




# 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:


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= 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>Stakeholder and technical review of the Bus Passenger Survey completed</li> <li>Passenger Team and Murray Leader completed boost fund arrangements. Autumn 2014 wave survey size expected to be c.45,000 including pan- Scotland survey and the move of Go Ahead fieldwork from Spring to Autumn confirmed</li> <li>Centro spring 2014 wave publication</li> <li>Go Ahead spring 2014 wave publication</li> </ul>	<ul style="list-style-type: none"> <li>Autumn 2014 wave in field</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>	<ul style="list-style-type: none"> <li>Published</li> <li>Very positive briefing event in Manchester</li> </ul>			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>Spring 2014 NRPS published on 25 June 2014</li> <li>Published Future Merseyrail rolling stock – what passengers want</li> <li>Published Passenger Experience</li> <li>Published Trust (Passengers' relationship with the rail industry)</li> <li>Presentation on NRPS to Rail Executive Board at DfT – much interest and discussion</li> <li>Stakeholder and technical review of the NRPS completed</li> </ul>	<ul style="list-style-type: none"> <li>The Autumn 2014 NRPS fieldwork starts on 1 September 2014 and continues up to 9 November 2014</li> <li>Boost of 12 Community Rail Partnership lines in Autumn NRPS</li> <li>Potential to embed Trust work further with industry via round of workshops</li> </ul>	<ul style="list-style-type: none"> <li>Retendering starts this year</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>Successful publication event on the first TPS results took place on 7 April 2014 with 30 external participants (mainly operators and authorities)</li> <li>Undertaken a series of meetings with the industry to discuss the results</li> <li>Press release gave rise to 7 media mentions</li> <li>BDRC re-appointed for next wave of TPS</li> <li>Paul Rowen talked about TPS at latest APPLRG with Keith Bailey in support</li> </ul>	<ul style="list-style-type: none"> <li>TfGM, Centro and Blackpool continuing their co-funding (SYLTE and NET declined). Edinburgh Tram are also funding their inclusion in this wave</li> <li>TPS Wave 2 now in field</li> </ul>	<ul style="list-style-type: none"> <li>Croydon would be excellent addition but TfL not prepared to fund TPS in addition to their own surveys</li> <li>SYLTE unable to fund Sheffield</li> <li>NET regard their own survey (mandated under franchise) as better value for money</li> <li>year to year funding inefficient and may appear insecure from boost funders perspective</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</li> </ul>		<ul style="list-style-type: none"> <li>Coach Passenger Panel meeting has been arranged for 11 Dec 2014</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

	plan to improve scores				
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 Smarter Ticketing programme</li> </ul>	<ul style="list-style-type: none"> <li>TPS report provided model for cross modal</li> <li>Large number of Smart projects underway</li> <li>Ministerial briefing on Smart research 26 August</li> <li>Key role in Transport Card Forum (DfT funded body ) conference in September very positive response. Spoke at CEE Transport Ticketing conference</li> <li>Started project researching PlusBus</li> </ul>	<ul style="list-style-type: none"> <li>Also agreeing dissemination to local authorities with DfT.</li> <li>Use of Contactless cards for rail travel (Chiltern pilot) - to be published 2014</li> <li>South East Flexible Ticketing on Rail (SEFT) proposition &amp; branding testing - to be published 2014</li> <li>Passenger innovation in ticketing - to be published 2014</li> <li>Advance on the Day tickets – Cross Country pilot - to be published 2014. Second wave planned</li> <li>Invited to Advisory Board of Transport Ticketing 2015, Knowledge Partner status, speaking slot</li> <li>Invited to join TCF Steering Group</li> <li>Norfolk Wave 2 underway - to be reported alongside W1 before Christmas</li> </ul> <p>Smart- Apps</p> <ul style="list-style-type: none"> <li>New project to understand and test future developments for Apps- to be published 2014</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. First done in 2013 - being updated and to be published 2014</li> </ul> <p>Specific work to understand disabled passengers' needs from smart &amp; integrated ticketing – in discussions. Initial meeting held with DPTAC June 2014 and in planning now</p>		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 met