



16 JUL 2020

Dear

On 7 June 2020, you emailed the Ministry of Social Development (the Ministry) requesting, under the Official Information Act 1982 (the Act), the following information:

- 1. How many StudyLink Customer Service Representatives (CSRs) were there between June 2017 and December 2019? I would prefer the number of CSR's in each separate month to be provided.*
- 2. Does StudyLink hire temporary CSR's to manage peak time in certain parts of the year?*
- 3. Any reports or analysis which went into the 2018 decision to expand StudyLink CSRs role in addressing a wider range of customer queries.*
- 4. Any documents or reports in 2018/2019/2020 which address or analyze StudyLink phone wait times.*

All aspects of your request will be addressed in the above order.

Please find Appendix A enclosed at the end of this response addressing question one of your request. Table one shows the number of Full-time Equivalent (FTE) StudyLink Customer Service Representatives (CSRs) between June 2017 and December 2019, broken down by month.

The number of FTE CSRs provided for the peak StudyLink periods has reduced over time as call volumes have reduced. The increased services provided by CSRs has, however, meant that despite the reduced call volume the workload did not reduce to the same level, which meant that staff were not able to keep up with the demand. This has led to increased wait times. The plans for the upcoming peak period will factor in the expected call volumes and new level of service provided.

In regard to question two of your request, StudyLink recruits temporary employees leading up to, and during, the peak period. Those staff are recruited from October to March, with the initial training taking place from October to December to ensure they are ready for the peak period from January to February. The exact number of temporary employees recruited may vary depending on what the expected volumes are and how many experienced staff already exist.

In regard to question three, the following document has been identified as being within scope of your request and is attached to this response:

- Project Plan: Contact Centre Transactions Transition Roadmap, dated 6 September 2018*

You will note that the names of some individuals are withheld under section 9(2)(a) of the Act in order to protect the privacy of natural persons. The need to protect the privacy of these individuals outweighs any public interest in this information.

You may also note that this document refers to a Client Face Role Review (CFRR). The CFRR review reassessed the Frontline and Contact Centre roles across the whole of the Ministry to better reflect what services are done in Contact Centres and in the front of house offices. In essence, this redesigned staff job descriptions. As part of this work, the StudyLink Officer role was realigned to the rest of the Contact Centre roles, which had been redesigned to allow staff to provide a wider range of services to clients.

The CFRR is not considered in scope of your request, as it was a broad, overarching review into the Ministry's front-line services to confirm that functions across Contact Centre operations were consistent. It did not directly contribute to the decision to expand CSR roles in addressing a wider range of customer queries.

In regard to question four, no documents or reports exist which analyse StudyLink phone wait times. As such, this aspect of your request is refused under section 18(e) of the Act as this information does not exist.

The principles and purposes of the Official Information Act 1982 under which you made your request are:

- to create greater openness and transparency about the plans, work and activities of the Government,
- to increase the ability of the public to participate in the making and administration of our laws and policies and
- to lead to greater accountability in the conduct of public affairs.

This Ministry fully supports those principles and purposes. The Ministry therefore intends to make the information contained in this letter and any attached documents available to the wider public. The Ministry will do this by publishing this letter on the Ministry of Social Development's website. Your personal details will be deleted, and the Ministry will not publish any information that would identify you as the person who requested the information.

If you wish to discuss this response with us, please feel free to contact OIA_Requests@msd.govt.nz.

If you are not satisfied with this response, you have the right to seek an investigation and review by the Ombudsman. Information about how to make a complaint is available at www.ombudsman.parliament.nz or 0800 802 602.

Yours sincerely

A handwritten signature in blue ink, appearing to be 'Geoff Cook', written in a cursive style.

