

BUS SERVICE OPERATORS GRANT



INFORMATION PACK and CONDITIONS OF ELIGIBILITY (PSV 450-S)

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AN EXPLANATION OF THE BUS SERVICE OPERATORS
GRANT SCHEME FOR COMMUNITY TRANSPORT OPERATORS
NOTES FOR GUIDANCE ON HOW TO COMPLETE FORM
PSV 452-S

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AN EXPLANATION OF THE BUS SERVICE OPERATORS GRANT SCHEME

Bus Service Operators Grant (BSOG) is a discretionary grant paid under section 38 of the Transport (Scotland) Act 2001 by Transport Scotland on behalf of Scottish Ministers. This grant is payable only on a local bus service as defined in section 2 of the Transport Act 1985 or a Community Transport service possessing a Section 19 Permit. The service(s) must then meet the further requirements detailed in the Bus Service Operators Grant (Scotland) Regulations 2002. This Information Pack only deals with Community Transport services. Details on how to claim BSOG for local bus services can be found in Information Pack **PSV 360-S**.

CONDITIONS OF ELIGIBILITY

An organisation wishing to receive BSOG first has to apply for acceptance onto the BSOG scheme. To enable eligibility to be checked they should complete form **PSV 455-S** and submit it to Transport Scotland. Along with form **PSV 455-S** they should submit a copy of the Section 19 Permit (or Permits if relevant) and such other documentation as is necessary to show the transport services provided in the eligible categories. Organisations should submit a copy of the Permit itself and not the Permit Disk. Documentation could, for example, include the body's constitution and/or its annual report and/or literature – an existing leaflet for example – describing the particular transport service for which BSOG will be claimed.

To qualify community transport services must be eligible services operated by non-profit making bodies on the basis of a Permit issued under Section 19 of the Transport Act 1985. Eligible services are services used wholly or mainly by:

- (a) persons who have attained the age of 60 years;
- (b) disabled persons*;
- (c) persons in receipt of income support under section 124 of the Social Security Contributions and Benefits Act 1992;
- (d) persons in receipt of jobseeker's allowance under the Jobseekers Act 1995;
- (dd) persons in receipt of employment and support allowance payable under Part 1 of the Welfare Reform Act 2007;
- (e) persons suffering a degree of social exclusion by virtue of unemployment, poverty or other economic factors, homelessness, geographical remoteness, ill health, or religious or cultural mores;
- (f) persons who believe that it would be unsafe for them to use any public passenger transport services; or
- (g) carers or persons under 16 years of age accompanying any of the foregoing.

This leaflet is for guidance only; full conditions of eligibility for BSOG are contained within the Bus Service Operators Grant (Scotland) Regulations 2002.

* 'disabled person' has the same meaning as in section 1 of the Disability Discrimination Act 1995. For this purpose, a person is disabled if he or she has a physical or mental impairment which has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities.

When completing form **PSV 455-S**, organisations should give a broad estimate of the proportion or percentage of persons carried, in terms of their overall business, for each category they are claiming for. If any of the categories an organisation is claiming for are not detailed in the literature they provide with their application, then they must confirm those details separately, i.e. rough numbers carried, to where and how often.

Transport Scotland will consider submitted applications and may seek external advice should this be necessary. Once satisfied that an organisation operates some services which qualify for the grant Transport Scotland will confirm acceptance onto the scheme in writing. Transport Scotland will also notify organisations if their application is unsuccessful based on the information that has been provided.

Further copies of **PSV 455-S**, this information pack and all other forms referred to above are available from Transport Scotland's Concessionary Travel and Integrated Ticketing Unit.

NOTES FOR GUIDANCE ON HOW TO COMPLETE FORM PSV 452-S

Once eligibility for the grant has been confirmed, Transport Scotland will issue form **PSV 452-S** which should be completed and returned to Transport Scotland.

Claimants for BSOG are required to maintain and keep accurate records to fully support the figures entered on form **PSV 452-S**. Services operated prior to the coming into force date of the BSOG regulations on 1 July 2002 will not be eligible. Eligibility can be backdated only to one financial year before the current financial year in question. The following gives guidance on the type of records that should be maintained.

SECTION 1: ELIGIBLE MILEAGE

Section 1 of form **PSV 452-S** is designed to record all mileage operated on eligible services. In order to be able to do this all vehicles used on those services must have a functioning mileage/kilometre measuring device (vehicles of course normally have an odometer fitted within the speedometer of the vehicle).

This will enable the claimant to record the opening and closing mileage/kilometre reading on each eligible journey or route made each day. In the case of a journey involving a mix of passengers where some are in the eligible categories and some are not, those journeys should not be included in the eligible mileage figure unless the wholly or mainly requirement is met (see section on conditions of eligibility). Resulting from this, accurate mileage/kilometre figures for each eligible journey or route can be calculated.