for second time and the wider stakeholder advisory board met for the first time</li> <li>A round of meetings with other stakeholders to discuss research programme and other issues including a 'getting to know each other' session with RAC Foundation</li> <li>Further discussion with DfT on research programme content and timings</li> <li>Appointed AECOM for initial qualitative research</li> <li>Internal staff briefings</li> <li>Jane Phillips (HA) has agreed to become main conduit for sharing knowledge and ideas with ourselves. Regular meetings planned</li> </ul>	<ul style="list-style-type: none"> <li>More stakeholder meetings planned</li> <li>Qualitative road user research kicks off in Manchester 20th October</li> <li>Spec for Independent Analytical Review almost agreed</li> </ul>	Industry resistance although this appears to be thawing as stakeholder engagement continues. Long road ahead nonetheless	IW

## 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>DfT provided additional resource for franchise work in 2014-15 (staffing and research). Bidding groups continue to seek our views and input as proposals developed for various franchises</li> <li>Briefed London TravelWatch on our approach to input to franchise specification and discussed their forthcoming work with TfL on London Overground (LOROL)</li> <li>Spoke at 'UK Rail Industry Forum 2014' on 11 September about passenger aspirations</li> <li>Agency appointed and briefed to conduct planned research into 'Customer Reports', funded from allocated DfT budget. Focus groups arranged and discussion guide developed</li> <li>DfT internal audit of franchise activity completed. Report outcome 'substantial' i.e. 'the framework of governance, risk management and control is adequate and effective'. No detailed corrective actions were identified.</li> <li>Attended a London Bridge briefing on 25 September re lessons learnt from the August blockade and looking ahead to the December timetable updates</li> </ul> </li> <li>Policy/strategy <ul style="list-style-type: none"> <li>DfT has confirmed policy setting out how NRPS targets will be used in future franchises</li> <li>Presentations on encouraging user group input to franchise consultations at conferences in London and Manchester. Well-received and stimulated debate</li> <li>Met with DfT teams for the ET/TSGN franchises to review our input to bid review process</li> <li>Met with Peter Wilkinson (Director of franchising, DfT) to discuss the franchise programme and strategy</li> <li>Met with Stuart White, (Deputy Director Rail Service Delivery, DfT), to discuss franchise policy and next steps and update him on our current work</li> </ul> </li> <li>Individual franchise activity <p>Essex Thameside (ET)</p> <ul style="list-style-type: none"> <li>Host of passenger benefits announced in the winning National Express bid for Essex Thameside</li> <li>Discussions held regarding content of the initial Customer Report to be published at start of franchise</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>General <ul style="list-style-type: none"> <li>Research brief to be developed re 'Winter Resilience', funded from allocated DfT budget</li> <li>First focus group for research into 'Customer Reports' to be held on 16 October</li> <li>Franchise specific pages on website under development. Text provided and now being progressed by communication team.</li> <li>IW/SH meeting with consultants working on Department's Quality of Service project</li> </ul> </li> <li>Franchise strategy <ul style="list-style-type: none"> <li>Meeting of Franchise Task Force to be held on 16 October</li> </ul> </li> <li>Individual franchise activity <p>Northern /TPE</p> <ul style="list-style-type: none"> <li>Detailed discussions about passenger aspirations for service quality and customer experience elements of the franchise. This includes potential audit regimes for the franchise</li> <li>Discussions with DfT to understand and determine which aspirations sit in Franchise Agreement and which in ITT are ongoing</li> </ul> <p>Essex Thameside</p> <ul style="list-style-type: none"> <li>National Express to present at members meeting in October</li> </ul> <p>Direct Awards (DAs)</p> <ul style="list-style-type: none"> <li>Develop approach to the East and West Midlands DAs.</li> </ul> <p>Great Western</p> <ul style="list-style-type: none"> <li>Continued discussions with GW/DfT over targets for NRPS for DA2</li> <li>Meeting DfT on 29 October re EMT DA.