

Adult Social Care Committee

Item No:

Report title:	Transport
Date of meeting:	3 September 2018
Responsible Chief Officer:	James Bullion, Executive Director of Adult Social Services

Strategic impact

The Council has responded to the financial challenges facing all local authorities through the development of a new strategy which sets out a direction for the Council to radically change its role and the way it delivers services. Adult Social Care is contributing to this vision through the Promoting Independence strategy where people are able to achieve their outcomes through the most independent means possible helping individuals and families to connect easily to the support of their communities and to stay at home longer, targeting the Council's resources where additional support is needed. The Care Act, the biggest legislative change for 60 years, shapes and informs this new approach by giving us clear and new responsibilities across the whole population of Norfolk to prevent, reduce and delay demand for social care.

Part of this includes changes to transport and savings in this area.

Executive summary

This is an update regarding the work being carried out in relation to delivering the savings from Adult Social Services transport. It needs to be read in conjunction with the reports to Adult Social Care Committee on 4 July 2016, 5 September 2016, 23 January 2017, 6 March 2017, 4 September 2017 and the updates in November 2016 and January 2018.

It recommends that Adults adopt a similar policy to Children's to ensure we treat everyone fairly and that that people take part in travel training when it is offered as there are people who we feel could benefit from travel training who are opting not to take part.

Local Authorities are responsible for preventing, reducing and delaying the need for statutory support. The implementation of the Care Act gives us a responsibility to the whole population of Norfolk, including carers, to provide good information about what is available. For those requiring social care our vision is for short term interventions that support people to gain skills and confidence to be able to undertake personal care and the activities of daily living and be active within their communities within individual capabilities. Adult Social Services has reframed its transport offer in line with the Care Act and the department's Promoting Independence strategy.

The department carried out actions in line with the budgets agreed by Council to deliver the transport savings however this did not result in the level of transport savings required in previous years. The department did appear to be managing demand in this area, as expenditure did not increase despite overall there being an increasing demand for services, and some savings were achieved. However, the cultural shift was taking time to embed and therefore at the Adult Social Care (ASC) Committee on 4 September 2017 the ASC Committee agreed to amend the transport savings to £0.700m in 2018-19 (from £3m) and £1m in 2019-20 (from £0.800m) and that the difference of £2.1m in savings would be met through the purchase of care budget from changes to patterns of care.

The year-end position for 2017-18 was a £-0.813m underspend on Transport. This is viewed as earlier than anticipated delivery on the 2018-19 savings and part of the 2019-20 savings. The current forecast for 2018-19 is that transport is on budget.

Recommendations:

Adult Social Care Committee Members are recommended to agree that:

- a) **All transport requirements for adult service users are referred to the TITAN travel training team and part of the assessment of transport needs includes the potential for the person to travel on public services or contract buses following travel independence training**
- b) **All service users are expected to undertake travel independence training to enable them to progress to using public transport unless they are assessed, by the County Council, as being unlikely to benefit from such training**
- c) **Any person assessed as being suitable for travel training is expected to willingly participate. The County Council will retain the right to withdraw specialist transport if people or their families choose not to take part in the travel training programme or assessment**

Appendix One - TITAN Case Studies (page 52)

1 The Care Act

1.1 Adult Social Services has a legal duty to provide transport to service users who are eligible for social care support in certain circumstances. The Care Act 2014 states:

“Local authorities should consider the adult’s ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing.”

1.2 Transport is a means of accessing other services or support. The overriding principle is that the decision to provide transport is based on a person’s individual circumstances including: needs; risks; outcomes; and promoting independence.

1.3 Norfolk County Council’s role should be to:

- a) help our customers to access services by the most suitable transport available
- b) help people live as independently as possible
- c) help people to develop new skills, and take risks that are positively managed, thereby building confidence
- d) promote the development and use of local services which result in a reduction in distances travelled and time spent travelling
- e) improve health and well-being through community and social inclusion
- f) ensure the efficient use of resources
- g) reduce the numbers of people using council funded transport to services where they are capable of travelling more independently
- h) provide guidance and support to individuals to look at their transport needs as part of their support plan

1.4 There is an expectation that service users will meet their own needs for transport to access and take advantage of services, or support to facilitate them.