A record must exist in order to prove that the service operated. This is usually achieved by using driver or vehicle daily logsheets. Please note that the original records signed by the driver must be retained and available for at least 12 months after the claim form was submitted to Transport Scotland.

At the end of the claim period the actual mileage/kilometres for each eligible journey or route must be accumulated and transferred into Section 1 of the claim form. Only if the payment rate has changed during the period covered by this claim, separate figures of eligible kilometres are required in Section 1 for the periods in respect of which the different payment rates applied.

When the claim is processed, Transport Scotland will add a 1% allowance to the Section 1 figure to cover miscellaneous mileage incurred in connection with, for example, vehicle testing and maintenance and driver training. Where a vehicle has been used to make some journeys which are not eligible under the terms of the regulations, care must be taken not to include the mileage run within the total claimed. However, the claim may include 'dead' mileage which is that mileage integral to providing eligible services but is not in itself an eligible journey. This is mileage run in moving between two eligible journeys but not that in moving from an eligible journey to an ineligible one.

For example, dead mileage may include mileage at the start of the day from base to the first pick up, mileage at the end of the day from the last drop off to base and mileage either side of a driver break or handover. Dead mileage does not include mileage to and from any maintenance facility. This sort of mileage is covered by the 1% allowance.

Care must also be taken not to double claim mileage when a vehicle is lent or hired out to another organisation. The principle that will apply is that when the vehicle is hired out to another Community Transport group, it is for the group using the vehicle at the time to claim on the basis of their Section 19 Permit. Where the Community Transport group provides transport for the clients of a number of affiliated organisations under its own 'umbrella' Section 19 Permit, then the claim should come from the Community Transport group. It should be noted that, in such cases, some journeys may not be eligible, and these should be excluded from your claim for BSOG.

SECTION 2: FUEL CONSUMPTION CALCULATION

Section 2 of the claim form is used in order to obtain an accurate fuel consumption factor for those vehicle(s) that undertake any eligible journey. The resulting consumption rate is used to determine the grant due. Records must therefore be kept of both total kilometres run and total fuel issued.

The total vehicle kilometre figure must incorporate every turn of the wheel undertaken by your vehicle(s) regardless of the type of duty being performed. Assuming that there are no problems with the measuring equipment, it will be a simple matter of taking the mileage readings at the beginning of the claim period from that recorded at the end of the claim period for each of your vehicles. Generally, the total vehicle mileage/kilometre figure can be extracted from the driver or vehicle logsheets, but where this is not possible we recommend that regular mileage readings are recorded throughout the claim period. This should also ensure the integrity of the mileage/kilometre measuring equipment. Should you have more than one vehicle, simply add the vehicle totals together in order to obtain the claim figure.

The fuel figure should include the total amount of fuel actually issued to the vehicle(s) over exactly the same period from which total vehicle mileage has been derived. Details of fuel purchases will normally be available through the receipts issued from the point of sale. Calculation must not be based on a perceived consumption factor. Records must be maintained to show actual fuel issued.

The fuel and mileage for any vehicles that may come and go during the course of the claim period must also be included when compiling the Section 2 figure.

General

Organisations are paid BSOG in respect of eligible services operated in the preceding six months. Organisations would therefore make two claims in arrears each year, for example, claims will be made for the period April to September and October to March. However, where an organisation joins the scheme part-way through the six-month period then the first claim made may be for less than six months.

All records must be retained and available for at least 12 months after the claim form was submitted to Transport Scotland. All such records must be made available to the Scottish Ministers' authorised officers on request. Failure to maintain proper records or produce them when requested to do so may result in claimants being excluded from the scheme.

Conversion Factors

Transport Scotland uses the following conversion factors:

- a) miles to kilometres: Multiply by 1.61
- b) gallons to litres: Multiply by 4.55

Payment Rate

From 1 April 2010 the scheme will become budget limited. The payment rate will be determined by the amount of budget available. If this rate requires adjustment during the year Transport Scotland will make the necessary adjustments.

BSOG Rates from 1 April 2010 41.21 pence per litre

Audit Requirements

Where the total eligible kilometre figure in Section 1 of the claim form is less than 20,000 kilometres per claim, these claims can be 'self-certified' by a responsible officer of the body making the claim. Where the total eligible kilometre in Section 1 of the claim form is greater than 20,000 kilometres then these claims will normally need to be certified by an accountant/auditor who is not an employee or official of the body concerned. In exceptional circumstances claims may be certified by someone having sufficient financial standing and expertise, for example a current or retired bank manager.

FURTHER INFORMATION

For further information on BSOG eligibility and claim processes, please contact:

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Further copies of this document are available, on request, in audio and large print formats and in community languages (Urdu; Bengali; Gaelic; Hindi; Punjabi; Cantonese; Arabic; Polish).

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