Outlining a proposed alternative customer service program for the U-Pass BC program

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1 Executive Summary

Being the largest university in British Columbia with over 50,000 students, UBC has had a significant increase in the number of students and faculty using public transportation within the Greater Metro Vancouver Area over the course of the past decade. Since the establishment of the U-Pass program in 2003, UBC and the Alma Mater Society (AMS) of UBC Vancouver has taken on the role and challenge of creating and maintaining a functioning system that works directly with the University in addressing bureaucratic mandates affiliated with maintaining and operating the U-Pass BC program.

In recent years, the Office of Vice President, External Affairs (VPX) has seen a rise in the number of student questions, concerns, and customer service cases being forwarded from UBC Enrollment Services to the VPX, and directly from students. Recognizing the need to respond and accommodate students efficiently and effectively, the VPX has proposed the launch of a new specialized U-Pass BC customer service office, designed specifically for the purpose of addressing all questions, issues, and concerns into one centralized location.

2 Purpose and Scope

The intention behind creating a separate office designed to cater to questions and concerns surrounding the U-Pass program comes at a time where transit across the Greater Vancouver Area is transitioning to a new system called Compass; with which UBC is the largest collective organization to have participating members. The transitional period between current “Phase 1” distribution of monthly paper passes and “Phase 3” distribution of electronic fare medium includes many challenges, both on the implementation and communications fields. On implementation and the ultimate effect on students, students will have to learn how to utilize the new student user website, how to acquire a card, how to register a card with a U-Pass BC benefit, and what the terms & conditions will be for the program. The VPX and UBC expect a significant bump in customer service related cases from 350 per month to over 600, based on the magnitude of the transition and the current breakdown of service cases.

On campus, students also have significant issues with front-counter assistance on U-Pass BC related issues. Students are being shuffled from point A to point B, often from the Carding Office, the AMS, UBC Transportation Planning, or UBC Enrollment Services when they have a question or are faced with a problem, and at times communication of information between departments and students may be inconsistent or delayed. One of our primary goals in establishing a specifically designated office for the U-Pass program is to streamline all U-Pass related resources to the program to a conveniently central location that has the capacity and protocols in place to respond to technical and bureaucratic problems quickly and efficiently, acting as the central conduit between the university, students, and the AMS.

Furthermore, a large series of student questions and concerns have been directed to the VPX; unfortunately, the VPX does not have the necessary time or jurisdiction to address a significant portion of the cases it receives. The VPX will be in charge of implementing the new customer service office for the U-Pass BC program and it will monitor the allocation of resources, along with establishing a functioning mandate to ensure that all students are receiving the same information, and that each specific case is given the proper attention it deserves. However, once the service is established, the VPX will only service as an advisor to the U-Pass BC office on contract related issues, and on re-negotiations of service agreements.
We understand that a newly established U-Pass office would have to work with UBC Enrollment Services given that certain bureaucratic functions would be out of its jurisdiction; however, the office would have to have an agreement between UBC and the AMS that allows for increased access to student information, with a corresponding non-disclosure agreement, and memorandum of understanding on operations and jurisdiction.

The mandate of the U-Pass office is geared towards facilitating an efficient and easily accessible central hub of information for students and faculty alike. The purpose of the office is to:

- Respond to U-Pass BC related inquiries and customer service requests
- To respond to requests in a timely fashion, but with thorough response
- To address students issues concerning the Compass program and the U-Pass BC program as a whole
- Help advise students on issues concerning fare-enforcement.
- Work with the university to adjudicate exemptions and service requests
- Work with the AMS and UBC to communicate to all students on program details

The procedural system that would be required to be put into effect would give the U-Pass BC office employee(s) the tools they require to provide greater flexibility to students and faculty for getting the information they require with respect to the U-Pass program, including an online customer service module, phone support, and an in-person front counter space for cases to be managed. This would also require additional resources from UBC Enrollment Services for additional access to the Student Information Service Centre (SISC) to pull up eligibility information for students to provide a greater-real time response. However, at no point would the AMS or any member of staff have the jurisdiction or ability to modify student accounts or make decisions on student eligibility without the proper consultation with UBC Enrollment Services.

3 Finances

Our breakdown of costs affiliated with establishing a new U-Pass office is drafted in Table 1.1.

**Table 1.1**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service Module</td>
<td>$400.00</td>
</tr>
<tr>
<td>Staffing costs (Tier 3, 15/hr.)</td>
<td>$9,750.00/$4,875</td>
</tr>
<tr>
<td>Printing</td>
<td>$50.00</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>$50.00</td>
</tr>
<tr>
<td>Phone</td>
<td>$270.00</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$10,520/$5,646</strong></td>
</tr>
</tbody>
</table>

While the office would function on a roughly $6,500 annual budget, we would recommend an additional $2,000 in funding to be allocated if usage requires additional staffing hours or resources. Our prospective sources for funding are from:

- AMS Service Fees
- Contributions from UBC Transportation Planning
- UBC Enrollment Services
Contributions from AMS Central Operating Budget
Contributions from the University & External Lobbying Fund

4 Limitations and Concerns:

Some of concerns with respect to a new U-Pass BC office include the shifting culture of having a centralized location which deals specifically with all U-Pass affiliated concerns; recognizing that it might take time for students to understand the goal and intention of the office. We hope to minimize the adjustment period by properly promoting the office through the AMS website, and through other means of communication. The VPX will oversee the transition and adjustment period with the help of the UBC Transportation Planning department and UBC Enrollment Services.

Another limitation which has been raised is the offices capacity to handle the influx of concerns it must address during peak times. We recognize that the office will essentially be staffed by one individual at most; and the training procedure for that individual will provide its own challenges with it being the first staff member to ever work in the office. Furthermore, there cautionary mechanisms which need to be put in place before the hiring of a new staff member; particularly to ensure that the sensitive information’s which they will have access to will be handled with care.

5 Jurisdiction & Role of the VPX:

With the introduction of a separate office under the portfolio of the Executive Coordinator of Student Services (ECSS), the VPX would be absolved of day-to-day customer service management, with the exception of the training process. The VPX would be responsible for helping to orient a new customer service agent(s) at the point in which the office is created, and would help advise the office on contract-related issues that require a second opinion outside of UBC. However, the position would report directly to the ECSS, and operationally would be directed by that portfolio.

The VPX also currently sits as a member of the U-Pass Advisory Committee (UAC) along with all other contract signatories at the other post-secondary institutions and student associations. The UAC is responsible for reporting about service issues related to U-Pass BC, informing organizations about administrative information on the program, and is also the vehicle responsible for contract negotiations. In this capacity, the VPX would continue to sit on the UAC as the AMS’s voting designate, however, the U-Pass BC office would be required to also contribute on the UAC in an advisory capacity to the VPX, and may be invited to attend meetings with the VPX. For contract negotiations, the VPX will remain the main negotiating body for the AMS, but with the assistance of the U-Pass BC office, or the ECSS.

6 Summaries:

Since its launch in 2003, the U-Pass program has been diligently dealt with by Enrollment Services and the VPX office. It should be noted that among all its counterparts, UBC is the only Post-secondary institution in British Columbia that does not have a dedicated U-Pass office to deal with student questions and concerns program. The UBC Carding Office along with the VPX and UBC Enrollment Services have been the face of customer service for the U-Pass BC program for the past decade; with the transition of the transit system to the Compass Program there would be a definite benefit to have a designated centralized location introduced with the intention of dealing specifically with the U-Pass BC program.