2 Work to Date

2.1 In line with the budgets agreed by Council to deliver the transport savings the department has:

- a) reduced the funding allocated for transport in the Resource Allocation System (RAS) from 1 April 2014. The RAS calculates the indicative personal budget allocation. The reduction was implemented with immediate effect for new service users and from time of annual review for people who were already service users
- b) Started using a new policy from 1 April 2015:

- i. Making sure people are using their Motability vehicle or mobility allowance for their transport
- ii. Asking people to use public transport or community transport where we assess that they are able to do this
- iii. Asking people to use the service that is closest to them if this will meet their needs, for example, their local day centre. If they don't want to use the local service as they prefer to use a service that is further away, we will not pay for them to travel there
- iv. If we cannot find a service that meets people's needs in their local area we would not automatically pay for them to travel a long way to get the service elsewhere. Instead we would work with the person who needs the service and their carer/s to come up with a more creative solution that involves less travel
- c) The project team reviewed information and identified potential savings from transport packages for individuals that seem expensive and not good value for money. This information was shared with the locality teams to help inform their reviews/reassessments of people
- d) Ensured it is charging people who fund their own social care but where NCC provides the transport
- e) Adult Social Services has reframed its transport offer and arrangements in line with the Care Act and the department's Promoting Independence strategy, and to enable it to focus on statutory priorities. ASC Committee agreed on 6 March 2017 a Transport Policy and revised Guidance for social care staff. For new people eligible for adult social services this policy came into effect on 5 April 2017. For existing people getting adult social services funding, this policy is being introduced in a gradual manner as part of their annual review and reassessment

3 Current Work

3.1 Transport Offer

NCC needs to provide good information about transport to help prevent, reduce and delay the need for ongoing support. The department has put its transport offer to the resident population onto the NCC website. This helps to clarify and strengthen the Council's responsibility to the wider resident population.

3.1.1 The Transport offer includes information about: buses and trains; concessionary fares; senior bus pass or railcard; a disabled persons bus pass or railcard; shop mobility; taxi services; Norfolk Community Transport; Blue Badges; Motability Cars and Mobility allowances; Car Tax Exemption; when the NHS provides help with travel and transport costs.

3.1.2 It also describes to people what happens if they are deemed to have a need as outlined in the policy and their needs cannot be met by the above. The link to the Transport offer is: [new transport web page](#)

3.2 Lease cars

The project team identified 17 cars that NCC leases for adult service users. Some of the original lease periods have expired and the vehicles are effectively now on a rolling yearly lease. The lease cars are a relatively expensive transport option, especially when the people are probably eligible for a Motability vehicle or in some cases have one as well. The lease cars are old now and expensive to replace/maintain. The project asked locality teams to work with people to put alternative transport in place so that we can hand the lease cars back. There are potential savings of £0.100m pa if all 17 lease cars are returned. The savings are dependent on working with each person and alternative transport arrangements being in place. To date 11 lease cars have been returned.

3.3 **Travel Viewer**

IMT (Information Management and Technology) have developed the first version of a Transport application for use by Adult Social Services and Travel and Transport where you can see for each day centre where people are travelling from, whether they are travelling alone/with others and which day services other people charged to that budget code are going to. It is based on an application IMT developed for Children with Special Education Needs. The application looks useful, and provides a clearer picture of transport provision than analysing pages of reports. The application will be trialled with Business Support initially.

3.4 **Internal Audit**

BDO (Binder Dijker Otte) carried out an audit of Adult Social Services Transport on behalf of Norfolk Audit Services (Internal Audit) towards the end of 2017. The audit included looking at:

- a) the reporting of the budget position
- b) whether social care staff are complying with the Transport Policy and Guidance, agreed by ASC Committee in March 2017 when assessing the needs of service users
- c) contracts for adult social services transport services are procured and awarded in accordance with the Council's procurement procedures
- d) Adult Social Services contractors' performance is monitored against Key Performance Indicators (KPIs) set out in the contract
- e) Transport network reviews are robust and where potential savings are identified, actions are taken to ensure savings are realised

3.4.1 The audit opinion was that internal controls governing the Adult Social Service Transport are **Acceptable**. Two areas were identified for improvement in Adult Social Services:

- a) The use of demand forecasting in the budget setting process. The savings programme has considered interventions and the potential impact on reduction in costs. The 2018-19 proposed budget has been set based on this. Due to the need to radically change the approach to transport and the introduction of the revised transport policy in 2017, it has not been considered appropriate to project demand based on historical data and approaches. Once the savings have been delivered and the budget reflects the revised transport policy it will possible to include the transport budget within the normal demand forecasting that is applied to other purchase of care budgets
- b) Documentation of conversations with service users regarding transport needs on the Council's adult social services case management system, ie Liquidlogic

3.5 **Assessments, reassessments and reviews**

For existing people getting Adult Social Services funding, the reframed policy is being introduced in a gradual manner as part of their annual review and reassessment. Delivery of the bulk of the savings is dependent on social care staff doing a high enough volume of re-assessments/reviews and having the conversations with new and existing service users based on the Transport Policy and Guidance.

