

Agenda Item 14

Equitable Access to Funded Transport



Falkirk Integration Joint Board

19 March 2021

Equitable Access to Funded Transport

For Decision

1. Executive Summary

- 1.1 The report sets out Falkirk HSCP policy on funded transport for service users to access social care services, associated guidance and supporting documentation. It does not relate to transport to NHS services.
- 1.2 The policy seeks to establish an equitable approach for the provision of supported transport, taking into account other funded transport options and individual circumstances.
- 1.3 The availability of suitable transport for individuals to attend a social work funded service is an essential component in ensuring that those individuals are able to access services which have been assessed as meeting their needs. Where individuals are in receipt of funding to assist with transport or alternative funded transport options are available, these will be taken into account in determining whether supported transport is to be provided to individual service users.

2. Recommendations

The Integration Joint Board is asked to:

- 2.1 agree the Policy as detailed in the accompanying report and appendices.

3. Background

- 3.1 In 2018 policy and guidance in relation to supported transport was reviewed in order to provide Falkirk HSCP with a policy which was in accordance with relevant legislation, best practice and financial requirements. It appears that, prior to this, the approach to supported transport was based on custom and practice.
- 3.2 Following the review a number of statements or principles were drawn up to inform policy development and consultation was undertaken with service users and carers. The consultation involved over 180 service users and carers and evidenced broad support for the approach being proposed.
- 3.3 A draft of the policy was circulated to HSCP Team Managers in 2018, however due to staffing changes the policy was not brought to the IJB for formal consideration.

- 3.4 In the absence of a formal policy, HSCP team managers have been working to the draft proposals. These have been found to operate effectively and no complaints have been recorded relating to eligibility for supported transport. However in order to ensure transparency and compliance with oversight requirements, the draft policy is being brought to the IJB for consideration. In addition a checklist has been created to assist assessors in ensuring that the circumstances of individual service users are considered on a person-centred basis.

4. Social Work Adult Services Funded Transport Policy

- 4.1 Provision of supported transport is recognised as an essential component in ensuring individuals who have been assessed as meeting the criteria for a social work service can access those services on an equitable basis.
- 4.2 It was recognised that some service users who were entitled to funding to assist with their transport needs, such as Personal Independence Payments (PIP) were not claiming for these benefits or utilising them for their intended purpose.
- 4.3 It was also recognised that, in line with other policies adopted by the Partnership, our transport policy should support and encourage the maintenance and development of independent living skills for individual service users.
- 4.4 In order to fulfil these, sometimes conflicting, objectives, the policy document was created and is attached at appendix 1. The checklist, Appendix 2, which is a recent addition will, if adopted, ensure that a proactive approach is taken to maximising the entitlement of individuals to funding, establish whether there is funding already in place or alternative transport options available and encourage the development of independent travel skills, where appropriate. The Board is asked to agree the policy.
- 4.5 However, recognising the complexity of individual circumstances, the policy provides for discretion to be exercised by the relevant Locality Manager, or equivalent, should exceptional circumstance apply.
- 4.6 Similar policy and guidance arrangements are in place for other HSCPs. A review of implementation will be undertaken in 6 months (September 2021).

5. Conclusions

- 5.1 Current practice, across the Partnership, has evolved to support a fair and equitable approach to funding transport for individuals who are unable to travel on their own or lack the funds to pay for the transport required. The attached, draft, policy sets out what the Partnership believes to be a fair and equitable approach. This report invites the IJB to adopt the draft as the policy

of the Partnership and provides guidance, in the form of a checklist, to support implementation.

Resource Implications

It is not considered that there be any direct financial implications arising out of the recommendations as they reflect and consolidate current practice.

Impact on IJB Outcomes and Priorities

The implementation of an equitable transport policy will ensure that individuals who meet the criteria for a social work funded service will be supported to access that service and maximise their entitlement to other benefits to which they are entitled.

Directions

No new Direction or amendment is required.

Legal & Risk Implications

No new legal issues or risks should arise.

Consultation

The proposed approach was consulted upon in 2017/18. The recommendation is to adopt the attached policy which is consistent with the proposals which were consulted upon.

Equalities Assessment

An Equalities Assessment was undertaken following the consultation and no impediment to adopting the policy was identified.

