

<b>Item No:</b>	<b>Classification:</b> Open	<b>Date:</b> 15 December 2009	<b>Meeting Name:</b> Executive
<b>Report Title:</b>		Freedom Pass Renewal Update	
<b>Ward(s) or Group affected:</b>		All	
<b>From:</b>		Deputy Chief Executive	

## **RECOMMENDATION**

1. That the Executive notes the Freedom Bus Pass & Blue Badge Service improvement programme in response to the recommendations of the Scrutiny Committee.
2. The Executive notes the revised process for renewal and the responsibilities for both the Council and London Councils, including mitigating actions in place for tackling risks associated with the renewal.
3. The Executive notes the delivery plan for the renewal and action taken to address concerns in respect of client vulnerability.

## **BACKGROUND INFORMATION**

4. In October 2008, Scrutiny Sub-Committee C commenced an investigation into Southwark Council's handling of the renewal process for Freedom Passes. This included the delays in completion of the renewal cycle, the provision of information to Freedom Pass holders and the treatment of those seeking to renew their Passes.
5. The Sub-Committee reported its findings for the Executive to consider on 16 December 2008, and requested a written update report within two months. This is an update to the report tabled to the Executive in July 2009.
6. This report represents the Executive response and shows what actions are being taken to improve the service – and to prevent recurrence.
7. Client Services have extended the scope of the recommendations beyond Freedom Passes to include the renewal process for Blue Badges.

## **KEY ISSUES FOR CONSIDERATION**

### **The revised application process**

8. TFL and London Councils have changed the approach in respect of the processing of applications for Freedom Bus Passes (FBP). The key reason for this is around the technology required to process the new style passes which will have to comply with the national smartcard standard known as ITSO under

government regulations. As a consequence of the need to put the photograph of the holder on the pass it will no longer be possible to issue passes over the counter.

9. Customers aged over 60 will no longer need to be assessed for eligibility as they will automatically qualify for an Older Persons Freedom Pass and can apply directly to the Post Office for their FBP.
10. Those customers who may require assessment for a FBP in respect of their disability will still need to make an application to the Local Authority. Some of these applicants will meet one or more of the automatic eligibility criteria so will not need an assessment.
11. Customers who need medical evidence in support of their application will now have access to a team of Occupational Therapists rather than requiring their GP's to confirm their mobility status.
12. Once their eligibility status has been confirmed they will receive a letter advising them of this and then early in the New Year will be sent the Letter of Authorisation to be taken to their nearest Post Office.
13. The Post office will verify the customer's identity and send the information to a 3<sup>rd</sup> party bureau who will issue the FBP directly to the applicants home address within 10 working days of receipt.
14. The bureau will start to process and issue passes in January 2010 with a view to completing by the end of March;

### **Freedom Bus Pass Statistics**

15. The following table gives a detailed breakdown of the numbers involved:

<b>Client Group</b>	<b>Number of FBP's</b>	<b>Assessment Approach</b>
Over 60's	2,220	Letters sent encouraging customers to directly go to the Post Office
Re-assessment letters	1812	Letters with application forms sent encouraging early responses
Automatic assessments	3,565	Letter sent stating they automatically qualify for a Freedom Pass and will receive their approval letters early January
Recently turned 60 or by mid April	32	Letter sent encouraging them to apply directly at the Post Office for an Older Persons Freedom Pass
In Progress	905	These require further checks

		which will be completed by 25/11/09
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## Delivery Plan

16. A detailed timeline is shown in Appendix 2. Some critical dates are outlined below:

TASK	PLANNED COMPLETION DATE
Initial letters to all Southwark customers who currently hold a Freedom Pass	20/11/09 (sent)
OT Assessment Centres held	31/01/10
Letters of Authorisation ready to send out to all automatics and successful applicants assessed to date	15/12/10
Letters of Authorisation sent out to all automatics and successful applicants assessed to date	29/12/09 (TBC)
Letters of Authorisation taken to the Post Office by the customers	13/02/10
Bureau to issue new style Freedom Passes	31/03/10
Old Style Freedom Passes stop working	31/03/10
New Style Freedom Passes start working	01/04/10

## Action taken to address previous issues

17. The programme of improvement has looked at the process from start to finish and implemented a number of key changes. In particular the following actions have been taken following the 2008 renewal process:

### *Medical evidence in support of application*

18. One of the key issues in the 2008 renewal related to the gathering of information from medical professionals in support of assessments. The team was reliant on information supplied by GP's. Two healthcare Occupational Assessment companies will undertake this function and Southwark has been given assurances as to their capacity to deal with the throughput of customers. Arrangements have been made for Assessment Centres to be held on Saturdays as well, as this may be more convenient for those who are working.

