





# Workplan report – 2014/15

The measures detailed in this plan monitor the performance of Passenger Focus against delivering its Workplan objectives. They are grouped according to our strategic aims. The status of each indicator is populated by the owner, and is an indication as to how well they feel work is progressing. Please note barriers to success in the achievements so far column. The colours used indicate the following:

- |   |   |  |
|---|---|--|
|  | = exceeding expectations  | - please include reasons for success             |
|  | = on track  |  |
|  | = some concern about our ability to meet all of the objective             | - please include reasons for barriers to success |
|  | = significant concern about our ability to meet any part of the objective | - please include reasons for barriers to success |

Please keep the entries as succinct as possible and update any items in the recent achievements column with anything achieved through work in progress/outstanding work from the previous reporting period.

If the entry is growing beyond a few bullet points it may be that a separate paper is needed.

Do not duplicate what others have written- it will be up to the responsible owner (or a deputy) to edit.

If something is not changing for a long period comment on this.

## Management Team - Board Report

### 1. Understanding the needs of passengers

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PAX1	<b>Key objective</b> <ul style="list-style-type: none"> <li>Increase the size (reach 40,000 passengers) and usefulness of the Bus Passenger Survey</li> </ul>	<ul style="list-style-type: none"> <li>Autumn wave completed. over 47000 sample</li> </ul>	<ul style="list-style-type: none"> <li>Publication and presentation documents being prepared</li> <li>Tender document being finalised for issue in Feb 15</li> </ul>	<ul style="list-style-type: none"> <li>Shrinking budgets especially local authorities</li> <li>Retendering starts this year</li> </ul>	IW
PAX2	<b>Key objective</b> <ul style="list-style-type: none"> <li>Publish the first Tram Passenger Survey</li> </ul>			COMPLETE	IW
PM1.1	<b>RAIL</b> <ul style="list-style-type: none"> <li>Publish autumn and spring National Rail Passenger Survey – including more route-based NRPS data</li> <li>Publish research enabling us to better understand passengers’ trust</li> <li>Improve transparency levels on rail performance data</li> <li>Increase understanding of Community Rail Partnerships through the NRPS boost study of CRPs</li> </ul>	<ul style="list-style-type: none"> <li>Autumn 2014 NRPS published. Included boost on 12 Community Rail Partnership lines</li> <li>Published Information Screens research</li> </ul>	<ul style="list-style-type: none"> <li>David Greeno presenting Community Rail Partnership (CRP) findings at Designated Lines seminar in March, and to CRP steering group</li> <li>Presenting Rail Priorities and Trust to Passenger Services directorate 11 Feb</li> </ul>		IW
PM1.2	<b>TRAM</b> <ul style="list-style-type: none"> <li>Use the results first TPS to drive improvements for passengers</li> <li>Repeat the TPS subject to funding.</li> </ul>	<ul style="list-style-type: none"> <li>Fieldwork completed</li> </ul>	<ul style="list-style-type: none"> <li>TPS Wave 2 analysis nearing completion</li> <li>Stakeholder meetings for presenting TPS results are planned for February 2015</li> <li>Seeking opportunity to present at Light Rail Conference in June</li> </ul>	<ul style="list-style-type: none"> <li>Year to year funding inefficient and may appear insecure from boost funders perspective</li> <li>May need to reconsider our funding of minimum sample for NET and SYPTE moving forward</li> </ul>	IW
PM1.3	<b>COACH</b> <ul style="list-style-type: none"> <li>Pilot a new coach passenger satisfaction</li> <li>Introduce it to the industry, committing operators to an action plan to improve scores</li> </ul>		<ul style="list-style-type: none"> <li>Hoping to discuss with Tom Stables and new NX insight person.</li> <li>May be interested in looking at airport surface access as a way of trialling</li> </ul>	<ul style="list-style-type: none"> <li>Met with National Express in summer 2013. They are only interested in co-funding if Megabus were on board</li> <li>Letter sent from Anthony to Megabus, but as yet no interest</li> </ul>	IW/DS
PM1.4	<b>ALL MODES</b> <ul style="list-style-type: none"> <li>Produce a pilot, regional, cross-modal satisfaction report</li> <li>Continue to develop the Smart Ticketing programme</li> </ul>	<ul style="list-style-type: none"> <li>Advance on the Day tickets – Cross Country pilot -2 waves completed, report to be published February / March 2015</li> <li>On Advisory Board of Transport Ticketing 2015, Knowledge Partner status. Spoke at Transport Ticketing Conference 27 January</li> <li>Participating in Transport Card Forum Steering Group. Had three speaking slots at their main 2 day meeting in September 2014</li> <li>Norfolk Wave 2 completed - well received, several presentations given. Report to be published February/ March 2015</li> <li>PlusBus project fieldwork complete, Findings presented to PLUSBUS and ATOC on 10 December then presented to CPT board on 20 Jan</li> <li>Use of Contactless cards for rail travel (Chiltern pilot) published December 2014</li> </ul>	<p>Projects in progress - all to be published during 2015:</p> <ul style="list-style-type: none"> <li>South East Flexible Ticketing on Rail (SEFT) proposition testing</li> <li>Passenger innovation in ticketing (carnets)</li> <li>c2c smartcard pilot evaluation</li> <li>Disabled passengers perspectives on smart ticketing</li> <li>Brighton &amp; Hove buses, smart managed service pilot</li> </ul> <p>Smart- Apps</p> <ul style="list-style-type: none"> <li>Future developments for Apps- to be published February 2015</li> </ul> <p>Smart - General</p> <ul style="list-style-type: none"> <li>Market study to look at overall use and attitudes to public transport, smart ticketing – including segmentation of passengers. will publish various short outputs through 2015</li> </ul>		IW