6. Report Author

Gordon Mackenzie, Locality Manager (East)

7. List of Background Papers

- 7.1 Falkirk HSCP Transport Policy (draft) 2018

8. Appendices

Appendix 1: Falkirk HSCP Funded Transport Policy 2021 (draft)

Appendix 2: Equitable Access to Transport Checklist (draft)



Falkirk
Health and Social Care
Partnership

**SOCIAL WORK ADULT SERVICES
FUNDED TRANSPORT POLICY**

JANUARY 2021

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1. POLICY CONTEXT

This policy operates within the context of eligible support provision offered through Social Work Adult Services.

Under Section 12A-(1) of the Social Work (Scotland) Act 1968, Local Authorities have a duty to assess any adult who appears to need community care services. Local Authorities are encouraged to set a low threshold for access to assessment of need and as such Falkirk Council provides assessment of need to people at all levels of priority.

Falkirk Council is part of the Falkirk Health and Social Care Partnership (Falkirk HSCP). The purpose of care and support provision provided by Falkirk HSCP is to support people to remain as independent and as well as they can be in their local communities for as long as possible.

This Social Work Adult Services Transport Policy has been developed in this context.

The scope of the policy is adult service users. Adults are defined as people over the age of 18. Outside the scope of this policy are children and young people under the age of 18. These young people are all covered by the Falkirk Council Children's Services Transport Policy.

2. OVERARCHING PRINCIPLES

Local Authorities are encouraged to set a low threshold for access to assessment of need and as such Falkirk Council provides assessment of need to people at all levels of priority.

Falkirk Council is part of the Falkirk HSCP. The purpose of care and support provision provided by Falkirk HSCP is to support people to remain as independent and as well as they can be in their local communities for as long as possible.

2.1 The purpose of the policy will support service users and carers to:

- Be as independent as they can be;
- Have greater choice, control and dignity;
- Have a healthier lifestyle;
- Have an improved quality of life;
- Make greater use of locally accessible services;
- Ensure safe options are available;
- Provide support when necessary.

- 2.2** Transport, in itself, is not deemed to be a Social Work service. Therefore, careful consideration requires to be given to providing transport assistance. This should only happen, following an assessment of need and as part of a care plan, when the service user has no access to more appropriate means of transport (e.g. access to bus pass or public transport or Personal Independent Payment - PIP).

Social Work Adult Services operates within a defined allocated budget and is accountable for use of this budget, which includes spending the money we have in the most effective and efficient ways and ensuring the service does not incur unnecessary expenditure. This is particularly relevant when service users have access to other forms of transport which do not require to be supported from the “public purse”.

The Equitable Access to Funded Transport Checklist (please see Appendix 1) will:

- Ensure that any **assets and benefits** adults and older people receive to help with mobility are used to meet transport needs.
- Make it clear **who will be eligible** for funded transport further to completion of a transport checklist and the use of transport eligibility criteria as part of the social work assessment process.
- Make sure that any funded transport is provided **equitably** and in a **fair** and **transparent** way.

3. ASSESSING THE NEED FOR TRANSPORT

- 3.1** Where an individual is assessed as requiring a Social Work service, an assessment of their need for assistance with transport, in order to access the service, will also be undertaken. This will be undertaken as part of the overall assessment of need and resulting care plan. The transport checklist (Appendix 2) is part of this process and is intended to inform meaningful discussion with the individual and their family/relevant partners.

- 3.2** A service user will only receive assistance with transport from Social Work Adult Services in the following circumstances:-

- a) They are in receipt of, or have been assessed as eligible for, a service in accordance with the relevant eligibility criteria.

and

- b) The assessment has taken into account whether they are in receipt of state benefits (in case or kind) that are provided for the expressed purpose of aiding mobility. Where the service user is not in receipt of benefits, a benefits check will be undertaken to establish whether the service user is eligible for a Personal Independence Payment (PIP), including the mobility component.

and

- c) The assessment of need has demonstrated that assistance with transport is essential to enable the service user to access a service.

and

- d) It must be demonstrated that all other reasonable transport options have been explored and deemed unsuitable.

