

## BARNSLEY METROPOLITAN BOROUGH COUNCIL

This matter is not a Key Decision within the Council's definition and has not been included in the relevant Forward Plan

### Report of the Executive Director of Place to Cabinet

#### Home to School Travel Assistance Policy 2018 – 2020 – Personal Travel Budget report.

#### **1. Purpose of report**

- 1.1 The purpose of this report is to summarise the outcome of the pilot Personal Travel budget (PTB) scheme launched in September 2018 and to seek approval to making the scheme a permanent addition to the suite of travel assistance options contained in BMBC's Home to School Travel Assistance Policy 2018 – 2020.

#### **2. Recommendations**

- 2.1 That Cabinet approves that:
- 2.2 The pilot Personal Travel Budget Scheme which commenced in late September 2018 has been successful and that the rate of pay trialled in the pilot (60p per mile x two return journeys per day for the shortest distance between the pupil's normal place of residency and school) be confirmed as the rate of pay in the permanent PTB scheme.
- 2.3 The Group Manager Travel Assistance has delegated powers to increase the standard offer in exceptional circumstances providing it remains economically viable to do so, with the Service Director (Environment and Transport) as the accountable officer.
- 2.4 That the threshold for adjustment to payment for non-attendance is set at below 90% for the term.

#### **3. Introduction**

- 3.1 BMBC has a statutory duty under section 508A and 508D of the Education Act 1996 (amended by the Education and Inspections Act 2006) to ensure that travel assistance as it considers necessary are made to facilitate attendance at school for eligible children or students. BMBC's Home to School Travel Assistance Policy 2018 – 2020 (approved February 2018) sets out BMBC's arrangement for facilitating this duty.
- 3.2 For children and students with Special Educational Needs and Disabilities (SEND) a menu of travel options is included in this policy. These are independent travel training, mileage reimbursement, personal travel budgets, school minibus, taxis or

zero fare pass. This report focuses on the PTB option seeking to determine the level of the offer and the process for obtaining it.

3.3 A PTB is a payment made to parent/carers of children as an alternative to transport provided by BMBC for primary and secondary aged children and young people eligible for home to school travel support. It is up to the families how they use the money as long as it helps their child get to school or college. Examples could include;

- Covering fuel costs including wear and tear on the vehicle;
- Paying for a shared taxis with other students, organised by the parent or carer;
- Making necessary arrangements and paying other people to take their child to school when they are unable;
- Paying for a chaperone;
- Paying for child care for other children whilst they take/collect their child where a PTB payment is being made; or
- Buying travel passes for other children so they can get to and from school whilst the parent/carer takes their child with SEN to school.

3.4 The advantage of a PTB for parents /carers is that it offers the family greater flexibility and choice than a standard council provided home to school taxi service.

3.5 Once a pupil or student has had their travel assistance approved by the Travel Assistance Panel and there is no existing available transport the option of a personal travel budget will be offered to the parent/carers. Once the family has had an opportunity to consider the personal travel budget option officers will discuss with the family if this is this appropriate for them and if not will work with the family to find a solution that is practicable for them.

3.6 A PTB can be set at any level as long as it is made clear that it is not a mileage payment if it is to be set above the HMRC threshold. It should not have any tax implications as it is a sum of money that is paid for the child in lieu of transport arrangements to school and is not designed to provide the family with any financial gain.

3.7 In September 2018 approval was obtained to launch a pilot Personal Travel Budget scheme based on 60 pence per mile for 2 return journeys for the shortest distance between the pupil's normal place of residency and the nearest school. In line with BMBC Home to School travel assistance policy a PTB will be offered where there is no existing form of transport available such as a taxi or minibus with a spare seat. Unfortunately the pilot scheme launch date missed the August travel assessment panel when the highest numbers of children approved for travel assistance in time for the start of the new academic year is traditionally made, limiting potential opportunity for the PTB pilot scheme.