PM1.5	<b>ANNEX 1: ROAD USERS</b> <ul style="list-style-type: none"> <li>Understand user priorities</li> <li>Start satisfaction research</li> <li>Engage with stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Chairman's Advisory Group and the wider stakeholder advisory board have met twice</li> <li>'getting to know each other' sessions with the 5 members of Chairman's Advisory Group completed</li> <li>Further discussion with DfT on research programme content and timings</li> <li>AECOM ran initial workshop on initial qualitative research findings for Road User Team; stakeholder slide deck and report now in preparation</li> <li>Internal staff briefings</li> <li>Spec for Independent Analytical Review issued 16 December</li> <li>Met with HA Communications team 17 December</li> <li>Initial discussions with HA Manchester held on 14 January</li> <li>Priorities for improvement research brief issued</li> </ul>	<ul style="list-style-type: none"> <li>More stakeholder meetings planned</li> <li>Strategy for coverage of roads stakeholders in CRM being implemented, to be in place ahead of sending out communications in the new year</li> <li>Further discussions with HA Manchester on 29 January. Also arranging with Jane Phillips to widen our discussions with national and regional teams at the various bases around England, to expand understanding of their work and how user engagement can be more effective</li> </ul>	Industry resistance although this appears to be thawing as stakeholder engagement continues. Long road ahead nonetheless	IW
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## 2. Making a difference for all passengers through long-term planning

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PAX3	<b>Key objective</b> <ul style="list-style-type: none"> <li>Boost the passenger voice in rail franchising</li> </ul>	<ol style="list-style-type: none"> <li>General <ul style="list-style-type: none"> <li>Participated in IPPR Roundtable on Transport for the North - 18 Nov</li> <li>Research agency presented results of first tranche of 'Customer Reports' research (GTR) on 20 November and second tranche (c2c) on 14 January</li> <li>Presented a passenger perspective on stations at RDG Stations Summit on 3 December</li> <li>Presented 'Passenger perspectives on rail journeys', drawing on NRPS, Passenger Priorities and TOC specific research, to a conference on rolling stock maintenance on 10 December</li> <li>Held initial meeting with Marianna White new Head of Passenger Service Excellence to discuss her new role and begin scoping potential research into Passenger Charters</li> <li>First focus groups conducted on 21 and 22 Jan for the Extreme Weather project</li> </ul> </li> <li>Policy/strategy <ul style="list-style-type: none"> <li>Recorded clip on Passenger Priorities for Improvement for launch video for Rail Executive Passenger Services directorate</li> <li>Responded to Stuart White letter regarding our support for DfT franchise programme, NDA and budget. Subsequent meeting with Colin Westwood indicated our points were accepted</li> </ul> </li> <li>Individual franchise activity <p>Essex Thameside</p> <ul style="list-style-type: none"> <li>PIT/PT comments submitted on key documents PC/DPPP etc</li> <li>SH and LMcC met Head of Customer Experience to discuss ongoing relationship now franchise is operational</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>General <ul style="list-style-type: none"> <li>IW/SH meeting with consultants working on Department's Quality of Service project. Will be invited to workshop for stage 2 in New Year</li> </ul> </li> <li>Franchise strategy <ul style="list-style-type: none"> <li>Invoice for £166.6K sent to procurement team on 22/1/15. Should be paid shortly</li> <li>Awaiting PO for WM DA research, plus additional PO for £4k VAT on EM project</li> <li>Preliminary discussion indicates DfT expecting to fund franchising activity in 2015/16. Draft budget to be drawn up for discussion</li> </ul> </li> <li>Individual franchise activity <p>Essex Thameside</p> <ul style="list-style-type: none"> <li>Follow up with National Express Bid Director and c2c Managing Director on how to take forward joint working proposals agreed at the bid stage (in New Year)</li> <li>Invitation to present c2c Customer Report findings to Customer Strategy steering group on 4/2/15. Northern /TPE</li> <li>Discussions with DfT to understand and determine which aspirations sit in Franchise Agreement and which in ITT are ongoing</li> <li>Awaiting response from DfT on proposal for information that franchise agreements should set as a basic requirement for new contracts</li> <li>Publication of ITTs now scheduled for New Year. Will be looking for how they reflect our detailed input on</li> </ul> </li> </ol>		MH