</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>Volume of activity on franchising and availability of resources. Unclear whether we can roll franchise funds into next year and what additional resource may be available for subsequent years. We have advertised the new post as a one-year fixed-term contract</li> <li>The new role in reviewing elements of franchise bids creates risks as well as opportunities. Requirements to maintain confidentiality and reputation. Tension between DfT desire for more nuanced bid review reports and view that Passenger Focus should take more cautious and highly factual approach to the input provided</li> <li>Need to determine extent of Passenger Focus input to Crossrail franchise and future role/funding for NRPS</li> </ol>	MH

		<p>Thameslink Southern Great Northern (TSGN) – to operate as Govia Thameslink Railway (GTR)</p> <ul style="list-style-type: none"> <li>Govia attended Members Event on 17 July to discuss plans for TSGN and Passenger Focus is presenting at the four stakeholder events they have arranged.</li> <li>Discussions held regarding content of the initial Customer Report to be published at start of franchise</li> <li>Provided comments on passenger charter, complaint handling procedure and penalty fare scheme</li> <li>Govia Thameslink Railway commenced operation on 14 September. Attended launch event on 15 September</li> </ul> <p>East Coast</p> <ul style="list-style-type: none"> <li>Bid review reports for East Coast franchise submitted to DfT</li> </ul> <p>Northern/TransPennine Express (TPE)</p> <ul style="list-style-type: none"> <li>Well-received presentations on passenger aspirations at DfT hosted Bidders’ Days for Northern and TPE franchises in May</li> <li>Presentations on passenger aspirations at DfT consultation events in Edinburgh, Preston and York. Presentation at ‘The Connected North’ conference on 11 July</li> <li>Ongoing involvement in Service Quality working groups for Northern and TPE franchises. These are looking at the use of passenger satisfaction targets. NRPS target factors now agreed for both franchises and discussions continue on sample size</li> <li>Response to Northern/TPE consultation submitted</li> <li>Constructive meeting with David Brown, Merseytravel, regarding Rail North developments and issues for Northern/TPE franchises</li> </ul> <ul style="list-style-type: none"> <li>Attended and facilitated breakout groups at workshop to identify and prioritise possible socio-economic outcomes and criteria for the DfTs Invitation To Tender for North of England’s rail franchisees</li> <li>Met with Arriva for a preliminary meeting to discuss our research and their bid</li> <li>Useful meeting with DfT to discuss which aspirations can be included as ‘core requirements’ in the Franchise Agreement and which might sit better in ITT</li> </ul>	<p>Govia Thameslink Railway</p> <ul style="list-style-type: none"> <li>Passenger Team arranged series of meetings with key GTR staff set up as part of our relationship with the new franchise to discuss passenger improvements and priorities</li> <li>Qualitative research being undertaken to assess passenger reaction to GTR (also c2c) Customer Reports published as part of franchise commitment</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 will be reviewing and commenting on the draft consultation document</li> <li>Sharing details of consultation events in our newsletters</li> <li>First focus group for qualitative research on 23 October</li> </ul>		
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		<p>Great Western</p> <ul style="list-style-type: none"><li>• Great Western specification consultation response submitted 26 June</li><li>• Presentation setting out passenger aspirations at TravelWatch South West convened consultation event on 6 June and at a similar DfT event on 17 June</li><li>• Nina Howe, Passenger Manager for Great Western has commenced work in post funded by FGW as part of Direct Award agreement. Discussions underway about arrangements for second Direct Award.</li><li>• Agreed provisional NRPS target factors for Direct Award 2 and provided input on, and encouraged DfT to set challenging but realistic targets</li><li>• Met key personnel on 23 September to discuss expectations for DA2.</li><li>• Met FGW Head of Research on 30 September to discuss research options. Agreed a firm shortlist of options for DA1 and preferred ideas for DA2. Proposals to be taken forward by Nina Howe and Keith Bailey</li><li>• Met FGW bid manager and customer relations manager to discuss our aspirations for their Passenger Charter for DA2</li></ul> <p>East Anglia</p> <ul style="list-style-type: none"><li>• Attended Norwich in Ninety stakeholder briefing and made short presentation on passenger perspective/NRPS</li><li>• Held positive initial discussions with DfT regarding our input to the award and productive second meeting with DfT Project Director and other franchise team members on 9 September</li><li>• Attended meeting to input into discussion on future rolling stock development</li><li>• Attended further meeting with DfT for programme update and to discuss planned consultation/our input.