Geoff Cook
General Manager, Contact Centre and Digital Services

Appendix A:

Table One: Number of Full-time Equivalent (FTE) Customer Service Representatives between June 2017 and December 2019, broken down by month

Month	FTE Customer Service Representatives
June 17	63.5
July 17	84.8
August 17	65.8
September 17	46.8
October 17	125.9
November 17	134.3
December 17	154.1
January 18	166.8
February 18	162.6
March 18	140.0
April 18	81.8
May 18	68.4
June 18	63.2
July 18	63.9
August 18	62.8
September 18	62.2
October 18	109.8
November 18	126.8
December 18	141.0
January 19	125.4
February 19	119.8
March 19	107.8
April 19	70.2
May 19	66.0
June 19	64.4
July 19	64.4
August 19	62.1
September 19	60.9
October 19	91.3
November 19	100.0
December 19	111.0



Project Plan

Contact Centre Transactions Transition Roadmap

6 September 2018

Business Group	Service Delivery
Project/ Business Owner	George Van Ooyen
Project Sponsor	9(2)(a) [REDACTED]
Project Manager	9(2)(a) [REDACTED]
Version	1.0

Objective ID: _ _____

Document Control

Document Version

Version	Date	Description	Author
1.0	6 Sep 2018	Initial draft for review	9(2)(a) [REDACTED] [REDACTED]

Document Review

Version 0.1

Role	Name	Review status
Project Sponsor	9(2)(a) [REDACTED]	
Senior User(s)	George van Ooyen, General Manager Contact Centre Services and Digital Channels Contact Centre Managers Manager Workforce Management, Analysis and Planning	

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1.0 Project Plan Summary

1.1 Purpose

This document describes an approach to effectively transition financial assistance transactions to Contact Centre Services.

1.2 Background

One of our primary priorities as a Ministry is to provide an efficient and timely service for our clients, making it easy for them to access and interact with us.

Service Support Team

For the past three years our contact centres have piloted the Service Support Team (SST) programme, which can complete all emergency financial assistance requests with clients from a chosen group of service centres across all regions. The purpose of this service at the time of launch was to:

1. Provide an accessible, timely service to clients experiencing hardship;
2. Reduce the number of client walk-ins for emergency assistance at service centres;
3. Minimise the risk of security incidents at our offices; and
4. Explore opportunities for additional transactions that could be delivered by phone

The pilot has successfully demonstrated that contact centre staff can perform an extended range of financial transactions in an efficient and timely manner. The overall response from clients and participating service centres has been overwhelmingly positive.

Client Facing Role Review

With the Client Facing Role Review (CFRR) now implemented, position descriptions for contact centre roles have been updated to increase the scope and breadth of financial transactions that can be completed.

The revised position descriptions now encompass all financial transactions formerly managed by SST staff, and the National Contact Centre Management Team (NCCMT) is committed to using this opportunity to review and redesign the delivery of the SST service in a way that can more efficiently scale to deliver more financial assistance across all clients.

Implementation

NCCMT has commissioned the development of a transition plan, to complete the integration of SST and expansion of financial transactions across all contact centre staff within the next 18 months. This includes an expectation to reintegrate the current SST staff into the wider contact centre from 1 October 2018.

The work plan will apply key principles that prepare us for future provision of implementation of these transactions within the CSR role with the SST reintegration as its highest priority.

1.3 Principles and Objectives

Key project stakeholders have defined the following principles and objectives to guide the implementation of the Transaction Transition project:

Key principles

- Focus on areas where we are able to score quick wins first
- Engage in a transparent and robust process to interact with all contact centres, Regional Directors, SST teams, and PSA
- Ensure all transactions which require a current face to face appointment are considered in the transition process
- Ensure transactions are delivered using the most cost effective, appropriate and accessible channel for each client, whether this is online or by phone
- Ensure the right training and support is in place for all staff to support transition
- Include all contact centres (excluding Job Connect and Centralised Unit Housing)

Transition objectives

- Achieving identified outcomes could occur in more than one step, or change based on resource constraints
- Utilise existing SST expertise to drive wider capability improvement
- Reintegrate current SST staff in wider contact centre teams and services
- Implement transition with minimal impact on Business-As-Usual performance

