



## Concessionary Travel Unit – Update on Performance

**Date of meeting** 17 March 2023

**Date of report** 2 March 2023

### Report by Treasurer

#### 1. Object of report

To update the Committee on the Concessionary Travel Unit performance, which includes a review of the administrative processing tasks undertaken by the Contact Centre and team resource and to provide an outcome summary of the support to the Young Persons' Free Bus Travel Scheme (U22's).

#### 2. Background

The update at the previous Joint Committee on 30 September 2022 provided insight to proposed digital solutions designed to improve administrative task efficiencies. Whilst some digital solutions are underway, a business improvement (BI) project has commenced with the purpose of reviewing the administrative processing tasks undertaken by the Contact Centre, the findings of which should outline necessary changes to SPT processes, suggest areas of consideration for Transport Scotland (TS) to remove complexity from the disabled National Entitlement Card (NEC) application and renewal process, and further support the requirement of proposed digital solutions.

The Concessionary Travel Unit team continue to operate a hybrid system of working in the office balanced equally with homeworking with full access to all telephony and support systems. The constant resource presence within the office has assisted in postal enquiries, maintaining a processing turnaround time of two days from date received.

#### 3. Current Position

##### 3.1 Digital Update

The previous update to the Joint Committee advised that the Contact Centre had begun Phase Two of the Noble Digital project. Progress has been made with the integration of the national Card Management System (CMS) and Application Programming Interface (API) project. However, the project is still ongoing and should be complete in the coming months with an update available for the next Committee meeting.

Once completed, the API integration will enable a self-serve functionality for cardholders, including the automation of replacement card requests by telephone and improved contextualised responses within the IVR menu, delivering specific information relating to cardholders. The API integration will benefit cardholders with an intended improved speed of response and reduce administration within the Contact Centre.

SPT is also scoping Project Manager (PM) resource to support the Contact Centre progress with digital solutions previously noted such as webforms. The outcome of the BI project should also inform key digital solutions for consideration to enhance customer experience.

The Contact Centre continues to provide routes to services for all customers including those with restricted or no access to digital means.

### **3.2 Young Persons' Free Bus Travel Scheme (U22's)**

The previous update to the Committee advised that the Contact Centre would develop a Young Persons' Free Bus Travel (U22's) helpline overflow service to support increased inbound call demand for four Local Authorities (LAs), following the marketing campaign launched on 20 September 2022.

The Contact Centre recruited 13 FTE (full time) agency staff - in effect this was creating from scratch an additional Contact Centre, almost double the Contact Centre's FTE resource. As well as staff recruitment, the U22's helpline involved developing our existing Contact Centre system to support the calls, resourcing the necessary IT equipment, engagement with the eligible LAs and providing the management input to the creation of this support service.

The U22's helpline was operational from 20 September 2022 and terminated on 4 November 2022. The card application uptake was lower than originally anticipated. During this period the U22's helpline handled 314 calls. Although call volumes were lower than forecasted, the agency staff were able to support the Contact Centre reduce the backlog of disabled and elderly concessionary travel related email queries by processing 80% of the total volume, while the main team processed 20%. The development was funded in full by The Improvement Service (IS).

### **3.3 Contact Centre Resource Review**

A review of current resource and projected resource required to maintain admin processing turnaround times enhanced processes/digital interfaces has also been undertaken. The report was presented to the Strategy Group on 24 January 2022 who recognised the current admin processing position was not sustainable for customer experience and approved the recruitment of two FTEs subject to budget approval, with a further review in 6 months to reassess the status of tasks handled within the Contact Centre and resources required to maintain processing turnaround times. Furthermore, the additional resource will enhance the service delivery of the Contact Centre as improvements should be gained from call handling performance and processing turnaround times.

The Contact Centre agent resource is currently 11.5 FTE so the approval of two FTEs will increase agent resource to 13.5 FTE.