</li><li>• Agency appointed and briefed to conduct planned research into passengers' current experiences and their aspirations for the new franchise</li><li>• Provided content for inclusion in EA prospectus</li></ul> <p>Direct Awards (DA)</p> <ul style="list-style-type: none"><li>• Plans announced for Northern and Greater Anglia which deliver passenger benefits and reflect our input</li><li>• Discussions opened with SWT and DfT, and paper submitted, regarding early Direct Award</li><li>• Discussed outcome of the Virgin West Coast Direct Award and inclusion of NRPS targets with DfT and how this will lay foundations for the next 'full' franchise competition</li></ul>			
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		<ul style="list-style-type: none"> <li>• Provided input on new Passenger's Charter for Southeastern Direct Award, with many comments accepted for inclusion</li> <li>• Held initial meeting with DfT Lead Negotiator regarding next direct awards for London Midland and East Midlands Trains. Established process for Passenger Focus input, including NRPS target regime</li> <li>• Attended Southeastern direct award briefing event</li> <li>• Held initial meeting with DfT to discuss plans for SWT DA</li> </ul>			
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>• HS2 panel <ul style="list-style-type: none"> <li>- (29 March Introductory workshop with 40 panel members</li> <li>- Panel kicked off from 1 April 2014 and will run for one year</li> <li>- 24 April (held the ideas refinement day with agency and HS2)</li> <li>- feedback from agency on online community – July, September</li> <li>- Accepted to speak about at two conferences</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Continue series of meetings with Network Rail and ORR on passenger engagement in major projects</li> <li>• Attend Rail Industry Planning Group (RIPG) looking at longer-term planning issues</li> <li>• There will several sessions with HS2 Ltd. to disseminate panel findings more widely within the organisation</li> <li>• A second workshop with whole panel being planned at HS2 request and cost</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>• Submission to NEXUS on Quality Contract Scheme (QCS)</li> <li>• Series of exploratory meetings with the bus industry regarding driver training- part of wider piece of work looking at the importance of bus driver behaviour/attitudes</li> </ul>	<ul style="list-style-type: none"> <li>• Awaiting decision from NEXUS on whether it will pursue a Quality Contract Scheme</li> <li>• Prepare report on driver training. Fieldwork/visits 80% complete. Report due quarter 3</li> <li>• Work planning in progress for refreshing toolkit and improving passenger consultation. Project widened to include a look at alternatives to bus services (i.e. community transport/demand responsive transport). Project request (including funds for research on demand responsive) approved in July</li> <li>• Contact with two prospective areas to engage in more detailed research. We want to assess the value of Demand Responsive Transport in these areas as a replacement for subsidised services – to what extent is this meeting the needs of passengers/how satisfied are passengers. Work in progress</li> <li>• Produce specification for project looking at level of communication when adding/removing bus services from the timetable</li> </ul>	<ul style="list-style-type: none"> <li>• Failure to secure cooperation from local authorities when reviewing demand responsive/community transport</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> </ul>	<ul style="list-style-type: none"> <li>Publish final report on Bus Punctuality Project (November 2014)</li> <li>Organise regional workshops for operators and local authorities (autumn 2014) – there has been preliminary agreement regarding venues and possible speakers. Currently waiting for information on when the guidance is to be published by traffic commissioners to progress this further, but significant delay is possible</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> <li>Still no indication as to when Traffic Commissioner Guidance will be issued</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>Discussions with ATOC on the appeal criteria underpinning the new Code of Practice on ticket irregularities. ATOC has