3.8 Between September 2018 and March 2019 a total of 27 PTB's were offered and 24 (89%) were taken up, equating to 3.6% of the total number of pupils receiving travel assistance which is a positive start. A survey of the views and experiences of

the parents / carers who elected to take part in the pilot was carried out and the results can be found in appendix B.

- 3.9 The majority of the parents in the survey could think of no improvements that needed to be made to the scheme. A few stated that they were never sure when the payment was going to land into their account causing a minor issue for them. Currently the payments are made according to parent/carers wishes e.g some like it to be paid in arrears and some like it up front. Some are happy to be paid for the entire term and others like it half termly. It is clear that this random method is not working because it is difficult for officers to keep a track on when someone needs payment and even parent/ carers themselves find it hard to keep track. It is proposed therefore that the payment will be standardised to the start of each half term. At the end of the term the child's attendance at school will be checked. It is recommended that the threshold for adjustment to payment is altered from 85% (contained in the pilot scheme) to a minimum of 90% to tie in with the threshold for a child being considered permanently absent. If it has fallen below, the figures will be adjusted for the next payment. If a child continues to have low attendance rates we will write to parents warning them that if attendance continues to be low the PTB will be withdrawn. Once a child is recording a low attendance additional attendance monitoring checks will be put in place in conjunction with the school and EHCP team.
- 3.10 A couple of other comments made was that we needed to have a degree of flexibility around the 60p per mile offer because there may be extenuating reasons why a top up is required such as a carer needs to be provided to travel with the child, or a wheelchair accessible vehicle is used which can be more expensive to run. It is proposed therefore that the Service Director Place and Group Manager Travel Assistance can consider these particular requests and agree to pay an additional amount if required, as long as it continues to remain economically viable to the Council.
- 3.11 The overall outcome of the survey was very positive. A key point to note is that parents /carers were asked to score the scheme out of 10 (10 being excellent) and the average score given was 9.6. This is a strong endorsement of the scheme from its users and importantly all of them wanted the scheme to continue.
- 3.12 Between mid-September 2018 and 31 March 2019, due to the take-up of personal budget transport payments, the Council has reduced its costs by £34k. If this scheme had been in place for the entire academic year this reduction in costs could have been in the region of £75k.

#### **4 Proposal and Justification**

- 4.1 It is proposed to make the personal travel budget scheme a permanent fixture in the suite of travel assistance offers for home to school transport and to retain the current rate of 60 per mile for 2 return journeys over the shortest distance between home and the nearest school.
- 4.2 It is also proposed that the Group Manager Travel Assistance has delegated powers to raise this offer in extenuating circumstances for example to cover the additional running costs of a wheelchair accessible vehicle, or the cost of a carer to travel with the child if required, as long as the overall cost of the personal travel budget remains

economically viable for BMBC with the Service Director (Environmental and Transport) as the accountable officer..

- 4.3 In order to qualify for a PTB the travel requirements of the student needs to be over a long period of time. There will be cases where a child requires temporary travel assistance for example where a child is moved to a different school as a “managed moved” for a short period of time. This is where two schools agree to exchange a pupil for a period of time as a prevention measure to the pupil being permanently excluded from their school. Under the Fair Access Protocol BMBC may have to provide travel assistance and in occasions such as this a temporary mileage payment will be offered.
- 4.4 PTB’s will only be offered where we are unable to fit a child onto an existing route, unless the cost of the PTB is less than the increase contract cost for accepting the child onto the vehicle, for example the cost of increasing the size of vehicle on a route. The cost of a PTB must also be no more than the cost of a single occupancy taxi contract. Occasionally a child may have severe anxiety about travelling on school transport and in these situations even though there is space available the parent/carer will be offered a PTB.
- 4.5 Sometimes a parent/carer may approach the team to request that their child is taken off transport and given a PTB instead. Unless there is an urgent reason for doing this such as the child is experiencing bullying the request will be deferred until another child requires a seat.

