

## **NORTH SOMERSET COUNCIL DECISION**

**DECISION OF:** COUNCILLOR HANNAH YOUNG. THE EXECUTIVE MEMBER FOR HIGHWAYS AND TRANSPORT



**IN CONSULTATION WITH:** COUNCILLOR CATHERINE GIBBONS. THE EXECUTIVE MEMBER FOR CHILDRENS SERVICES, FAMILIES AND LIFELONG LEARNING.

**WITH ADVICE FROM:** THE DIRECTOR OF PLACE

**DECISION NO:** 23/24 DP 496

**SUBJECT:** PERSONAL TRAVEL ALLOWANCE POLICY

**KEY DECISION:** NO

**REASON:** The value of this decision is less than £500,000 and this decision will not have a significant effect on communities living in two or more wards.

### **BACKGROUND:**

The Home to School Transport team undertakes the statutory function of Home to School Transport (HTST) services. There are a number of transport provisions available for parent/carers to access (ranging from travel budgets, public transport passes and contracted services).

As part of the IMPOWER consultancy works, the travel budget offer has been identified as an area that can generate some savings, along with providing future mitigation against contracted services for future students, with additional parents/carers looking to join the scheme.

There are currently 35 active travel budget contracts (estimated at £250k for the financial year 2024/25) which we aim to increase through the revised policy and publicising the scheme on our website and through the applications process.

We will also align the current cohort to the new policy and calculation method, ensuring that the provision covers parental cost, but ensuring that no over imbursement (profit) could be made by the parents which goes against the intentions of the scheme.

However, no changes to their calculated values will be made until September 2025 (other than adjusting excessive values to the previous calculation method). This provides parent/carers over 12 months to review the revised offer, and if they are not able to continue, it provides opportunity for travel training and other options to be investigated and implemented as appropriate.

The current cohort of families on travel budgets will be advised of the changes and be required to adapt the new policy for renewal of their travel allowances in September 2024.

### **DECISION:**

To implement the personal travel allowance for all new students and parent/carers joining the scheme for the 2024/25 financial year and beyond, including the calculation method that allows North Somerset Council to identify the parent costs and a top-up intended to cover any oncosts and allow flexibility for fluctuations in fuel prices.

### **REASONS:**

The existing calculation is very generous when compared to other authorities, the new approach of meeting parent costs will standardise the approach and means that the scheme can be reviewed for a larger number of students (and not offered as a last resort). Offers for a travel allowance will be made where it is cost effective for the authority or the existing transport provision does not meet the needs of the student. A policy will be shared and published on our website (this currently is not the case) and the travel allowance will be more visible through the application process as a possible transport provision that could be offered.

Aligning the current cohort with the new calculation method in September 2025 gives suitable time for parent/carers to consider new values and for any additional support that can be given to be provided (such as travel training) in readiness for September 2025 – this means that there is suitable time to work with families rather than pushing this through for September 2024 without consideration to the impact to families and crucially the young person.

### **OPTIONS CONSIDERED:**

**Option A** – Adopt the new policy, go live from 01 April 2024 for families joining the scheme, contact the current cohort to advise of new values from September 2025, a new policy from April 2024 (they will join this from September 2024) and work with families unable to continue the scheme to support their young person's access appropriate alternative transport opportunities.

Cost Mitigation achieved during Financial Year 2024/25 and cost reduction of current PTB's realised in September 2025 during the 2025/26 financial year.

This option will allow for officers to work with parents to identify full home to school transport costs (whether this the actual cost of driving, or facilitating another option suggested through the policy) and calculate a fair value that is unique to the each parent/carers situation. This will ensure that costs continued to be covered and removes any questions over profit being made from the scheme.

As per the policy, allowances will be reviewed each year and recalculated accordingly. With the option of 10% for oncosts, this provides cover for fluctuations in fuel prices (or other items) throughout the year and ensures values remain lower than the current travel budget policy provides (oncosts wouldn't be applicable if the allowance was being used to purchase a fixed price ticket).

**Option B** – Adopt the new policy and a calculation methodology based on 45 pence per mile for 2 journeys (where the student is in the car). This option in recent scenarios within the Home to School Transport team does not fully cover parent costs for all 4 journey's that they will be undertaking. Where 2 journeys does cover the parent costs, the Home to School Transport team are frequently challenged as parents believe the rate of reimbursement is too low due to it stating only covering the 2 journeys.