		<p>East Coast</p> <ul style="list-style-type: none"> <li>DfT announced the conclusion of the competition for the InterCity East Coast franchise and its intention to award the franchise to Inter City Railways (a consortium of Stagecoach and Virgin). There will now be a period of handover to Passenger Team re ongoing relationship</li> </ul> <p>Northern/TransPennine Express (TPE)</p> <ul style="list-style-type: none"> <li>Commented on proposed NRPS targets and remedial expenditure requirements for Northern and TPE ITTs and continuing to discuss approach to sampling for stations</li> <li>Two meetings held with Arriva Northern bid team; an initial meeting for a wide ranging discussion on the significant issues for the new franchise to address, a further meeting involving both PIT and PT, to discuss customer service and complaints handling issues in more detail</li> <li>Met with Keolis TPE bid team for a wide ranging initial discussion on the significant issues for the new franchise to address</li> </ul> <p>East Anglia</p> <ul style="list-style-type: none"> <li>Research agency presented findings from qual research amongst passengers and non-users in East Anglia to PF and DfT on 15 December</li> <li>Met with Pascale Wilson, the recently appointed Specification Manager, to brief on our role and activities and discuss customer experience issues for franchise</li> <li>Met Transport Systems Catapult to discuss development of innovation and contribution to series of innovation workshops with stakeholders</li> <li>Attended a series of DfT public consultation events and presented highlights of our research and high level recommendations for the EA franchise</li> </ul> <p>Direct Awards (DA)</p> <p>East Midlands</p> <ul style="list-style-type: none"> <li>Focus groups to explore EMT' passenger's experiences and aspirations completed in December. Research agency presented findings to PF and DfT on 15 December</li> <li>Online exercise to gather EMT passenger feedback on behalf of DfT now closed. 325 people responded. Results were shared with DfT and EMT and published on our website in December</li> </ul> <p>West Midlands</p> <ul style="list-style-type: none"> <li>DfT commissioned qual research to explore passengers' experiences and aspirations - focus groups completed in December. Research agency presented findings of qual research on 23 January</li> <li>Held initial meeting with Richard Brooks, LM, in November and also met with Centro on 2 December to discuss their perspective on and aspirations for the DA</li> <li>Submitted 'Proposals for LM DA' document to DfT, drawing on our research and outlining our high level recommendations</li> </ul>	<p>passenger aspirations for service quality and customer experience elements of the franchise and the decision on audit regimes</p> <ul style="list-style-type: none"> <li>Progressing arrangements to meet bid teams</li> </ul> <p>East Anglia</p> <ul style="list-style-type: none"> <li>Regular meetings scheduled with DfT to discuss, amongst other things, consultation. We are currently drafting some initial input as well as preparing a response to the consultation document</li> <li>Planned involvement in TSC Innovation Workshops to be held in February and Bidders' Day to be held in March</li> <li>Completed EA research report due for publication in February</li> </ul> <p>Great Western</p> <ul style="list-style-type: none"> <li>Awaiting outcome of DfT / FGW discussions on RFP, including NRPS targets for DA2 in which we were extensively involved</li> </ul> <p>East Midlands</p> <ul style="list-style-type: none"> <li>Finalising EMT research report which is due for publication at the end of January</li> <li>Drafting proposals for the EMT DA which will be submitted to DfT and published at the end of January</li> </ul> <p>West Midlands</p> <ul style="list-style-type: none"> <li>Both LM research report and our proposals for the LM DA due to be published in February</li> </ul> <p>South West Trains</p> <ul style="list-style-type: none"> <li>Discussions continue regarding revised NRPS 'building blocks' on which customer satisfaction targets for the direct award period would be based</li> </ul> <p>ScotRail</p> <ul style="list-style-type: none"> <li>Reviewing key documents for new franchise including Passenger Charter and CCHP</li> </ul> <p>Franchise customer reports</p> <ul style="list-style-type: none"> <li>Report of research into passenger reactions to Customer Reports issued as a franchise commitment by Govia Thameslink Railway and c2c (includes report issued voluntarily by Abellio Greater Anglia) due to be published in February</li> </ul>		
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PM2.1	<b>RAIL</b> <ul style="list-style-type: none"> <li>• Provide passenger input to long-term planning processes</li> <li>• Monitor safety and political developments that may impact on passengers</li> <li>• Set up a passenger panel to advise on HS2</li> <li>• Encourage industry transparency</li> </ul>	<ul style="list-style-type: none"> <li>• Passenger Priority research – report published - well received</li> <li>• Attended RDG conference and met with Network Rail to discuss the ‘Digital Railway’ strategy; and attended Rail Industry Planning Group looking longer-term planning issues</li> <li>• HS2 panel <ul style="list-style-type: none"> <li>- 29 Nov HS2 workshop took place with panellist in Birmingham and went down really well</li> <li>- 8 Dec - IW and Andrew McNaughton (HS2) presented at the High Speed Conference in Birmingham</li> <li>- Have also accepted to speak at the SmartRail Europe conference in Amsterdam in May 20 15</li> <li>- Met with HS2 on 8 Jan to discuss publication of the panels output for the first year</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Research to be commissioned looking at passengers attitudes to punctuality - this is designed to feed into the debate about targets for the next control period/HLOS</li> </ul>		MH
PM2.3	<b>BUS</b> <ul style="list-style-type: none"> <li>• Work with authorities on local schemes designed to improve services, for example: <ul style="list-style-type: none"> <li>o Better Bus Areas</li> <li>o Quality contracts</li> </ul> </li> <li>• Work with operators and authorities in three target areas to understand non-users and identify proposals to encourage greater use of bus services</li> <li>• Changes to bus services: <ul style="list-style-type: none"> <li>o Improve passenger consultation and information</li> <li>o Refresh tool kit</li> <li>o Examine the process for adding/removing services</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Demand Responsive Transport / Community Transport</b> – We have identified at least three areas that would be willing to assist and have interesting schemes in place. A final decision about which areas we will work with will be made in February 2015. A research agency has been commissioned and the work should be underway by March 2015 and we aim to publish findings in the summer 2015</li> </ul>	<ul style="list-style-type: none"> <li>• Nexus has decided to pursue Quality Contract approach</li> <li>• Prepare report on driver training. Fieldwork/visits complete - report being drafted</li> <li>• Produce specification for project looking at level of communication when adding/removing bus services from the timetable</li> </ul>		MH