3.5.1 Signs of Wellbeing is Adult Social Services' approach to achieving a strengths based approach to assessment, review and support planning. Our social care staff have been provided with processes, tools and training to help them hold Signs of Wellbeing conversations with people.

3.5.2 In the context of transport, this means that practitioners should consider a person's own strengths, resources and networks to enable them to access activities that help them

achieve greater wellbeing and meet the eligible needs for care and support under the Care Act.

3.5.3 In practice, this might mean encouraging the person to use the mobility component of their benefits or their mobility vehicle, accessing voluntary or community transport schemes, or using public transport – for which we can provide ‘transport training’ if this is required. Our aim is to promote the person’s independence and help equip them to take an active part in the life of their own communities.

3.6 TITAN (Travel Independence Training Across the Nation) Travel Training

TITAN is a travel training programme, set up by Children’s Services, which was devised to assist students over 16 years old who have problems using public transport. It enables students to raise their levels of confidence and self-esteem, and gives them the opportunity and entitlement to be proficient in independent travel skills. Travel Training staff train ‘in-house’ trainers, provide ongoing support to schools/establishments and monitor progress at each establishment. Although this scheme had been used in the past by some Adult Social Services day services and providers, it seemed that Adults could use more of this training to enable people to use public transport rather than having transport provided.

3.6.1 TITAN can demonstrate significant transport savings in Children’s Services but was untested in adults. The department is working with TITAN for a fixed term initially so potential savings can be evaluated.

The TITAN team is working with some individual day services for people with Learning Difficulties to free up buses and allow these to be decommissioned. The TITAN team has identified service users at the day services it thinks will benefit from travel training, agreed with people that they will take part and has started working with them in.

The training will help build the person’s confidence in other aspects of their life such as: future job opportunities; accessing new hobbies; and social skills.

3.6.2 By July, the TITAN team had:

	Number of people
Total Assessed	380
Assessed as not suitable for travel training	258
Assessed as suitable for travel training	116
People who have opted not to undertake travel training	29
People being travel trained	45
People who have been travel trained and are independent, awaiting a social care review	16

Appendix One has some examples of the difference undertaking travel training has made to people.

3.6.3 Children’s found that people and their families can be reluctant to undertake travel training as they are concerned about the consequent reduction in provision of transport or funding. The Children’s department’s policy is:

- a) All transport requirements are referred to the TITAN travel training team and part of the assessment of transport needs includes the potential for the student to travel on public services or contract buses following travel independence training
- b) All service users are expected to undertake travel independence training to enable them to progress to using public transport unless they are assessed, by the County Council, as being unlikely to benefit from such training
- c) Any young person assessed as being suitable for travel training is expected to willingly participate. The County Council will withdraw specialist transport if students or families choose not to take part in the travel training programme or assessment

Although there may be some reluctance initially by people supported by Children's Services to take part in travel training, by the end of the training people and their families are convinced of the benefits.

- 3.6.4 In the Transport report to Adult Social Care Committee on 4 July 2016, when Adult Social Services were considering working with TITAN, the then Director recommended to the Committee that they agree that if people are assessed as being suitable for travel training (to safely use public transport) and they will not participate in the travel training, the department will not fund the transport for that person going forward. This was to ensure that people take part in travel training when it is offered. The Committee did not agree this at that time, wanting to wait until there were some results of TITAN working with adult service users.
- 3.6.5 As can be seen at 3.7.2, there are a significant proportion of people (25%) who although have been assessed as suitable for travel training are opting not to participate in it. Adult Social Services wish to adopt a similar policy to Children's to ensure that we treat everyone fairly and that people take part in travel training when it is offered as there are people who we feel could benefit from travel training who are opting not to take part. These people and potentially their families/carers will not benefit from the increased independence travel training brings and the department will not achieve all the savings it could make.
- 3.6.6 Changing current transport arrangements from taxis or existing transport arrangements to the use of public transport, is consistent with the guidance in the Care Act. Councils have legal duties under the Care Act to promote independence and to prevent, reduce and delay the need for care and support through formal services. However, in each case we will, as usual, need to consider the needs of the individual and take all 'reasonable steps' to agree the changes with the service users and their families or carers. This means having difficult and sometimes, complex conversations with the service user or their family and may often result not just in a Care Act Review but a Reassessment of Need.

