

FACT SHEETS ON HOME TO SCHOOL TRANSPORT
JULY 2011

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What is the legal entitlement?

The legal entitlement is for free transport and is based upon:

- Distance and/or
- Special Circumstances
 - Special Needs or Disability
 - Low income
 - Safety of walking route

There is no direct entitlement linked to:

- Catchment
- Religion
- Type of School [Grammar/Upper, male/female]

Category	Statutory Entitlement
Pupils up to the age of 8 (year 3)	Free transport to the nearest qualifying school ¹ if it is more than 2 miles walking distance from home.
Pupils between the ages of 8 and 16 (years 4 to 11)	Free transport to the nearest qualifying school if it is more than 3 miles walking distance from home.
Pupils from low income ² families aged between 8 and 11 (years 4 to 6)	Free transport to the nearest qualifying school if it is more than 2 miles walking distance from home.
Pupils from low income families aged between 11 and 16 (years 7 to 11)	Free transport to one of the three nearest qualifying schools if it is between 2 and 6 miles away. Or the nearest school preferred by reason of a parent/carer's religion or belief that is more than 2 miles by the shortest available walking route and not more than 15 miles away.
Pupils with Special Educational Needs or disability or mobility problems	Free transport to the nearest qualifying school, where the pupil lives within the statutory walking distance from school and where due to their special needs or disability they are unable to walk in reasonable safety even when accompanied.
Pupils living within the statutory walking distance but who are unable to walk in safety to school because of the nature of the route	Free transport to the nearest qualifying school, where the pupil lives within the statutory walking distance from school and where, due to the nature of the route, they are unable to walk in reasonable safety even when accompanied.

¹ The phrase “qualifying school” is defined as meaning, *inter alia*, “a community, foundation or voluntary school... or an Academy” (see paragraph 15(2) of Schedule 35B to the 1996 Act). So far as we are aware, therefore, all grammar schools and upper schools within Buckinghamshire would fall within the definition of a “qualifying school”.

² Entitled to free school meals or whose family is in receipt of maximum working tax credit.

What savings have been made so far?

In 2007/8, the year before the Amey contract began the home to school transport budget exceeded £18m and was rising significantly. The new contract began in June 2008 and its first significant impact was in the following 2009/10 financial year

In the recent years the expenditure has been as follows:

Financial Year	Spend	Anticipated spend using benchmark of 2007/8 and continued RPI inflation	Saving
2007/8	18.2m		
2008/9	19.0m	18.9m	-0.1m
2009/10	18.1m	19.1m	1.0 m
2010/11	17.7m	19.5m	1.8 m
TOTAL SAVED			2.7 m

These savings have been made by a combination of changes to:

Procurement: efficiency savings achieved by Amey

Practice: more economic application of the policy rules

Policy: minimal changes of entitlement prior to 2011

Amey Client Transport continue to manage the supply chain and transport network robustly to maintain these efficiencies. In order to achieve further significant savings policy changes are therefore required.

At this point the scope for additional major savings requires further examination of the entitlement policy.

What savings are required and how has this been estimated?

The target is to save £1.4m per annum

It was envisaged this would be phased as follows:

	ACADEMIC YEAR						TOTAL
YEAR	0	1	2	3	4	5	
ORIGINAL PLAN	£280,000	£560,000	£840,000	£1,120,000	£1,400,000	£1,400,000	£5,600,000
REVISED PLAN?	£ -	£840,000	£840,000	£1,120,000	£1,400,000	£1,400,000	£5,600,000
	FINANCIAL YEAR						TOTAL
YEAR	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	
ORIGINAL PLAN	£186,667	£466,667	£746,667	£1,026,667	£1,306,667	£1,400,000	£5,133,333
REVISED PLAN?	£ -	£560,000	£840,000	£1,026,667	£1,306,667	£1,400,000	£5,133,333

The calculation is based upon the following figures:

But

- These numbers are based upon straight line distances [for simplicity] and detailed travel distances will reduce the numbers
- It does not take into account schools being full and a place at a further school having to be offered
- £600 is a conservative estimate of average cost and a distance-banded fare structure to achieve this means that many pay much more³

GRAMMAR⁴ TRANSPORT with average cost of £600 per pupil	Statutory age pupils	% eligible	SAVING per academic year
TOTAL PUPILS	15061		
CATCHMENT GRAMMAR OF CHOICE: currently entitled to free/subsidised transport	4553	30%	
Total Cost	£2,731,800		£0
NEAREST CATCHMENT GRAMMAR: Only grammars are counted as nearest appropriate	2152	14%	
Total Cost	£1,291,200		£1,440,600
NEAREST GRAMMAR: Only grammars are counted as nearest appropriate	1947	13%	
Total Cost	£1,168,200		£1,563,600
NEAREST SECONDARY SCHOOL: Uppers and grammars can be nearest appropriate	173	1%	
Total Cost	£103,800		£2,628,000

³ See fact sheet on charges

⁴ The same issue applies to upper and primary schools but to a very small extent compared to the grammar case

Options for Savings that do not change entitlement

- **Pick up points reduced**
- **Central drop off points**
 - Statutory Guidance says

55. Whilst the duty to make travel arrangements does not necessarily imply a door to door service, arrangements that anticipated a child being expected to walk an unreasonably long distance to catch a public service bus, or a bus journey that ended an unreasonably long distance from the relevant school are unlikely to be suitable. Again, the maximum distances will depend on a range of circumstances, including the age of the child, their individual needs and the nature of the routes they are expected to walk to the pick up or set down points.

Modeling from Amey suggests that very little could be saved from mainstream by having fewer stops on the same length route, but altering pick up points to make it a shorter route could bring savings. But changing pick up points to reduce the length of the route could produce savings. Also c. £50,000 p.a. from special educational needs from the point of contracts being re-procured i.e. from September 2012.

- **Community action/ Payments to parents**

If, say, 20% of 'mainstream' parents between 3 and 6 miles took up a parent travel allowance of £300 per annum, the Council could save £300 per annum given that average cost is £600.

Parent Payments Modeled⁵

861 pupils in the September 2011 intake cohort live between 3 and 6 miles and will attend a catchment school. If you multiply this by five, to take account for older year groups, the number would be **4305**. These figures are for Grammars and Uppers together.

In terms of savings, $20\% \times 861 \times £300 = \mathbf{£51,660}$ for one year group. $20\% \times 4305 \times £300 = \mathbf{£258,300}$ for all year groups.

⁵ Estimates are not an official record of who is currently entitled. It simply counts those that attend a catchment school and live within the distance boundaries specified. It does not take into account pupils that receive free transport due to low income or because their catchment school was full and were offered elsewhere. All figures are for statutory age pupils only. Both of the schemes above assume that if a bus place is freed up then the cost of that bus place will be saved or replaced by an identical discretionary fare. Amey add: However, there is only a guarantee of some saving if the final choice of those 'volunteering' to take such an allowance is managed by Amey Client Transport in relation to any vehicles hired. In some cases, unregulated access to this allowance would simply be an additional cost, because the relevant bus seat could not be 'stripped out'.

- **Bikes** [see also note 5]
 - If 20% of pupils between 3 and 4 miles took up a cycle allowance of £300 per annum, the Council would save £300 per annum given that average cost is £600.

Bikes

330 pupils in the September 2011 intake cohort live between 3 and 4 miles and will attend a catchment school. If you multiply this by five, to take account for older year groups, the number would be **1650**. These figures are for Grammars and Uppers together.

In terms of savings, $20\% \times 330 \times £300 = \text{£19,800 for one year group}$. $20\% \times 1650 \times £300 = \text{£99,000 for all year groups}$.