### 3. Working to improve the passenger experience

Ref/Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PAX4	<b>Key objective</b> <ul style="list-style-type: none"> <li>• Use our Bus Punctuality Project to refocus the bus industry, local government and Traffic Commissioners</li> </ul>	<ul style="list-style-type: none"> <li>• Responded to second Senior Traffic Commissioner consultation on punctuality guidance ( 19 May 2014)</li> <li>• Responded to triennial review of Senior Traffic Commissioner role (30 January 2015)</li> <li>• Responded to Senior Traffic Commissioner’s final observations on the further revision of draft guidance on bus punctuality 29 January 2015)</li> <li>• Final report on Bus Punctuality Project published December 2014</li> </ul>	<ul style="list-style-type: none"> <li>• Road shows to be considered as part of next year’s work plan</li> </ul>	<ul style="list-style-type: none"> <li>• Delays to publication of final Senior Traffic Commissioner Punctuality guidance. Decoupling promotion of our work from traffic commissioner guidance would reduce the draw of the workshops for target audience</li> </ul>	MH
PAX5	<b>Key objective</b> <ul style="list-style-type: none"> <li>• Make sure that rail passengers who have made an innocent mistake are not treated as criminals</li> </ul>	<ul style="list-style-type: none"> <li>• Continued to take up individual passenger appeal cases to build up our body of evidence. Some wins for individual passengers</li> <li>• Update on Ticket to Ride published - 3 Feb. DfT also published consultation on Penalty Fares that addresses several of our key concerns. Good media coverage achieved</li> </ul>	<ul style="list-style-type: none"> <li>• Respond to DfT consultation on Penalty Fares</li> <li>• Follow up publication to ticket to ride 2</li> </ul>	<ul style="list-style-type: none"> <li>• Changing byelaws about strict liability requires legislative change</li> </ul>	MH