This option does not allow flexibility for the scheme to consider other methods of transport as the calculation is at a fixed rate and assumes driving – this is not suitable for a policy that suggests multiple options for how the allowance could be used to facilitate Home to School Transport.

**Option C** – Adopt the new policy and a calculation methodology based on 45 pence per mile for 4 journeys (home to school return in the AM and again in the PM).

This option reimburses parents at a much higher rate than their cost expenditure. The purpose of the Personal Travel Allowance is not to allow parents to make a profit on the transport provision that they are operating, but to ensure that their costs are covered, meaning the provision remains free (at no cost).

This option covers parent costs and some additional for oncosts but does not provide the flexibility for arrangements that don't involve driving a car, such as a rail pass. The annual reimbursement for parents would be £1,710, but this would not be sufficient for families looking at alternative measures such as a rail pass for both parent/student and provides no flexibility for increasing the value of the reimbursement above this whilst remaining below contracted services.

This option does not allow flexibility for the scheme to consider other methods of transport as the calculation is at a fixed rate and assumes driving – this is not suitable for a policy that suggests multiple options for how the allowance could be used to facilitate Home to School Transport.

**Option D** – Do nothing, continue to incur high spend on travel budgets, no published policy and a scheme that isn't documented on our website.

## **FINANCIAL IMPLICATIONS:**

### **Costs**

A saving of between £75,000-£150,000 can be achieved from September 2025 when adjusting the current cohort travel allowances in line with the new calculation method. There is a risk that families will not accept the reduced values and alternative transport provisions will need to be found (likely at a greater cost), however, this allows for North Somerset to support the families through other projects such as the travel training.

A cost mitigation for new students joining the scheme will be tracked as these costs will be at a price lower than the alternative transport provision (contracted) that would have to be implemented.

The calculation tool for identifying parent/carer costs has been created and allows for flexibility between driving and/or other methods of using Personal Travel Allowance to assist officers with identify a suitable value that meets the parents costs, but doesn't allow for additional funds to be received as profit.

The contracts will be reviewed on an annual basis in readiness for each academic year and will be reviewed mid-year should there be a change in circumstance (house move or school change) to ensure that the value remains accurate for costs incurred (and that transport entitlement remains in a circumstance change).

**Funding**

These costs will be funded through the HTST budget and the policy changes are part of the £650k MTFP savings expected of HTST during the 2024/25 financial year in areas relating to the IMPOWER consultancy works.

**LEGAL POWERS AND IMPLICATIONS**

These are statutory services and the personal travel allowance will support the Home to School Transport Team with delivering these obligations.

**CLIMATE CHANGE AND ENVIRONMENTAL IMPLICATIONS**

N/A

**CONSULTATION**

N/A

**RISK MANAGEMENT**

There is a risk of some families not agreeing to the reduced values, however this will be offset through cost mitigation of new students joining the scheme and further mitigated through travel training.

**EQUALITY IMPLICATIONS**

Have you undertaken an Equality Impact Assessment? Yes – no high or medium impacts identified.

**CORPORATE IMPLICATIONS**

None, HTST service functions as normal and delivers statutory transport services through a range of transport provisions.

**APPENDICES**

Personal Allowance Travel Policy 2024.  
Personal Travel Allowance Calculation.

**BACKGROUND PAPERS**

Not applicable.


SIGNATORIES:

**DECISION MAKER(S):**

Signed:  Executive Member for Highways and Transport

Date: 18 April 2024

**IN CONSULTATION WITH:**

Signed:  Executive Member for Childrens Services, Families and Lifelong Learning.

Date: 18 April 2024

**WITH ADVICE FROM:**

Signed:  Director of Place

Date: 18 April 2024

# Home to School Travel and Transport Personal Travel Allowance Policy

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Last updated by Georgina on 20 February 2024



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## 1. Introduction

This is a supplementary policy to enhance the information available in the statutory policies available on the [North Somerset Council Website](#). The personal travel allowance is only offered to those students eligible for Home to School Travel.