- **School opening / closing times**
 - Aligning the times of the start and end of the school day (especially secondary schools) could produce a substantial saving, however this has not yet been modelled.
- **Advertising on buses**
 - Not our buses
- **Administration charge to all**
 - Not legal
- **Unsafe walking routes made safe**
 - This needs to be assessed in more detail
- **Eliminate places booked but not used**
- **Other ideas [from July 21st Meetings]**
 - Taxi to the bus stop rather than taxi all the way to school in instances where taxi transport necessary and pupil able to use bus
 - Subsidised public bus passes

Options for Savings that do change entitlement

- **Nearest catchment school**

There is no mention of catchments in the legislation. But presently the link to catchments in Buckinghamshire has arisen because of some historic admissions issues. When responding to the 2005 legislation changes, the Local Authority negotiated catchment areas to deliver the principle of 'local schools for local children', and, to make school capacities work well, shared catchment areas were created. The impact meant the nearest school was not necessarily the catchment school although where this was the case in some areas we resolved it, e.g. Great Missenden now in catchment for RGS. However some anomalies still exist e.g. the closest school to Gerrards Cross and Denham is BGS but there are no clear transport and community links to Burnham from the Gerrards Cross and Denham area, and so parents have tended not to choose BGS. However, the transport entitlement legislation is not designed to deal with admissions issues.

Now that Academies will be able to determine their own catchment areas, the current rule of "transport to any catchment grammar" will not be sustainable e.g. An Aylesbury school could decide that Wycombe was in its catchment area and the Council would then, under the present policy, be required to transport pupils from Wycombe to Aylesbury.

This saves approx £1.4m per annum with an estimated 25% margin of error.

- **Nearest school**

The argument against this is that only the nearest grammar or nearest upper is suitable, "an appropriate school", according to 11+ results. But as Upper schools become Academies they will become all ability schools, as is for example already the case in Aylesbury. So this argument will no longer be sustainable. Our legal advice is in fact that it is NOT a requirement now.

This saves approx £2.6m per annum but with a higher than 25% margin of error⁶ i.e. an additional £1.2m

- **Rising 5**

Eliminate current "rising 5" entitlement. This is beyond statute but not significant in scale.

⁶ Detailed work has not been carried out, but the limits of the preliminary modelling are pointed out on page 4:

- These numbers are based upon straight line distances [for simplicity] and detailed travel distances will reduce the numbers
- It does not take into account schools being full and a place at a further school having to be offered

Issues about charges

Charges made in recent years rely on four principles:

- Distance Banding
- Average County-wide charges
- Age banding up to 16 and post 16
- Non-profit making for Buckinghamshire pupils

The possibility of changing this has been considered, and issues are:

- How to deal with big changes upwards?
- Whether this will lead to a loss of revenue?

Gainers would be:

- Post 16 if a flat charge by age
- Rural more distant residents, if fewer bands, or one rate

But vice versa there would be losers too.

Amey are unable to quote a charge per route as the routes are tendered in groups and the contractor is not required to give a price per route, but rather a price for a group of routes.

The fares 2011/12

Mileage	Band	Annual Cost	Per Journey
<i>Up to 2</i>	1a	£289.75	£0.76
	1b	£392.35	£1.03
<i>2 to 2.99</i>	2a	£383.80	£1.01
	2b	£517.75	£1.36
<i>3 to 3.99</i>	3a	£470.25	£1.24
	3b	£633.65	£1.67
<i>4 to 4.99</i>	4a	£551.95	£1.45
	4b	£744.80	£1.96
<i>5 to 6.99</i>	5a	£619.40	£1.63
	5b	£836.00	£2.20
<i>7 to 9.99</i>	6a	£700.15	£1.84
	6b	£945.25	£2.49
<i>10 to 14.99</i>	7a	£763.80	£2.01
	7b	£1,030.75	£2.71
<i>15 to 19.99</i>	8a	£828.40	£2.18
	8b	£1,118.15	£2.94