now established a work group to look at this issue in more detail</li> <li>Individual discussions with TOCs continuing – some initiatives being taken on board, e.g. changing rules on what happens if a railcard is not presented aboard the train during ticket examination. Continuing discussions with DfT on penalty fare and prosecutions; similar conversations with BTP</li> </ul>	<ul style="list-style-type: none"> <li>Awaiting formal response from DfT on letter to minister</li> <li>Produce update on Ticket to Ride report (November 2014) – final draft produced</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 (PIDD) research published September</li> <li>TW re signal problems in July. Report submitted on their actions taken and information provided.</li> </ul>	<ul style="list-style-type: none"> <li>Scope research on attitudes to punctuality – quarter 4. Initial discussions held with ORR and DfT</li> <li>Outline agreement for joint work – part funded by us and Network Rail- on research into passenger attitudes towards severe weather. Funding proposal now with NR</li> </ul>	<ul style="list-style-type: none"> <li></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 commented on draft documents</li> <li>Code Practice Ticket Info: provided input and advice</li> <li>Raised concerns about Northern Rail's evening peak fare increase</li> </ul>	<ul style="list-style-type: none"> <li>Respond to ORR's formal consultation on Code Practice for Ticket information and the Market Study</li> <li>Preparation for January 2015 fare increase</li> </ul>		
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>Part of ORR working group to establish best ways to measure success and quality of passenger experience when making a complaint</li> <li>Response to ORR's consultation on establishing a new minimum core set of data for monitoring operators' complaints handling procedures</li> <li>Discussions with DfT and ORR on Alternative Dispute Resolution (ADR) process and our role in this.</li> </ul>	<ul style="list-style-type: none"> <li>Updated FAQs on website in progress</li> <li>Monitor progress of Consumer Rights Bill and identify opportunities</li> <li>Proposed review of National Rail Conditions of Carriage (Autumn)</li> <li>Respond to DfT consultation on implementation of Passenger Rights Obligation (PRO)</li> </ul>		
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>FGW performance is placed under particular scrutiny and effective action plans delivered on</p>	<ul style="list-style-type: none"> <li>Appointment of FGW Passenger Manager post helping to focus dedicated attention on NRPS performance across FGW operations</li> <li>Presented Spring 2014 NRPS results to First ScotRail, East Coast, Abellio Greater Anglia, South West Trains and First TransPennine Express and set up action plans to address areas of poor performance</li> <li>Presented our priorities and NRPS results at Govia/TSGN stakeholder forum</li> <li>Presented NRPS to London Midland, this was to their 4 route managers who updated us on particular plans to improve performance and NRPS scores on their patch</li> </ul>	<p>Setting up discussions with Northern, and Arriva Trains Wales to present Spring 2014 NRPS results</p> <p>Series of meetings with FGW management to understand issues and performance. Briefing FGW senior management team on initial feedback and Trust research on 04/11/14</p> <p>Presenting and discussing NRPS results with Senior Customer Service staff at SET</p>	Sufficient time to dedicate attention to a number of TOCs who require our dedicated assistance during a busy period	DS
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> <p>Maintain our work on smartcard developments Increase our bus profile</p> <ul style="list-style-type: none"> <li>Greater understanding of our role</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>Met with Confederation of Passenger Transport (CPT) Head of Communications and Head of Operations to brief them both on our full range of passenger research</li> <li>Member of DfT working group on reform of Bus Service Operators' Grant (BSOG). Shared smart ticketing</li> </ul>	<ul style="list-style-type: none"> <li>Analysis done and selected areas/bus companies not taking up NRPS will be offered presentation on other bus research to engage them in improving issues around punctuality and disruption handling etc. Research presentation is being updated</li> <li>Scope potential research on bus registration – 56 day notice</li> </ul>		DS