### **3.4 Performance Results**

The Contact Centre agents are multi-functional, handling calls and admin processing tasks for both Concessionary Travel and the MyBus service. A conscious decision has periodically been taken to prioritise admin processing over call handling performance to ensure the customers core enquiry is resolved quicker. This does mean on occasion that call handling performance will drop consciously to support processing of admin tasks.

- Admin Processing
  - Year to date (YTD) the Contact Centre have processed 57,932 NECs. At this point the national CMS reporting functionality does not provide a breakdown of reason for card issue (i.e. replacement, renewal or first issue), however SPT are working with

the National Entitlement Programme Office (NECPO) to improve reporting capability.

- YTD the Contact Centre have processed 70,224 postal and email enquiries relating to Concessionary Travel, which include first time applications, renewals, and general enquiries.
  - SPT's aim was to significantly reduce the backlog of admin volumes before the energy price increase in October 2022 to limit financial difficulty to cardholders who were awaiting their NEC to be processed. The Contact Centre were able to reduce admin volumes by 4 November 2022 with the support of the U22's agency staff. The Contact Centre seek to maintain a four week or less turnaround timescale for admin processing. The team understand it is imperative to continue forward with this effort to prevent processing timescales exceeding four weeks which has a detrimental impact on cardholders particularly during the current economic climate.
  - Since the effort to reduce admin volumes in November 2022, admin processing timescales have remained at an average of two to three weeks turnaround time for the last five periods.
  - Further development of digital solutions and implementations from the BI project will help to manage demand and reduce processing times as efficiency gains are achieved.
- Call Handling Performance
    - YTD the Contact Centre have received 72,707 Concessionary Travel calls, with 79% of calls being answered.
    - As the Contact Centre are multi-functional, supporting both the Concessionary Travel and MyBus service, the YTD combined total number of inbound and outbound calls is 213,335 calls.
    - Demand continues to build and is now at 75% of pre-lockdown levels. The nature of "chasing progress calls" has reduced slightly (c.1000 calls) over the last 6 months since the last update to the Joint Committee, which is a positive reflection of the support from the U22's agency staff as there is a direct link to increased call volumes during periods of extended admin processing timescales. Call volumes remain manageable and call queues are actively managed in real-time to move resource from admin tasks to calls as required.
    - The completion of the API project will automate the card replacement process for cardholders who contact SPT by telephone, further reducing the manual effort required by the team. Greater contextualised response within the IVR with the API and CMS integration should provide a better customer experience for cardholders, which will result in improvements to call handling performance.

#### **4. Next steps**

The Contact Centre will focus on the completion of the API project and consideration will be given to the outcome recommendations of the BI project which will promote performance improvement and efficiencies to benefit the customer experience. Digital solutions such as webforms will be progressed with the support of the BI project outcomes and dedicated PM resource.

A review of the Contact Centre resource will be undertaken and will be reported to the Strategy Group in August 2023. The report will include efficiency gains from implemented digital solutions, adopted process changes informed by the BI project and performance position v resource required to ensure processing timescales do not exceed four weeks turnaround time. Protecting the current processing timescale position is vital to prevent the Contact Centre entering a backlog situation as this has a detrimental impact on customer experience which in turn leads to increased customer complaints and affects the team in supporting the customers.

## 5. Committee action

The Committee is asked to note:

- (i) the contents of this report;
- (ii) the progress made with digital enhancements;
- (iii) further future integration to improve the service further;
- (iv) the increase in Contact Centre resource to support customer experience; and
- (v) conclusion of support to the Young Persons Free Bus Travel Scheme (U22's) marketing campaign.

## 6. Consequences

Policy consequences	<i>None directly.</i>
Legal consequences	<i>None directly.</i>
Financial consequences	<i>None directly.</i>
Personnel consequences	<i>None directly.</i>
Equalities consequences	<i>Improved customer experience achieved via efficiency gains and performance improvements.</i>
Risk consequences	<i>Mitigations to minimise the risk to card holders.</i>
Climate Change, Adaptation & Carbon consequences	<i>None directly.</i>

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**Strathclyde Concessionary Travel Scheme Joint Committee**

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