3.1.1	<b>RAIL - Disruption</b> <ul style="list-style-type: none"> <li>Help industry understand the passenger perspective on disruption</li> <li>Reduce impact on passengers during disruption</li> <li>Look into passenger attitudes to punctuality</li> </ul>	<ul style="list-style-type: none"> <li>Passenger Information During Disruption (PIDDD) research published September</li> <li>Report, 'Passenger Information Screens at railway stations' published in November</li> <li>ATW signal problems in July. Report submitted on their actions taken and information provided</li> <li>Initial and Final Reports submitted regarding the Christmas engineering overrun at Kings Cross and Paddington. Significant media engagement and follow up meetings. Evidence submitted to ORR as part of its review</li> </ul>	<ul style="list-style-type: none"> <li>Research on attitudes to punctuality/performance. Discussions with ORR. Will also include update of comparison between reported delays in NRPS and actual delays as recorded by the industry. Agency briefings pending</li> <li>Agreement for joint work – part funded by us and Network Rail – on research into passenger attitudes towards severe weather. Fieldwork now being analyzed</li> <li>Agreement for joint work – part funded by us and Network Rail – on research into how suicides on the railway are communicated to passengers. Research in field</li> </ul>		MH
3.1.2	<b>RAIL - Retailing/fares</b> <ul style="list-style-type: none"> <li>Follow up the conclusions from the DfT's 'Fares and ticketing review</li> <li>Improve ticket retailing, including smartcards</li> <li>Work with ORR on its proposed ticket information code of practice</li> </ul>	<ul style="list-style-type: none"> <li>ORR Market Study: addressed seminar (giving passenger perspective on effectiveness of the retail market) giving the passenger perspective on retailing) and submitted formal response</li> <li>Raised concerns about Northern Rail's evening peak fare increase</li> <li>Responded to ORR's formal consultation on Code Practice for Ticket information</li> <li>Media work surrounding January fares increase</li> <li>Presented at Ministerial level summit on ticket vending machines - allowed us to demonstrate many of the of the problems faced by passengers</li> </ul>			MH
3.1.3	<b>RAIL – Passenger rights</b> <ul style="list-style-type: none"> <li>Increase passenger/consumer rights awareness</li> <li>Look into the suitability of compensation regimes for season ticket holders who endure persistent delays</li> <li>Encourage greater transparency of performance data</li> </ul>	<b>Consumer Rights</b> <ul style="list-style-type: none"> <li>Continued to contribute to discussions with ORR and other key stakeholders on the new rail complaints handling guidance (CHP) for train operators</li> <li>Provided written feedback on 28 Jan 15 to ORR on their draft CHP guidance for pre-consultation</li> <li>Changes in the approach towards ADR for the rail industry mean that this has gone on ice for Passenger Focus. We will maintain a watching brief, pending review of the ADR scheme towards the end of 2015</li> <li>Responded to DfT consultation on implementation of Passenger Rights Obligation (PRO)</li> </ul>	<ul style="list-style-type: none"> <li>Monitor progress of Consumer Rights Bill and identify opportunities</li> <li>Proposed review of National Rail Conditions of Carriage (Autumn) - still waiting</li> </ul>		MH
3.1.4	<b>RAIL –Improved scores for TOCs through National Rail Passenger Survey results</b> <ul style="list-style-type: none"> <li>TOCs value the results and see them as an important measure of their success and their customers' feedback on areas to improve</li> <li>TOCs with the lowest scores commit to an action plan to improve</li> </ul>		<p>Undertaking regular meetings with FGW management to discuss passenger experience issues and performance. Briefed FGW senior management team on initial feedback and Trust research on 04/11/14 Setting up meeting with FGW to discuss autumn 2014 NRPS results and subsequent action plan</p> <p>Presenting and discussing NRPS results with Senior Customer Service staff at SET</p> <p>Series of meetings with key staff at GTR to monitor and discuss performance and action plans for improvement Meeting arranged with Southern MD to discuss their recent poor performance</p> <p>Setting up Autumn 2014 presentations to AGA, GTR and LM</p> <p>Initial discussion held with Southern around NRPS targets and likely penalties. Meeting being arranged to discuss the results</p>	Sufficient time to dedicate attention to a number of TOCs who require our dedicated assistance during a busy period	DS