	<ul style="list-style-type: none"> <li>Increased profile in the more local bus industry</li> </ul>	research with the group and putting the case for the grant to incentivise improvements for passengers	<p>Smart-Bus</p> <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 later in 2014</li> </ul> <p>Bus Service Operators’ Grant</p> <ul style="list-style-type: none"> <li>Maintain input to BSOG working group to help shape forthcoming industry consultation on reforms</li> </ul>		
3.2.2	<p>Improved scores for operators through Bus Passenger Survey results</p> <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>Undertaken a full programme of 14 different bus-operator and transport-authority briefings to understand how they have used BPS 2014 results and seek commitment to 2014-15 collaboration/funding</li> <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>Linda McCord recently chaired the 2014 European Bus Operators’ Forum which enabled our BPS (and other) work to be made available to a significant cross-section of bus-industry stakeholders</li> <li>Held meeting with Essex and Thurrock County Council and First MD for those areas to follow up on BPS results. Specifically discussed poor scores for punctuality and some driver elements. First discussed their actions to improve these. Essex CC working with them</li> <li>BPS stakeholder reviews undertaken, consulting 26 stakeholders. Report produced with findings and recommendations for future stakeholder contact work</li> <li>Presented and discussed Spring BPS results at Bus Business Group for Go Ahead Group. Most MDs of individual Go Ahead Operations in attendance</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> </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	<p><b>ALL MODES - Make a difference locally</b></p> <ul style="list-style-type: none"> <li>passenger groups are empowered to work directly with operators and deliver local</li> </ul>	<ul style="list-style-type: none"> <li>Supported by staff from Passenger Team, Passenger Issues Team and Board Members</li> <li>Exchange newsletter is sent to 1000 subscribers around</li> </ul>	<ul style="list-style-type: none"> <li>Planning delivery of postponed user group meetings in Stirling and Exeter</li> <li>Will be writing a report on recommended future</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</li> </ul>	DS

	improvements for passengers	once a month to maintain engagement <ul style="list-style-type: none"> <li>Focused outreach with FGW RUGs and CRPs- attended Travelwatch South Watch annual meeting on 04/10/14 and met with Chair of the Cotswold Line Promotion Group 14/10/14</li> </ul>	approach for engagement with user groups by November 2014 <ul style="list-style-type: none"> <li>Follow up meetings with TWSW Chair and Secretary in November. Contributed an article to Cotswold Line Promotion Group's newsletter</li> </ul>	events	
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#### 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 74% overall passenger satisfaction with our service year to date (April to September 2014)</li> <li>Resolved 210 passenger appeals in September with an average resolution of 23 working days</li> <li>From April to September we received 1577 appeals and resolved 1354. In addition, 213 appeals were not pursued by the passenger, and we chose not to pursue 63 cases</li> <li>The top three operators generating passenger complaint appeals resolved between April and September were South West Trains, East Coast and Northern Rail</li> <li>For the appeals we resolved between April and September, 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>Met with one train company to deliver feedback from the follow-up review and now awaiting a written response to our recommendations</li> <li>Was invited to, and presented at, a meeting represented by customer relations managers of train companies to discuss how we work together for the benefit of passengers who complain</li> <li>Complaint appeal data for July - September 2014 has been updated on our online open data tool</li> </ul>	<ul style="list-style-type: none"> <li>Arranging a complaint handling review with another train company. Will be the eighth train company reviewed.</li> <li>Awaiting written responses from a further two train companies to complaint handling reviews</li> <li>Continue to work with our contact centre to improve performance for calls answered in 20 seconds, at 84% year to date at end October 2014 against a target of 85%</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> <li>DfT agreed to support 50% of the development cost of the BPS online data tool</li> </ul>	<ul style="list-style-type: none"> <li>Seeking additional funding to fully fund the remainder required to create the BPS data tool</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>Passenger Focus Accessibility Forum was held in London on 15 October 2014. Well attended by groups representing passengers with disabilities to hear talk from ORR and the DfT on station accessibility in franchising.