2.0 Stakeholders Engagement

The project team will regularly engage with the following stakeholder groups during the development and implementation phases

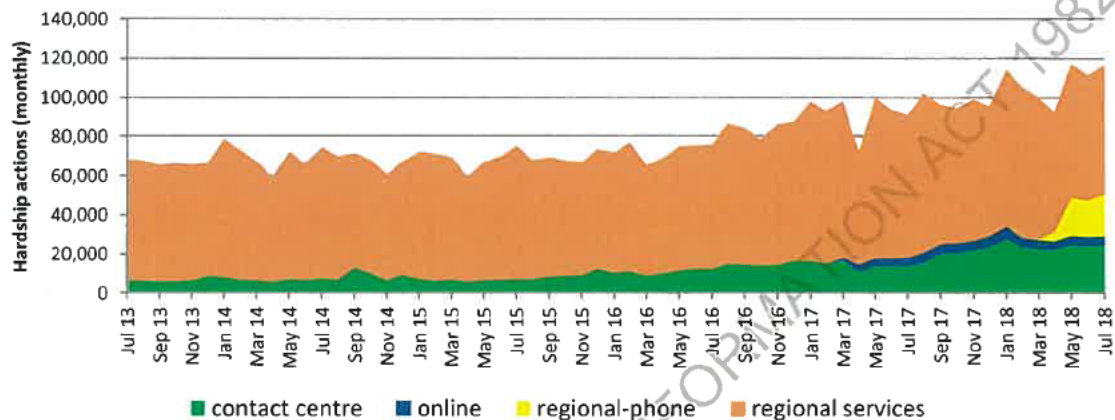
- George Van Ooyen – General Manager, Contact Centre Services
- Contact Centre Managers
- Service Support Team Managers
- Service Managers – CCS
- SST team members and all Staff
- PSA

3.0 Current State

Hardship Assistance by Channel

Currently the CCs complete a range of financial transactions – however, there are still a large number of these transactions that are completed by Case Managers at our Service Centres – including Hardship Assistance.

Financial Assistance (Hardship) completed per month, by Channel



The above chart shows that while hardship assistance transactions completed by contact centres have increased significantly since SST's implementation (from 6,500 per month in July 2014 to 25,000 per month as-at July 2018), it's worth noting that the number of transactions completed by regional services has not reduced. Instead, the overall number of hardship applications being processed has steadily increased.

This creates substantial workload pressures on Regional Services staff.

Through the SST pilot, contact centres have tested their ability to complete a large range of actions in a timely and cost effective manner. This service has proven its success with an overall positive feedback from clients and Service Centres involved in the pilot.

The pilot positively impacted:

- Client Experience
- Timeliness
- Reduction in safety and security incidents

An analysis of repeat callers to contact centres suggests that in many cases, financial assistance transactions in service centres are not completed within client's expectations, leading to a poor client experience, further hardships for clients, and creating challenging interactions with CSRs and other staff members.

Moving these transactions to the appropriate channel will support the Ministry's objective of making it easy for our clients and positively improve client experience and create space for our Case Managers to connect and work more effectively with our clients.

Existing Service Support Team operational model

Currently, SST operates as an outbound, callback service. Clients with emergency hardship needs (that belong to an SST-pilot site) are identified by inbound CSRs when there are no available emergency assistance appointments in the office. These clients are then called back by SST within a target timeframe of 100 minutes.

There are 50 SST-trained CSRs (with an additional 12 who have limited SST-type skills); in the past financial year, there were 154,000 SST transactions recorded, with an average handling time of 17 minutes.