### *Use of existing information*

19. Issues in the 2008 assessment related to accuracy of data and use of existing information in relation to pre-existing medical conditions. The team will now have access to additional information in CareFirst which will be used in support of the assessment process and validation checks are also being made against other Council systems such as Council Tax and Benefits.

### *Case Management*

20. Tracking of cases received will now be possible via Carefirst and a newly

implemented Document Imaging System. The processing bureau will also offer customers a telephone number to track the issue of their new FBP.

#### *Telephone call handling*

21. In the 2008 renewal staff were unable to meet customer contact demand. Since then a dedicated team of CSRs has been put in place within the CSC to assist customers with telephone enquiries. Performance to date shows approximately 1700 calls are being received per month with the average call waiting time approx. 20 seconds (over the last 7 months).

#### *Resilience within the assessment team*

22. The FBP team has additional resources now in place who have received training over the last 6 months in the assessment process. There are in fact 3 additional staff in post for assessments and a number of staff now handling calls in the CSC.
23. Two fully trained staff remain within Walworth One Stop Shop and all staff will shortly be receiving training specifically aimed at the assessment process. The two members of the Blue Badge Team permanently based at WOSS will also be available to provide additional support to the Blue Badge Team based in Client Services should the need arise.
24. Four benefit officers are also in the process of receiving training to complete assessments should the need arise.
25. Appeals – these are dealt with by Health & Social Care, managers are being asked to ensure there is sufficient resilience in place to deal with any increased volume.
26. Occupational Therapist assessments – sessions have been booked with the two providers to meet demand throughout December & January. If necessary an agreement is in place to undertake assessments in February as well.

#### *Vulnerability*

27. The programme is ensuring where customers require further assistance this can be provided by either the Pension Service joint team, Walworth One Stop Shop staff or by existing professional support.

#### **Communications**

28. The programme has sought to address the issues in relation to lack of communication with key stakeholders in a number of ways. Several presentations have been held with community support organisations across the borough detailing the revised process for renewal and outlining customer requirements. To date 15 organisations have received personal visits and more are planned.
29. Customers affected by the renewal process have received personal letters informing them of the revised process, this should pre-empt any contact from customers in the first instance.
30. Further communication is planned in the weeks leading up to and throughout the

renewal process including full page advertisements in the local press.

**Risks**

- 31. A full risk register has been maintained throughout the programme and a risk register is available on request.

**FINANCE DIRECTOR COMMENTS**

- 32. None

<b>Lead Officer</b>	Eleanor Kelly, Deputy Chief Executive	
<b>Report Author</b>	Dominic Cain	
<b>Version</b>	Final	
<b>Dated</b>	7 <sup>th</sup> December 2009	
<b>Key Decision?</b>	No	
<b>CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / EXECUTIVE MEMBER</b>		
<b>Officer Title</b>	<b>Comments Sought</b>	<b>Comments included</b>
Finance Director	Yes	Yes
<b>Executive Member</b>	No	No

**BACKGROUND DOCUMENTS**

<b>Background Papers</b>	<b>Held at</b>	<b>Contact</b>
Report on the Issue and Renewal of Southwark Disabled Persons Freedom Passes 2008	Scrutiny Sub-Committee C	Jennifer Seeley, Assistant Finance Director 020 7525 0625
Freedom Pass Review	Scrutiny Sub-Committee C	Everton Roberts 020 7525 7221
Freedom Pass Review – Comments of Overview and Scrutiny Committee	Overview and Scrutiny Committee	Everton Roberts 020 7525 7221
Programme Risk Register	Programme Manager	Serena Dungate 07702505039

**APPENDICES**

<b>No.</b>	<b>Title</b>
Appendix 1	Freedom Passes Scrutiny Committee Recommendations
Appendix 2	Timeline