*You cannot receive a Personal Travel Allowance if your child is not eligible for free home to school travel assistance.*

*The Personal Travel Allowance supersedes the previous Personal Travel Budget scheme.*

## 2. What is a Personal Travel Allowance?

A Personal Travel Allowance (PTA) is a sum of money paid to parent or carers of children and young people who qualify for school travel assistance. This is offered as an alternative to a contracted service and is at the council's discretion.

The travel allowance offers an agreed sum which is paid during the academic year (September - July) that the pupil attends their school placement. This will be reviewed periodically and each summer if the allowance were continue into the following academic year. PTA contracts are only valid for the stated academic year at the point of entering the agreement.

A PTA gives flexibility to families that would like the freedom to choose how their child travels to school. It can be used for the following examples (list not exhaustive):

- Financially support car sharing opportunities identified by schools and the local community.
- Purchasing travel passes for public transport services.
- Financially support any adaptations to or owning a vehicle.
- To pay for fuel/running costs on a vehicle that is used to provide school transport.
- Supporting another person (carer/ friend/ family member) to provide transport.
- Covering the cost of childcare for other siblings to allow the parent/carer to take the eligible student to their educational setting.

PTAs are tailored to meet the specific needs of each family, considering their unique circumstances. It is designed to ensure that any transport costs are covered without any cost to yourself, guaranteeing access your child's educational setting is free.

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### 3. PTA Benefits

If a parent selects a PTA as a transport option for their child, some potential advantages may include:

- Your child is more relaxed due to your child being with someone familiar.
- Management of the journey. reducing stress and alleviating pressure.
- Maintaining day to day contact with school and care givers/ teachers.

PTA's provide parents and carers with the opportunity to select transport options that best meet their child's needs. By allowing families to have control over how allocated funds are spent, PTAs aim to create a more manageable and predictable school commute for both parents and children, ultimately reducing stress and anxiety. In addition, this flexibility enables children to access a wider range of services, such as after-school clubs and activities.

### 4. Conditions of use

Personal Transport Allowances cannot be used in the following circumstances:

- To access or utilise space on transport services already offered through Home to School Transport (for example the Vacant Seat Payment Scheme).
- For any purpose that does not enable the pupil to travel to/from the school/education setting, e.g. medical appointments.
- To travel to activities other than the education setting, for example work experience.
- For any activity that is illegal, unlawful, or unsafe.
- For other purposes that may bring the Council into disrepute.

Anyone found to be mis-using their PTA will have the offer withdrawn with immediate effect and monies reclaimed where applicable.

*If your child attends a mainstream educational setting and is eligible for free home to school travel assistance, a PTA may be provided if no other transport options are available. This arrangement must be agreed upon mutually by both the Local Authority and you.*



## 5. PTA Calculations and Payment Schedule

PTAs are assessed on a case-by-case basis considering individual circumstances. This ensures fairness across all those accessing the scheme (and those interested in the scheme) and that your travel costs will be reimbursed to ensure there is no cost to you for providing this service. Equally it ensures that a profit is not able to be made from the scheme.

PTA is not tax deductible and does not need to be declared as income.

### 5.1 How is it calculated?

During the application process we will discuss with you how you intend to use the PTA, review the costs that you incur transporting your child to their education setting and a value will be calculated following this. The PTA is not designed to match or cover contracted costs of an alternative service.

The Local Authority retain the right to increase and/ or decrease this value to meet any change in your individual circumstances.

### 5.2 Payment Schedule

Once the annual PTA has been agreed, this will be paid in 6 equal termly payments, in readiness for the upcoming term.

*An exception to this is if the parent/ carer needs to purchase a seasonal rail pass or coach pass where the full annual amount will be paid, with no further termly payments being made.*

Deductions might be made to your PTA; we work closely with schools to ensure that PTA scheme does not impact your student’s attendance at school. Deductions are made in-line with attendance (i.e. 1 day missed will result in 1 day payment reduction next term).