Issues with existing SST model

- Does not support our 'First Call Resolution' intent (callbacks)
- Client experience is not consistent
 - Clients moving between an SST-pilot service centre and a non-pilot service centre may be confused that the service is no longer available
 - Access to the SST service is inconsistent, governed by availability of emergency appointments in the client's office
 - Turnaround time for SST call backs are influenced by contact volumes and staffing levels
- 33,000 (21%) of SST interactions were resolved "unable to contact client", resulting in clients with unresolved needs, wasted resources, and repeat work

Phone-Based Appointments

The last few months has also seen the large-scale implementation of "phone-based appointments", which are managed by Regional Services. In this process, clients 'book' a standard appointment (whether through MyMSD, contact centre, Case Manager or receptionist), however the appointment itself is conducted by the service centre Case Manager outbound calling the client at the specified time.

This is an additional attempt to improve the client experience by making interacting more accessible and easier for clients. Additionally, regions can utilise resource imbalances across different service centres by enabling Case Managers from 'quieter' offices to manage the Phone-Based Appointments for busier service centres.

Challenges associated with Phone-Based Appointments

- Lack of contact-centre efficiency technology
 - All calls are managed through an outbound service
 - No 'VET' routing to deliver self-services and manage client identification
 - No call recording
 - No real-time performance metric reporting
- A smaller pool of staff means it's more likely that unanticipated delays or issues will cause the callback to happen at a different time to scheduled, impacting the client experience and potentially causing rework

Ideally, through efficiencies of scale and technology, contact centre staff can manage financial assistance transactions for clients more efficiently, although there is no region regional services staff can't be incorporated within this delivery mechanism.

4.0 Future State

In an ideal future state, clients can manage all financial transactions within the most accessible and efficient channels for them - online, or by phone. Service centre appointments may be used for proactive engagement, developing and managing ongoing relationships with clients, assisting clients with more complex needs, and supporting client outcomes.

Contact Centre Services

CSRs will be completing a wider range of additional transactions, and all financial assistance can be delivered to clients through their first contact - with CSRs completing start to end processing.

The SST service will be integrated as a part of the CSR role and the service will have a staggered shift to an inbound service model.

Digital Channels (MyMSD)

MyMSD will also increase the scope and breadth of financial assistance available online. For applications that cannot be completed automatically, or those that require staff interaction, MyMSD will act as a facilitation function to engage with CSRs, rather than opting the client out and forcing them to call an 0800 number to start the application process again.

Timeframes

The transition to future state is expected to commence by 1 October 2018, and be completed by December 2019.

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5.0 Transition Approach

5.1 Transition Overview

The transition to future state will be managed over three phases:

1-Model

Transition to a more scalable model for SST

This phase consists of:

- Reintegrate existing SST Staff within the CCs teams
- Rebrand SST [new name]
- Engage with existing SST teams / SMs to define new service expectations
- Initiate building SST-type capability across other staff members within the CCs
- Redefine 'NEW' SST service model
- Transition to a primary inbound service

2-Scope

Increase scope of Financial Transactions managed (within existing SST pilot service centres)

This phase consists of:

- Leverage learning from the current SST pilot and Phase one to identify additional quick-win transactions
- Deploy new transaction processes [with training, communication and support]
- Continue to develop SST-type capability across additional staff

3-Expand

Extend service nationwide

This phase consists of:

- All contact centre staff now have full SST capability
- Engage with Planning and Analysis team to establish the FTE availability / capability to form the roll-out strategy
- Connect with regions to share the roll-out plan / strategy
- Services roll-out for clients across additional service centres in-line with the plan.
- Nationwide roll-out completed

5.2 Phase 1 – Transition to a more scalable model for SST

1-Model

This phase is about resetting the expectations of SST as a service (both from existing SST staff, wider CC staff, and clients) – and transitioning our existing SST model to one that has the capacity and capability to scale efficiently across more financial assistance transactions and across all service centres.

Note that consultation and engagement with staff and manager stakeholders is genuine – as such, specific components may be subject to change if alternative solutions or approaches are presented.