			and action plan to use penalty funds against NRPS priority. Meeting will be with DfT and Southern		
3.2.1	<b>BUS</b> <ul style="list-style-type: none"> <li>Improve passenger experiences of disruption.</li> <li>Use existing research “<i>Bus passenger views on value for money</i>” to bring retail improvements</li> </ul> Maintain our work on smartcard developments Increase our bus profile <ul style="list-style-type: none"> <li>Greater understanding of our role</li> <li>Increased profile in the more local bus industry</li> </ul>	<ul style="list-style-type: none"> <li>Took recent opportunity to brief several bus operators and local transport authorities, as part of BPS follow-up work, about our full range of bus policy, research and advocacy work</li> <li>Member of DfT working group on reform of Bus Service Operators’ Grant (BSOG). Contributed passenger research evidence into discussions to part of BSOG incentivising service quality improvements. Quality elements now compiled into matrix for forthcoming consultation</li> </ul>	<ul style="list-style-type: none"> <li>Scope potential research on bus registration – 56 day notice</li> </ul> Smart-Bus <ul style="list-style-type: none"> <li>Norfolk Managed Service pilot – ongoing work. Pre-introduction research completed with passengers, operators and stakeholders. Second stage underway – should be published in 2015</li> </ul> Bus Service Operators’ Grant <ul style="list-style-type: none"> <li>Respond to service quality elements matrix with further refinements and prepare for consultation submission</li> </ul>		DS
3.2.2	Improved scores for operators through Bus Passenger Survey results <ul style="list-style-type: none"> <li>Bus industry and local authorities value the results and see them as an important measure of their success and their customers’ feedback on areas to improve</li> <li>Operators with the lowest scores commit to an action plan to improve</li> <li>More operators want to be included in the BPS</li> </ul>	<ul style="list-style-type: none"> <li>Emerging headlines from improvement plans showing focus on driver behaviour, punctuality, passenger information through apps and websites and ticketing initiatives for young people</li> <li>First Group used BPS results to drive new customer care programme across their businesses including presentation of results and key themes at two conferences in July for all senior management</li> <li>BPS stakeholder reviews undertaken, consulting 26 stakeholders. Report produced with findings and recommendations for future stakeholder contact work</li> <li>Planned how to use Passenger team experience and strength to take out BPS results in spring 2015, to enable us to meet a total of 92 authorities and operators</li> </ul>	<ul style="list-style-type: none"> <li>Small number of follow-up meetings to complete with bus operators/transport authorities on 2013-14 BPS action plans including the Centro-led partnerships in Birmingham and Coventry</li> <li>BPS team (research + passenger team) meeting to plan implementation of stakeholder review findings and recommendations</li> <li>Further planning for taking out BPS in spring 2015 to refine prospective presentation content and provide support across the team for effective discussions</li> </ul>	<ul style="list-style-type: none"> <li>Sufficient time to a number dedicate attention to specific operators and authorities</li> </ul>	DS
3.3	<b>ALL MODES - Make a difference locally</b> <ul style="list-style-type: none"> <li>passenger groups are empowered to work directly with operators and deliver local improvements for passengers</li> </ul>	<ul style="list-style-type: none"> <li>Exchange newsletter is sent to 1000 subscribers around once a month to maintain engagement</li> <li>Draft strategy for future user group engagement produced, with options for more effective engagement through mix of work streams to support discussions on actions for 2015 Workplan</li> </ul>	<ul style="list-style-type: none"> <li>Final editing of draft strategy for user group engagement, including highlighting recommended actions for 2015</li> </ul>	<ul style="list-style-type: none"> <li>Engaging sufficient interest/numbers from groups in some regions and meeting groups’ expectations of holding useful events</li> </ul>	DS

#### 4. Promoting good practice in complaints handling and providing advice and advocacy

PAX6	<b>Key objective</b> <ul style="list-style-type: none"> <li>Deal with some 3,000 rail ‘appeal’ complaints where companies and passengers are deadlocked. We will achieve over 70% satisfaction with the way we handle complaints</li> </ul>	<ul style="list-style-type: none"> <li>Achieved 76% overall passenger satisfaction with our service year to date (April to December 2014)</li> <li>Resolved 153 passenger appeals in December with an average resolution of 20 working days</li> <li>From April to December we received 2383 appeals and resolved 1925. In addition, 347 appeals were not pursued by the passenger, and we chose not to pursue 94 cases</li> <li>As at 28 January 2015, the top three operators generating passenger complaint appeals are Northern Rail, East Coast and First Great Western</li> <li>For the appeals we resolved in December 2014, the top comments raised by passengers were about complaints handling, fares, retailing and refunds and train service performance.</li> </ul>			

PM4.1	<b>RAIL</b> <ul style="list-style-type: none"> <li>Handle 25,000 enquiries from passengers, intervene in 6,000 issues raised from complaints</li> <li>Engage proactively with TOCs to help improve first time complaint resolution</li> <li>Carry out in depth complaints reviews with up to four train companies</li> <li>Ensure the results of these reviews are understood and are acted upon</li> <li>Release complaints handling data</li> </ul>	<ul style="list-style-type: none"> <li>Conducted a follow up complaint handling review and will provide findings to the TOC in the New Year</li> <li>Worked with our contact centre to successfully improve performance for calls answered in 20 seconds, now at 85% year to date at end December 2014, against a target of 85%.</li> <li>Q3 data for resolved complaint appeals published in the online data explorer</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled a further follow up complaint review with another two train companies in Q4</li> <li>Q3 data for resolved complaint appeals will be published in the online data explorer in January</li> </ul>		
PM4.2	<b>BUS</b> <ul style="list-style-type: none"> <li>Work to increase the extent and awareness of bus passenger rights</li> <li>Develop and launch BPS data through a new open data tool on our website</li> </ul>	<ul style="list-style-type: none"> <li>Raised issues regarding bus passenger rights through the passage of the Consumer Rights Bill</li> </ul>	<ul style="list-style-type: none"> <li>Development of the BPS online data explorer nearing completion. Will be ready in time for the publication of the Autumn 2014 wave of BPS</li> </ul>		