- 3.3** Each assessment for assistance with transport will take full account of the needs and circumstances of the service user. It will look in detail at all transport options for each individual journey.
- 3.4** An assessment or review of a service user's need for assistance with transport will normally be undertaken at the same time as any assessment or review of service, and at a minimum of 12 monthly intervals. Where there are significant changes to circumstances or where it has been previously agreed to do so, a review will take place earlier than this.
- 3.5** Where a service user is receiving the mobility allowance at the higher or enhanced rate or has access to a vehicle through the Motability Scheme, they will be considered to have no requirement for additional assistance with transport or associated costs.
- 3.6** Occasionally, exceptions to this may arise i.e. unusual and complicated circumstances impacting on a service user's ability to access services. In such cases Head of Service approval would be required for additional assistance with transport.

4. PROVISION OF TRANSPORT

- 4.1** This policy sets out the aim of Social Work Adult Services to provide adults, who are eligible, with transport which is safe, of high quality, responsive to changing circumstances and best value
- 4.2** Social Work Adult Services will provide assistance with the cost or the provision of transport where the service user is assessed as eligible.
- 4.3** Falkirk Council Transport Planning Unit (TPU) provide transport services on behalf of Social Work Adult Services and manages the transport contracts ensuring compliance with relevant legislation and guidance including the Protection of Vulnerable Groups (PVG).

5. SERVICE USER/CARER RESPONSIBILITIES

5.1 Service users and carers should:

Ensure the service user is ready at the agreed place and time of uplift.

Inform the service and allocated worker, if the service user will not be requiring the transport which has been planned.

Provide the transport planning unit with the name of an emergency contact..

Advise the transport assistant, driver or allocated worker, as appropriate, if the service user has a particular difficulty that day.

Where the service user's behaviour is causing concern or distress for other service users or staff, or resulting in significant delay to the journey, the driver will contact the transport team for advice. Efforts should be made to mitigate such behaviours but in circumstances which present significant health or safety concerns and /or recurring delays, transport may be withdrawn.

Service users are expected to:

5.2

- Take care when getting on or off vehicles
- Remain seated throughout the journey
- Wear a seatbelt
- Not interfere with emergency equipment or doors
- Not disturb the driver
- Comply with additional requirements as may be deemed necessary from time to time e.g. Covid -19

Gordon Mackenzie
Locality Manager (East)
January 2021

Equitable Access to Funded Transport Checklist

1. Is the person in receipt of benefits/monies which are provided for the express purpose of aiding mobility?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

2. Is there a requirement to make a referral to Citizens Advice for a review of benefits?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

3. Have mobility benefits been converted to lease a motability/mobility vehicle for the express use of aiding mobility?

☐ Yes

☐ No

If you answered 'yes' to question 3, please provide information about the vehicle.

a) How is the vehicle used to aid mobility, and for what purposes?

b) How often is the vehicle used?

c) Where is the vehicle parked?

d) Is it available at the time that the transport is required?

e) If the driver is a family member/friend and is unavailable to drive when the individual needs transport, is there an option for social work services to commission this?

4. Does the individual financially contribute to a shared vehicle?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

5. Does the individual have a concessionary travel card which may include a companion pass?

☐ Yes

☐ No

If you answered 'no' to question 5, is an application for a concessionary travel card required?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

6. Is there a risk to self or others if travelling independently?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

7. Could independent travel support be provided by family, friends, volunteers or a befriender?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

8. Could the individual travel independently if travel training/support was provided?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

9. Could the individual access transport provided by others e.g. family, friends, paid carer, support worker or a voluntary scheme?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

10. Is there a potential to share travel costs with others?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

11. What transport alternatives are available in the individual's local community and is it accessible?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

12. What barriers exist that prevent an individual travelling independently and could they be addressed?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

13. Is the individual accessing the nearest geographical service to meet their needs?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

14. Could the individual use Demand Responsive Transport which includes Ring & Ride/Dial-a-Ride which is free to use and provides accessible travel to those who find it difficult to access ordinary public transport?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

15. Are there carer support needs e.g. support to remain in employment, education or their leisure and/or volunteering activities?

☐ Yes

☐ No

If necessary, provide information in support of your answer.

Additional comments/exceptional circumstances

If necessary, provide additional information here.

-----End of Checklist-----