirmed as the Strategy progresses.

**Section 151 Officer Commentary:**

20. Significant progress has been made in recent years to improve the Council's financial resilience and the financial management capabilities across the organisation. Whilst this has built a stronger financial base from which to deliver our services, the increased cost of living, global financial uncertainty, high inflation 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 be forward looking in the medium term, as well as the delivery of the efficiencies to achieve a balanced budget position each year.

21. In addition to these immediate challenges, the medium-term financial outlook beyond 2023/24 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.

22. As such, the s151 Officer supports the Freedom to Travel Strategy. Budgetary implications and investment decisions (as set out in Annex C) will need to be taken into account as part of the Medium-term Financial Strategy decisions.

#### **Legal Implications – Monitoring Officer:**

23. The strategic nature of the plan that Cabinet is being asked to endorse means that there are no immediate legal implications to consider. However, given that the intention is to change the way in which some transport services are delivered, once plans are finalised it is highly likely that they will require public consultation and further specific decisions from Cabinet. Further advice in relation to legal implications will be provided at that point.

#### **Equalities and Diversity:**

24. An Equality Impact Assessment (EIA) for the Freedom to Travel Strategy is attached (Annex B). As projects within the programme are progressed and scoped, there will be a requirement for each project to produce their own individual EIAs where there are direct equality implications for residents and staff.
25. Agreeing the strategy does not in itself result in direct equality implications for residents. However, at this stage, it is anticipated that the programme will have positive and negative impacts on the protected characteristics of 'Age' and 'Disability'. In addition, it is anticipated there will be impacts on equality characteristics that are not protected by the Equality Act 2010, such as Looked After Children and residents living in rural and other isolated communities.
26. Positive impacts include:
- A diversified travel assistance offer that emphasises information, skills and tools designed to support independent travel. These will include a strengthened Independent Travel Training offer and supporting more residents with Personal Travel Budgets. These will contribute to improved physical, emotional and mental wellbeing as well as supporting residents to reduce their carbon footprint.
  - Encouraging uptake of travel modes that support improved health and wellbeing, such as walking and cycling schemes and DDRT. These travel modes will contribute towards improved health and wellbeing for residents who use active travel, and improve opportunities for residents in more isolated communities to improve access to Surrey's wider public transport network.
27. A negative impact that cuts across protected characteristics will be reductions in commissioned transport the council can offer. Potential impacts may include heightened stress and anxiety among residents who have been receiving transport as part of their travel arrangements. Changes to routine for some residents may trigger sensory reactions, as well as journeys potentially taking longer when compared to transport in a private vehicle. It is recognised that commissioned transport may be the only viable solution for some travel assistance clients.

**Other Implications:**

28. 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.

<b>Area assessed:</b>	<b>Direct Implications:</b>
Safeguarding responsibilities for vulnerable children and adults	<p>As Freedom to Travel aims to encourage more providers into the marketplace, the Transport Coordination Centre (TCC) will continue to ensure that rigorous checks and controls are applied to ensure drivers employed to work with vulnerable children and adults are suitable. This includes an assessment of any criminal history, information from Safeguarding teams, and previous history of applicants held by TCC and additional checks, such as an applicant's right to work in the UK.</p> <p>Drivers approved by the TCC will also need to have completed the Barnardo's Safeguarding Adults and Child Sexual Exploitation Training and provided relevant certification to the TCC.</p>
Compliance against net-zero emissions target and future climate compatibility/resilience	<p>As the Freedom to Travel programme is implemented, performance measurement will include metrics to assess the extent to which reductions in the use of commissioned transport is supporting transport carbon emissions reductions. It is anticipated that by supporting residents to switch from using private transport to public transport or active travel, this will enable reductions in emissions to be achieved to support the Local Transport Plan 4 and Climate Change Strategy.</p>
Public Health	<p>If the programme successfully persuades more travel assistance clients to use active travel schemes, long-term use could lead to positive benefits for residents' physical, emotional and mental health. In particular, by encouraging children and young people to use these schemes, these have the potential to support development of lifelong travel habits that are conducive to improved health and wellbeing and reduce the risk of health issues later in life.</p>

## What Happens Next:

29. If Cabinet approves this report, the Freedom to Travel Delivery Programme will be initiated with a full Business Case being completed by the end of July. This will be informed by the exploratory and analytical work undertaken to date. The Freedom to Travel Board and Programme Sponsor will sign off the Business Case. At this point the Business Case will then be submitted to the Transformation Unit for funding and formal approval of the programme.

As the implementation work develops, further consideration will be given to any Business Cases requiring Cabinet approval.

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### **Annexes:**

Annex A: Freedom to Travel Strategy

Annex B: Freedom to Travel Equality Impact Assessment

Annex C: Freedom to Travel Financials

### **Sources/background papers:**

Surrey's Climate Change Strategy

Surrey Health and Wellbeing Strategy – update 2022

Surrey Heartlands Integrated Care Strategy

Surrey Local Transport Plan 4

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