Benchmarking example for comparison: Hertfordshire

	2011/12	2012/13	2013/14
Under 3	£ 426	£ 588	£ 750
3-4.99	£ 588	£ 794	£ 1,000
5 or more	£ 744	£ 947	£ 1,150

Suggested principles for change

A strong message from the June 2011 public meetings has been that any charges should be spread across as many people as possible so as to minimise the burden on individual families. The notion of the charges being levied from a relatively few number of families is perceived as unfair and unreasonable. Retrospective changes are also seen as unfair because parents take the view that they have made their admissions choices on the premise of a particular configuration of transport eligibility.

In order to address these points the following principles are required:-

1. Proposals must be legal.

This immediately eliminates the suggestion that everyone pays something as most pupils on school transport have a free entitlement by law.

2. Any future admissions materials must make the transport eligibility clear and must stress that transport eligibility could change in the 8 years between a year 6 pupil making their choice and leaving school or college at the end of year 13.

The Council cannot promise to keep the transport eligibility policy the same for 8 years because: a) national legislation might change and b) any particular group of members is only elected for 4 years.

3. The principle of spreading the load across a maximum number implies that all those who currently have an entitlement that exceeds statute should pay something.

There are 2 interpretations of the "maximum number":

a) all those who do not attend either their physically nearest school or their nearest catchment school

b) all those who do not attend their physically nearest school.

4. Minimising costs

Another way of lowering the charge per family is to introduce a range of other ideas that would reduce travel costs. None of these in themselves are likely to save a large sum but there could be a significant cumulative effect. However, this does need to be tested.

5. Transparency

It is important that the policy lends itself to clear and simple explanations of the Council's position, despite some of the complexities of the legislation. The current policy is more complex than the base legislation so this sometimes militates against transparency.

Spreading the cost

The cost can be spread in three ways:

- Making other savings so there is less cost to spread
- Spreading the cost over time [phasing]
- Spreading the cost over a greater number of people

Or

A combination of these

Phasing affecting one year group at a time takes 5 years to cover years 7-11

YEAR	GROUPS AFFECTED	% of saving made
1	Yr 7 pay full cost	20%
2	Yrs 7,8 pay full cost	40%
3	Yrs 7,8,9 pay full cost	60%
4	Yrs 7,8,9,10 pay full cost	80%
5	Yrs 7,8,9,10,11 pay full cost	100%

Spreading affecting all years groups progressively

YEAR	GROUPS AFFECTED	% of saving made
1	Yrs 7,8,9,10,11 pay 20% cost	20%
2	Yrs 7,8,9,10,11 pay 40% cost	40%
3	Yrs 7,8,9,10,11 pay 60% cost	60%
4	Yrs 7,8,9,10,11 pay 80% cost	80%
5	Yrs 7,8,9,10,11 pay 100% cost	100%

GRAMMAR TRANSPORT with average cost of £600 per pupil	Statutory age pupils	MAXIMUM Pupils who would in future pay	cost per pupil to raise £1.4m saving
TOTAL PUPILS	15061		
CATCHMENT GRAMMAR OF CHOICE: currently entitled to free/subsidised transport	4553		
Total Cost	£2,731,800		
NEAREST CATCHMENT GRAMMAR: Only grammars are counted as nearest appropriate	2152	2401	
Total Cost	£1,291,200		£583
NEAREST GRAMMAR: Only grammars are counted as nearest appropriate	1947	2606	
Total Cost	£1,168,200		£537
NEAREST SECONDARY SCHOOL: Uppers and grammars can be nearest appropriate	173	4380	
Total Cost	£103,800		£320
		LIKELY NUMBER	
NEAREST CATCHMENT GRAMMAR: Only grammars are counted as nearest appropriate	2152	2000	
Total Cost	£1,291,200		£700
NEAREST SECONDARY SCHOOL: Uppers and grammars can be nearest appropriate	173	3000	
Total Cost	£103,800		£467