See below how deductions and payments are made -

School Term	Deduction based on
<b>1</b> (Sep-Oct)	<b>Term 5</b> (Apr -Jun) attendance
<b>2</b> (Nov-Dec)	<b>Term 6</b> (Jun – Jul) attendance
<b>3</b> (Jan-Feb)	<b>Term 1</b> (Sep – Oct) attendance

4 (Feb-Mar)	<b>Term 2</b> (Nov – Dec) attendance
5 (Apr-Jun)	<b>Term 3</b> (Jan-Feb) attendance
6 (Jun-Jul)	<b>Term 4</b> (Feb- Mar) attendance

New children to the scheme will have the deductions made after at least two terms have passed since joining the scheme. For example, if you start the scheme in September, we will not use Term 5 or 6 attendance to make any deductions. Terms 1 and 2 will be paid at full value, and then Term 3 will be reduced in-line with any attendance in Term 1.

### 5.3 Repayment Requests

If you do not attend your educational setting for a pro-longed period, we may freeze your next payment rather than making a reduction. This allows the previous payment to be fully used before a further payment is made.

The Local Authority has the right to reclaim monies not being used for its intended purposes as a last resort.

## 6. Termination of PTA

In some circumstances there may be a time where the local authority or the parent may want to end the PTA agreement. Below outlines the steps that will be taken.

### 6.1 Parent PTA Contract Termination

If you find yourself in a position where you are not longer able to provide transport for you child. The local authority will work with you to identify other opportunities that may exist with your travel allowance.

Should this not be achievable, you have the right to end the agreement if the council can provide alternative travel arrangements, which meet the child’s needs and remains within government spending constraints.

Parent/ carers **must** provide twenty working days’ notice in writing to the Home to School transport inbox, confirming child’s name and educational setting.

### 6.2 Local Authority PTA Contract Termination

The Local Authority will look to terminate the PTA contract in the following situations –

- The child is not attending their educational setting or attendance is very low.

- There is a more cost-effective transport provision available, that meets your child needs.
- Payment exceeds the parental cost for providing transport.
- If no notification has been made due to a change in circumstance (For example change of address or school).

Twenty working day notice will be given to parents of the termination. This gives the local authority sufficient time to source a suitable transport provision.

If you leave the PTA agreement and wish to rejoin at a later date, the value of the allowance will be recalculated, and the value may differ to previously agreed values. It may not be possible to return to the scheme at your previous rate.

## 7. Application Process

If your child is new to the Home to School Transport service. We require you to complete an [online](#) application form and follow the instructions.

In this application you **must** do the following –

- State that you are interested in the PTA scheme.
- Select the PTA scheme option on the relevant application webpage.

If you have travel assistance eligibility, we will be in touch with details on the PTA scheme due to your unique circumstances.

The application will be assessed by a Transport Officer to determine eligibility and travel provision and upon receipt of the application form, the Home to School Transport Team will process the application within twenty working days.

Once an offer of a PTA has been offered after a successful application, the first payment will be pro-rated for the applicable term and the full payment (assuming no deductions) will be paid in readiness for the start of the next full term.

*If your child attends a mainstream educational setting and is eligible for free home to school travel assistance, a PTA may be provided if no other transport options are available. This arrangement must be agreed upon mutually by both the Local Authority and you.*

If your child already uses Home to School Transport you **must** do the following -

- Email [schooltransport@n-somerset.gov.uk](mailto:schooltransport@n-somerset.gov.uk) stating your student's name, school, and current transport provision.

We will share these details with the allocated Transport Officer for your child's school and they will be in touch with any PTA offer than we can make (please note, that the offer of a PTA is at the council's discretion and not a guarantee). The officer will aim to be in contact within twenty working days of the receipt of your email with an outcome of your request.

Any offer will take place from the start of the next term as determined on the [councils website](#).

## 8. Payment Queries

You will receive a remittance statement before a payment is due advising you of the amount paid for that term. Parents **must** confirm within ten working days, in writing, to highlight any discrepancies on this statement. Failure to inform the Home to school transport team may mean that it is not possible to correct this payment at later date.

## 9. Appeals and Complaints

You are unable to appeal the refusal decision of a PTA offer as a PTA is only available for those eligible for Home to School transport. Your eligibility is not at risk; however, you are able to have your decision reviewed by following our complaint procedure.

We aim to reply within ten working days. You will be told when a reply will take more than ten working days and given a date to expect a reply.

To register a complaint please do this via the [North Somerset Council Website](#).