## 5. Improving access to services for all passengers

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PM5.1	<b>ALL MODES</b> <ul style="list-style-type: none"> <li>Follow up the rail “<i>Passenger Assist</i>” research</li> <li>Hold two meetings of the accessibility forum each year</li> <li>analyse NRPS and BPS to assess the views of those with disabilities</li> <li>Ensure that the views of those with disabilities are captured in our research projects</li> <li>Comment on and seek to improve operators’ proposed Disabled People’s Protection Policies</li> <li>Keep abreast of future technology to ensure we are knowledgeable and can react if needed</li> </ul>	<ul style="list-style-type: none"> <li>Accessibility Forum - New date is 29 April 2015 and invitations have been sent out</li> <li>Meetings with further TOCs to discuss their performance on Passenger Assist research. Additional meetings now held with Northern and Southern to discuss implementation plans</li> <li>Presented results of Passenger Assist research to ATOC Accessibility Forum and National Rail Accessibility Forum (11 March and 6 May)</li> <li>Passenger Focus has attended the inaugural meeting of the ATOC working party for improving the delivery of Pax Assist</li> <li>Passenger Focus asked to join ORR working group to help identify the data that should be collected for monitoring DPPP’s</li> <li>Passenger Focus invited to join government-sponsored working group looking at dementia-friendly transport</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing meetings with other TOCs to discuss Passenger Assist research</li> <li>Revised DPPP documents submitted for comment by Abellio Greater Anglia. Comments also in hand for Thameslink Southern Great Northern and Essex Thameside franchises</li> </ul>		MH

## 6. Increasing the influence of Passenger Focus through building trust in our work

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PM 6.1	<b>COMMUNICATE</b> <ul style="list-style-type: none"> <li>Maintain an easy to use website - seek and publish feedback</li> <li>Publish a monthly newsletter</li> <li>Maintain a 24 hour press office</li> <li>Increase awareness of our publications</li> </ul>	<ul style="list-style-type: none"> <li>960 media mentions until 24 September</li> <li>Passenger Voice published each month</li> <li>Produced 27 CEO blogs</li> <li>Published Merseyrail rolling stock research</li> <li>Published NRPS Spring wave</li> <li>Published three reports in conjunction with Scotland visit:</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder strategy currently under review</li> </ul>		HP



	<ul style="list-style-type: none"> <li>• Increase access to and usefulness of our research data</li> <li>• Publish proceedings and decisions of our Board and management team on our website</li> </ul>	<ul style="list-style-type: none"> <li>- Transport integration in Scotland</li> <li>- Passenger Priorities – Scottish cut</li> <li>- Waverley Station</li> <li>• Published the passenger trust/confidence research and arranged briefing sessions for journalists</li> <li>• Published Passenger Information During Disruption research report</li> <li>• Published Information Screens research report</li> <li>• Produced and ensured the tabling of the Annual Report 2013-14</li> <li>• Responded to the DfT’s announcement about the extension of our remit</li> <li>• Responded to the July inflation figures and their implications for rail fares and the Chancellor’s subsequent announcement</li> <li>• Responded to request to provide advice on the Consumer Rights Bill to the Opposition frontbench</li> <li>• Paper on Trust research accepted for 2015 Market Research Conference</li> </ul>			
PM6.2	<b>TRACK</b> <ul style="list-style-type: none"> <li>• Number of passengers we engage with through consultation, research and our contact team</li> <li>• Stakeholders we have influenced</li> <li>• Staff attitudes through an annual survey</li> <li>• stakeholder views through a survey</li> </ul>	<ul style="list-style-type: none"> <li>• 34% of passengers contacted after resolving their complaint appeal case, have responded to our passenger satisfaction survey this year (April to November)</li> <li>• 149,710 emails delivered between April and November through our external marketing tool; 92,311 emails opened; 27,610 clicks</li> </ul>			DS
PM6.3	<b>REPORT</b> <ul style="list-style-type: none"> <li>• four times a year in public at regional board meetings</li> <li>• audit committee reports to the board</li> <li>• monthly performance and financial reports</li> <li>• annual published report on performance, activity and expenditure</li> <li>• examine other ways to gather and report our effectiveness</li> <li>• update our online data tool each quarter</li> </ul>	<ul style="list-style-type: none"> <li>• Q1 board meeting in London in September 2014</li> <li>• Annual report and accounts endorsed</li> <li>• Workplan report to board endorsed</li> <li>• Online data tool updated with latest complaint appeal data for period October - December 2014 and data made available to download as “Open Data”</li> <li>• Autumn 2014 National Rail Passenger Survey data added to the data explorer on the day of publication</li> </ul>			JC