## **5 Consideration of alternative approaches**

- 5.1 Do nothing – The revised Home to School Travel Assistance policy 2018 – 2020 (approved February 2018) contains the proposal to offer PTB’s to parents / carers as an alternative option to a minibus or taxis where it is a cost effective way of arranging for a pupil to get to school. Not setting a rate and establishing the process for the PTB will mean that officers will be unable to fully comply with the policy, causing potential distress to some families.
- 5.2 Set the PTB at a lower amount for example 50p per mile but open it to all parent/carers regardless of whether their child has a seat on transport. This would be a more equitable system but the incentive for families to take up this offer would be reduced and would not be much different to the existing mileage reimbursement scheme which parents are able to request regardless of whether there is a place on existing transport.
- 5.3 Set the PTB at a higher rate than 60p per mile. The level of the PTB will be reviewed each year but currently it appears to be working well at 60p

## **6. Implications for local people and service users**

- 6.1 An Equality Impact Assessment was prepared for the Home to School Travel Assistance Policy 2018 – 2020 (February 2018). It highlights the key inequality issue that remains unresolved is the lack of transport to enrichment classes and after school clubs. A number of parents/carers have commented that because their child or children use school transport due to their disabilities, they are unable to access these clubs like mainstream children. This is particularly concerning when schools advise that attendance at enrichment classes may help to improve their

child's grades. The provision of transport for these activities would be a discretionary element which is not offered in the Home to School Travel Assistance Policy. However the introduction of PTB's in the policy does offer parent/carers flexibility with the transport, for example they could choose to accept a PTB or mileage reimbursement which would enable them to build in after school club times into the daily journey and goes some way to redressing this potential inequality.

## **7 Financial Implications**

- 7.1 Consultations have taken place with representatives of the Service Director – Finance (S151 Officer).
- 7.2 Based on this trial of 24 pupils which commenced in September 2018, the reduction in cost to the service during the six month period to 31 March 2019 was £34K. Over a full academic year, based on the PTB for these 24 pupils alone this saving is expected to be approximately £75K. The amount is greater than two times the £34k due to timing differences around the actual start date of each plan in 2018.
- 7.3 There is an expectation that pupil numbers requiring this service will increase. So, if this scheme is extended as detailed in section 4, then further savings could be achieved in future years. The savings will depend on take up rates and the amount saved on each individual plan. It is therefore difficult to quantify the total saving at this stage. Any savings will help offset inflationary pressures and increases due to additional pupil numbers.
- 7.3 A summary of the above financial implications is attached at Appendix A.

## **8 Employee implications**

- 8.1 In the present and foreseeable future demand is expected to rise for children who are or will be eligible for Travel Assistance. This will mean that additional resources will need to be provided to support service users. It is anticipated that this additional resourcing will be focused around managing the service.

## **9 Legal Implications**

- 9.1 There is a risk that we may have to end up recovering funds if the recipient of a PTB fails to abide by the terms and conditions. The potential risk to the Council is reduced by paying in half termly instalments because the sums of money required to be recovered will always remain small. It states on the terms and conditions that the agreement is a legally binding contract between the recipient and BMBC and can be enforced through the courts.

## **10 Customer and Digital Implications**

- 10.1 There are no specific customer and digital implications.

## **11 Communications activity**

- 11.1 Information about PTBs including frequently asked questions will be placed on the website in the school transport section

## **12 Consultations**

- 12.1 As part of the preparation of the Home to School Transport Policy 2018 – 2020 a comprehensive engagement process was undertaken. This included the proposal to include PTBs as part of a menu of travel options to be offered to families with children eligible for school travel assistance.
- 12.2 Once a formal parent/carer forum has been established it is the intention to co-produce a set of guidelines for home to school transport and the operation of the Personal Travel Budget will be included.
- 12.3 Officers in the People Directorate have been consulted on the proposal via the Home to School task and finish group.

## **13 List of Appendices**

- 13.1 Appendix A – Financial implications
- 13.2 Appendix B - Pilot Personal Travel Budget parent/carer survey

## **14 Background Papers**

- 14.1 Home to School Travel Assistance Policy 2018 – 2020
- 14.2 Home to School Travel Assistance Policy 2018 – 2020 Personal Travel Budget report pilot scheme. June 2018

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**Date April 2019**