4 Financial Implications

- 4.1 At the Adult Social Care (ASC) Committee on 4 September 2017 the Committee agreed to amend the transport savings to £0.700m in 2018-19 (from £3m) and £1m in 2019-20 (from £0.800m) and that the difference of £2.1m in savings would be met through the purchase of care budget from changes to patterns of care.
- 4.2 The year-end position for 2017-18 was a £-0.813m underspend on Transport. This is viewed as earlier than anticipated delivery on the 2018-19 savings and part of the 2019-20 savings. The current forecast for 2018-19 is that transport is on budget. The budget will continue to be closely monitored and the impact of actions such as TITAN travel training and the rolling out of the Transport Policy and Guidance evaluated.

5 Issues, risks and innovation.

- 5.1 The savings on Transport rests upon a general assumption and expectation that service users will meet their own needs for transport to access and take advantage of existing services or support, including public transport. Funded transport should only be provided if, in the opinion of the assessor, it is the only reasonable means of ensuring that the service user can be safely transported to an assessed and eligible service. The overriding principle is that the decision to provide transport is based on needs, risks and outcomes and on promoting independence.
- 5.2 Even if two people make alternative travel arrangements and no longer travel on an NCC funded minibus, there might still be four people travelling which means the minibus is still required and therefore no overall savings are achieved until more people have different transport. With travel training and reassessments/reviews it is necessary to look at people in groups, eg where they travel on the same bus to a day service.

6 Conclusion

- 6.1 The department carried out actions in line with the budgets agreed by Council to deliver the transport savings however this did not result in the level of transport savings required in previous years. The department did appear to be managing demand in this area, as expenditure did not increase despite overall there being an increasing demand for services, and some savings were achieved. However, the cultural shift is taking time to embed and therefore revised savings figures were agreed.
- 6.2 As part of achieving this cultural shift, promoting independence and delivering the savings the department is working with the TITAN Travel Training team to give service users the opportunity and entitlement to be proficient in independent travel skills. This is for a fixed term initially so potential savings can be evaluated.
- 6.3 Adult Social Services wish to adopt a similar policy to Children's to ensure that people take part in travel training when it is offered as there are people who we feel could benefit from travel training who are opting not to take part.

7 Recommendation

- 7.1 **Adult Social Care Committee Members are recommended to agree that:**
- a) **All transport requirements for adult service users are referred to the TITAN travel training team and part of the assessment of transport needs includes the potential for the person to travel on public services or contract buses following travel independence training**
 - b) **All service users are expected to undertake travel independence training to enable them to progress to using public transport unless they are assessed, by the County Council, as being unlikely to benefit from such training**
 - c) **Any person assessed as being suitable for travel training is expected to willingly participate. The County Council will retain the right to withdraw specialist transport if people or their families choose not to take part in the travel training programme or assessment**

Officer Contact

If you have any questions about matters contained in this paper or want to see copies of any assessments, eg equality impact assessment, please get in touch with:

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If you need this report in large print, audio, Braille, alternative format or in a different language please contact 0344 800 8020 or 0344 800 8011 (textphone) and we will do our best to help.

Appendix One: TITAN Case Studies

Examples of what the changes having travel training means for people and Adult Social Services are shown below.

Robert

Robert's social worker contacted TITAN, asking if they could offer support and possible travel training for Robert to get to Tesco in Thetford, where he has worked for nearly 20 years as a trolley collector. Robert has been relying on his parents taking him to and from work throughout this time.

Following a home visit, Richard, the Senior Travel Trainer for Adults, began working with Robert in March. It was not going to be possible for Robert to catch a bus in the morning due to him starting work before the bus service started but it was felt that TITAN support could still be given in getting Robert home from Tesco. This was a two-stage journey with a connection at Thetford Bus Interchange.

Robert completed five journeys with Richard, the last three being 'shadow' journeys and was assessed as being an Independent traveller on 13 April 18. Robert's confidence has grown throughout his training and both Robert and his parents are now delighted with this outcome.

There was an article about Robert in the EDP on 16 May 2018:

<http://www.edp24.co.uk/news/scheme-helps-people-with-learning-disabilities-in-norfolk-travel-1-5519674>

In the article Robert's father is quoted as saying: "This has been life-changing and so helpful for the family. I had a doctor's appointment last week which normally I would have had to rearrange as it clashed with picking Robert up from work."