## 7. Raising the awareness and impact of our work in Scotland and Wales

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
PM7.1	<b>SCOTLAND</b> <ul style="list-style-type: none"> <li>• continue to carry out NRPS on ScotRail and cross border services and use results to drive change</li> <li>• explore possible further BPS and TPS in Scotland</li> <li>• look at research into barriers to integrated transport</li> <li>• ensure plans are in place and used to handle increased passenger journey and retain standards during Commonwealth Games</li> <li>• ensure research has Scottish element</li> </ul>	<ul style="list-style-type: none"> <li>• HITRANS wish to redevelop Inverness station. Part of redevelopment plans to ascertain priorities of passengers at station by funding Passenger Focus to undertake survey</li> <li>• Research on Glasgow Queen Street redevelopment complete - funded by TS/operator. Findings presented on 19 January in Glasgow</li> <li>• Research brief complete for research with Caledonian MacBrayne on ferry passenger survey - funded by Caledonian MacBrayne</li> <li>• Serco have held meeting with Research Team (Caledonian Sleeper franchise) to discuss bespoke NRPS for Sleeper services. Looking at options to progress</li> <li>• Abellio (new ScotRail franchise) wish to fund Passenger Focus to undertake two additional waves of NRPS each year</li> </ul>	<ul style="list-style-type: none"> <li>• Meetings arranged with Transport Scotland and bus operators to report on Autumn 2014 BPS. Meetings taking place in February/March</li> <li>• Ongoing discussions with both Abellio and Serco regarding Passenger Charter, DPPP and CHP</li> <li>• Research brief to be agreed and finalised with HITRANS</li> <li>• Winter resilience focus groups taking place in Scotland</li> <li>• Ongoing participation in Glasgow Queen Street redevelopment as part of Glasgow Queen Street Area Passenger Forum</li> <li>• Meeting to be arranged regarding Autumn 2014 TPS in Edinburgh</li> </ul>	<ul style="list-style-type: none"> <li>• Research Team capability to meet and agree additional NRPS within time framework that Abellio wish to achieve</li> <li>• Scope of research with Caledonian MacBrayne has altered/increased which may make the survey unmanageable as a single survey</li> </ul>	DS

<p>PM7.2</p>	<p><b>WALES</b></p> <ul style="list-style-type: none"> <li>• continue carrying out NRPS on Arriva Trains Wales and cross border services and use results to drive change</li> <li>• Explore possibility of BPS being carried out in Wales</li> <li>• Ensure majority of rail research projects have a distinct Welsh element where relevant</li> <li>• Take active role in Passenger Advisory Panel set up by Welsh Assembly</li> </ul>	<ul style="list-style-type: none"> <li>• Key stakeholder meetings; DfT/Welsh Gov cross border rail forum, Network Rail/BTP community safety, ATW complaint-handling review</li> <li>• Member of Welsh Government working group on SE Wales smart ticketing. Shared smart ticketing research with the group and putting the case for building around passenger priorities. Also provided and discussed wealth of passenger research with Welsh Government consultants around shaping future smart ticket developments</li> <li>• Continued input to British Transport Police/Authority about their target to improve public confidence by 10%. Using NRPS, passenger priorities and other research as a discussion basis for recommending actions for contacting police and reporting passenger concerns</li> <li>• New Public Transport Users' Advisory Panel has met, breadth of our research and specific examples of NRPS/priorities tabled and well received at first meeting. Good opportunities to build on this foundation in the future</li> <li>• Met ATW senior team on 21 January for their in-depth report on wide-ranging actions taken following our recommendations about serious disruption in July 2014</li> </ul>	<ul style="list-style-type: none"> <li>• Continue input to Public Transport Users' Advisory Panel, find opportunity to present our research in more detail at an early future meeting</li> <li>• Continue input to Welsh Gov smart ticketing group, including writing to raise concerns over apparent lack of passenger consultation and extremely short timescales</li> <li>• Continue discussions with BTP and Authority on initiatives to support achieving target to improve public confidence by 10%</li> <li>• Winter resilience research to include Wales</li> <li>• National Transport Plan has been released for consultation - closing mid-March 2015. Review content and compile submission with evidence from our research with Welsh passengers</li> <li>• Write to Welsh Government offering support and benefit of our research and seek closer working on Wales and Borders rail franchise, which changes in 2018; following announcements of: <ul style="list-style-type: none"> <li>• transfer of franchise ownership to Welsh Government</li> <li>• funding for S.Wales main line and Valleys electrification</li> <li>• forming of social enterprise company to advise and work towards setting up the new rail franchise</li> </ul> </li> <li>• Continue dialogue with ATW about implementation of improvements following NRPS results and actions on handling disruption</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of political support at Welsh Government level to fund another national BPS study</li> <li>• Transport responsibility shifted from four consortia to 22 local authorities in April; task now to establish relations with emerging stakeholder authorities. Opportunities through responding to local transport plan consultations with our passenger research evidence</li> <li>• Advisory Panel has now met, but need to keep momentum to ensure we have a continuing channel for communicating passenger priorities in Wales</li> <li>• Need to strengthen our approach to Welsh Government to ensure passenger voice and priorities are at the heart of the new rail franchise process, specification and operation</li> </ul>	<p>DS</p>
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