Date	Milestone
29/08/2018	Engagement with site PSA delegates initiated
6/9/2018	Draft project plan completed, submitted to National Contact Centre Management Team for consideration and endorsement
10/09/2018	Project Plan shared with SST SMs and defining the 'new scalable' service model. Rebranding of SST
17/09/2018	Reintegrating SST staff initiated across sites
17/09/2018	SST SMs meet and draft 'new scalable model' Identify additional transactions that can be added to our current list of actions across participating sites in-line with new model Define training requirements.
20/09/2018	SST 'New Scalable Model' shared with Project Sponsor and other stake holders
24/09/2018	Initiate building 'New Scalable Model' capability across other staff members within the CCs across identified action types. Initiate building 'New Scalable Model' additional Financial Transaction capability for existing SST CSRs.
01/10/2018	Increased SST-type capability scaled up for wider group of CSRs
15/10/2018	Implementation of inbound queue and warm handshake process, to replace SST outbound function

5.3 Phase 2 – Increase scope of financial Transactions

2-Scope

In this phase, the operating model for SST has now been re-established, and it's effectively and efficiently operating as an inbound model – however, not all CC staff are yet trained.

This phase is about increasing the scope and breadth of financial assistance transactions delivered through the contact centre service, and continuing to extend training and capability across the wider contact centre staffing group.

Service Centre support is still limited to the pilot group to enable controls over business processes and staffing requirements while the new transactions are embedded.

Date	Milestone
15/10/2018	Additional Financial transactions selected (based on quick-wins identified through SST pilot, phase 1, other pilot work)
2/11/2018	Training programme developed to support financial transactions, support and communications plan developed
5/11/2018	Training of staff in new financial transactions begins
16/11/2018	Training of staff in new financial transactions completed
November 2018	Continue to expand existing pool of CSRs; further blending of SST-type inbound queue with other general queues
December 2018 – April 2019	Continue to identify and deploy additional financial transactions with appropriate training, support and communications

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5.4 Phase 3 – Extend service nationwide

3-Expand

By this phase, all contact centre staff are capable of delivering the full, "SST-type" financial assistance service to clients.

In this phase, we will retire the use of a separate inbound queue (as the capability is now a core delivery) and focus on tactical expansion of the service centres in scope (prioritised according to demand, FTE capability, and in consultation with Regional Services) until the service is nationwide.

Date	Milestone
May 2019	Training programme commences to any remaining staffing groups not yet transitioned
May 2019	Additional service centres / regions are identified and onboarded in extended programme
1 July 2019	Separate inbound queue is retired; all transactions now managed as part of 'General' inbound capability
July-November 2019	Continuing expansion and rollout to remaining service centres
Dec 2019	Programme completed

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6.0 Engagement and Communications

6.1 Staff Communication and Engagement Approach

A complete Transaction Transition communication and engagement plan will be designed in line with the roll-out strategy using expertise from within our Communications team and all stakeholders.

Communications Principles

The following principles will guide the development of the communications approach

- Build trust with transparency and responsiveness
- Provide clear, simple, audience-centric communication and supporting information
- Strengthen our brand, service culture and reputation

Communications and Engagement

At a high level, the communications and engagement approach will be initiated with

- SST SMs, CCM and Project Sponsor
- SST staff and SST SMs
- Regional Director and Project team
- Training Team and Project Team
- PSA and Project team

6.2 Engagement with PSA

Engagement with PSA will be at a site level and based on the below principles

- **Principles** – Principles and expectations underpinning the relationship between MSD and PSA, as per the Agreement for Modern, Innovative and Productive Public Services
- **Working Together** - MSD and PSA will adhere to existing protocols in accordance with the Modern Innovative Productive Public Service (MIPP) agreement.

6.3 Engagement with Regional Services

Our Regional Services will be engaged at every stage of the project with the primary aim to gain their support and input towards the roll-out of the new service model. Regional services will also be included to identify resource and knowledge which can be leveraged to ensure project's success.