Although Adult Social Services were not providing commissioned transport to Robert and therefore there are no immediate financial savings to the department, it has increased Robert's independence and helped his father as a carer, as well as possibly meaning that in the future the department does not have to provide transport for Robert.

Person A

A had commissioned transport provided but had started using the public bus service when the new hub in Sheringham opened. A member of staff was travelling on the same bus each day alongside some of the other customers from Cromer. Despite feeling confident in catching the bus with support, A said he would like to know that he could get on the bus alone and travel confidently on his own if the staff member wasn't on the bus.

The Senior Travel Trainer offered A some travel training, catching a bus without staff or other customers and at a stop closer to home. In only a couple of shadow journeys, the Senior Travel Trainer felt confident that A had demonstrated his ability to travel by himself so A made his first independent journey to Sheringham Hub the very next day. A also said to his mum that he no longer felt the need for her to always meet him off the bus each day as his confidence had grown so much.

Person B

B has been attending a day centre for several years and in the early days B was quite independent living in supported accommodation. Unfortunately, B experienced a series of personal and life setbacks which resulted in B having to move into residential care and daily support, continuing with going to the day centre.

Having visited B at the day centre and introduced the idea of becoming independent B agreed to a trial journey. This was discussed with the support team at the residential home and all was put in place for the travel trainer to take B on his first journey to the day centre using public transport.

The journey went very well and it was agreed to attempt the full round journey to the day centre and return to the residential home.

Subsequently the travel trainer met B at the bus stop, and B undertook all aspects of the journey observed from a distance by the travel trainer. B was confident, competent and relaxed about the whole journey. The travel trainer arranged for B to meet at the bus station that afternoon and undertake the return journey to the residential home. B did with ease and confidence despite there being a significant disturbance on the bus and the travel trainer could give B the news that he was now independent.

Supported travel to independence in seven weeks.

Person C

C was being taken by commissioned transport to Holt Hub and then travelling with support staff on to Sheringham Hub, where he transferred to when it opened in Autumn 2017.

When the travel trainer spoke to C, he said he would like to be able to travel straight to Sheringham Hub independently so following a home visit training began with C.

C knew the bus route, number and stops and demonstrated his ability to travel on the bus independently with a couple of shadow journeys with the travel trainer. However, the travel trainer was very concerned with C's road safety as despite actively looking correctly in both directions C didn't always register whether it was safe to cross the road or not. Also, part of the walk from C's house was on the road due to having no footpath and C wouldn't keep to the edge. After a few journeys, the travel trainer spoke to C and decided to stop travel training for the time being and suggested C resume after he had completed and passed the TITAN Red Test at the Hub. This would demonstrate his ability with road safety skills and the travel trainer felt that C would be more likely to be able to travel independently. C has begun working on the Red Route and hopes to pass so he can work with a Travel Trainer in the summer.

Person D

The first centre TITAN began work with was Sheringham Learning Hub, which has clear set outcomes and learning goals for their customers to achieve.

TITAN first met D as she was attending Sheringham learning Hub, and were delighted to hear D was successfully travelling to, and volunteering almost unsupported in a local charity shop. Staff had set up this placement up, and over time D had gained confidence so much so that the Hub were able to draw back the level of support required. Things such as phoning the Hub at lunchtime to 'touch base' were gradually phased out.

At the time D was travelling by public bus from her home to her volunteering placement, but still being a customer of the Hub on that day she was starting her day there, along with the other

customers. The manager of the Hub said that D had made so much progress that she no longer required the support of the Hub to get to her placement, and was working there unsupported all day. He thought it would be great if this particular day could be decommissioned according to the progression D had made, from a fully supported environment to an independent voluntary work placement.

The manager suggested that D completed some TITAN Travel Training to ensure she was competent at completing the journeys to and from her placement independently and safely. After a home visit in which residential staff were fully supportive, D began some Travel Training with the Senior Travel Trainer. They travelled by public bus to and from D's home in Cromer, to her placement in Sheringham.

The Senior Travel Trainer observed that D was a safe road user, knew what to do in an emergency and reported that she 'demonstrated very well her ability to travel independently using the public bus service, she coped well with using a very crowded bus'.

D was thrilled to be presented with her 'Independent Traveller' award the following week at the Hub.

The Travel Training D undertook with the TITAN team meant that her day's service at the Sheringham Learning Hub could be decommissioned as she was deemed independent enough to safely travel to her voluntary work placement unsupported.