## **Appendix 1 – Freedom Passes Scrutiny Committee Recommendations**

- 116 Bulk Renewals: The council should lobby for a rolling programme of renewals of Freedom Passes
- 117 Discretionary London Only Freedom Passes: The council should complete a full assessment of the costs and benefits of continuing with discretionary London Only Freedom Passes, well in advance of 2010.
- 118 Use of GPs: The council should complete a full assessment of the costs and benefits of appointing its own occupational therapists for those people who require an assessment, rather than relying on local GPs and consider cross borough working on the use of Occupational Therapists
- 119 Use of GPs: If GPs are to be used in the future; the design of the form should be reviewed in conjunction with local GPs
- 120 Carefirst: Further information on the system capabilities should be identified with Health and Social Care and Customer Services working together. Staff who use the system should receive further training, particularly on data entry, exception reporting and generating correspondence from the system. There should be joint meetings between Health and Social Care, Customer Services and Information Services. Particular attention should be given to the system's ability to identify persons entitled to automatic renewal and to generate the necessary communications.
- 121 Service transfer: Staff and senior manager should be closely involved in discussions around the transfer of services and the implications for service delivery
- 122 Service Transfer: All service transfers must be better planned and implemented, including the use of formal project planning tools and agreement of the implementation plan by both receiving and old departments. A "soft landing" is preferred with the "giving" service retaining responsibility for and an interest in the "receiving" service performance. Plans must include consideration of IT, staff training, parallel running and known workload issues.
- 123 Communication: All service delivery changes should be, at least, publicised or communicated to relevant groups. Depending on the level and impact of the change there may be merit in consultation about the proposed changes. In cases of significant change, prior notice should take place.
- 124 Communication: The council must adhere to its own service standards for all external phone calls, and particularly in the contact numbers given for Freedom Pass enquiries, 020 7525 2141/2306. Different ways of managing the volume of calls received should be considered.
- 125 Communication: All staff working within One Stop Shops should receive specific training on the needs of people with disabilities

- 126 One Stop Shops: The departmental business continuity plans for One Stop Shops should be reviewed.
- 127 Application forms: The Disabled Persons Blue Badge and Freedom Pass Application Form” and NFP renewal forms should be reviewed, in conjunction with customers or their representatives.
- 128 Renewal Process: Consideration should be given to an earlier start to the renewals process for 2010, particularly for those people who are likely to have an automatic renewal.
- 129 Staffing: a full review of the process for assessing applications and the number of staff required to do so should be completed well in advance of January 2010, with a view to identifying additional resources. The review should encompass the desirability of decisions about entitlement being made by a team in a single location. Staff training should be improved to ensure: 1) better general understanding of the issues facing disabled people: 2) assessment of entitlements under the various eligibility criteria: 3: full proficiency in and proper use of the Carefirst database.
- 130 Relevant Numbers: A full history of the numbers of people who applied for or received NLP and LFP in 2008, including a chronology of dates and numbers or passes assessed at particular dates should be compiled and used to inform arrangements for the 2010 issue and renewal process
- 131 Case Management: There should be a robust case management system and strict limits for the turnaround of applications, request for documents, and chasing the necessary evidence. In particular, there must be no repetitions of delays in scanning documents and entering them into the system.
- 132 Carefirst: Subject to the review of local London Only passes continuing in 2010, the Carefree parameters should be amended so that accurate numbers can be obtained on the number of NFP and local discretionary passes
- 133 London Councils: The council should commit to attending all of the London Borough Liaison Group meetings for Freedom Passes. The representation should be at a level to ensure that any actions arising can be implemented and that the implications or consequences are properly communicated within the council.
- 134 London Councils: The council should identify from London Councils all similar borough liaison groups, evaluate whether attendance is necessary and commit to engaging relevant groups.
- 135 Post Office Ltd: Through the London Councils or otherwise, the Council should become better aware of the role of the Post Office and the need to stock adequate numbers of Freedom Passes.
- 136 The Council work with the PCT to ensure that any outstanding amounts due to GPs are paid without any further delay.

- 137 That steps to ensure that all fresh data relating to applicants be promptly entered into the Carefirst system, The Southwark Audit and Governance Committee be invited to address the issue.