</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). 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>Accessibility Forum date for Spring 2015 will be fixed shortly</li> <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> <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>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: <ul style="list-style-type: none"> <li>Transport integration in Scotland</li> <li>Passenger Priorities – Scottish cut</li> <li>Waverley Station</li> </ul> </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>Produced and ensured the tabling of the Annual Report 2013-</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder strategy currently under review</li> </ul>		HP

		14 <ul style="list-style-type: none"> <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> </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 September)</li> <li>57,177 emails delivered between April and July through our external marketing tool; 37,162 emails opened; 11,108 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 July - September 2014 and data made available to download as "Open Data"</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>Edinburgh Tram added to TPS programme for 2014-15</li> <li>Meetings held with all bidders for ScotRail franchise. They all indicated commitment to work with us mentioning additional funding for NRPS and other research.</li> <li>Stakeholder event and major events seminar held in Edinburgh / Glasgow in June 2014</li> <li>ScotRail funding Passenger Focus to undertake passenger survey at Haymarket station</li> <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>Funding from Transport Scotland and Bus operators for enhanced Autumn 2014 BPS</li> </ul>	<ul style="list-style-type: none"> <li>Work progressing with Transport Scotland and other national stakeholders to strengthen the passengers' voice in major infrastructure work at Glasgow Queen Street and Glasgow-Edinburgh upgrades. May involve co-ordinating role for Passenger Focus. Project inception meeting on 7 October</li> <li>Written evidence asked by Scottish Parliament on draft transport budget for 2015/16</li> <li>Mobilisation meetings with Serco (Caledonian Sleeper) and Abellio (ScotRail) to look at ways of working together.</li> <li>Research brief being prepared for consideration</li> </ul>		DS

		<ul style="list-style-type: none"> <li>● Set up meeting held for research on Glasgow Queen Street redevelopment- funded by TS/operator</li> <li>● Set up meeting held for research with Caledonian MacBrayne on ferry passenger survey - funded by Caledonian MacBrayne</li> <li>● Presenting our work for bus passengers at CPT Scotland AGM in October</li> <li>● Meeting with MD Serco (Caledonian Sleeper franchise) to discuss bespoke NRPS for Sleeper services. Looking at options to progress</li> </ul>	by Caledonian MacBrayne		
PM7.2	<b>WALES</b> <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>● Passenger Priorities and Trust research shared with key contacts in Welsh Government</li> <li>● Responded to Assembly Members' request for train delays information; liaising with Network Rail and Assembly research team</li> <li>● Investigated signal failures in Cardiff area. Included reviewing evidence and meeting senior ATW staff in early September. Review report sent to ATW with findings and recommendations for action</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</li> <li>● Met British Transport Police Superintendent Morgan about their target to improve public confidence by 10%. Using NRPS and other research to explore possible actions to raise awareness for contacting police and reporting passenger concerns</li> </ul>	<ul style="list-style-type: none"> <li>● Will share Welsh rail passenger priorities for improvement and trust research with stakeholders via a targeted email distribution</li> <li>● Follow up signal failures investigation with ATW later in 2014. ATW to present actions they have implemented following our report</li> <li>● Prepare approach to new Public Transport Users' Advisory Panel, introducing ourselves and our research/work plan. Currently awaiting Minister's confirmation of chair appointment and first meeting set-up</li> <li>● Continue input to Welsh Gov smart ticketing group, including meeting their consultant with regard to developing smart ticketing for the future</li> <li>● Continue discussions with BTP and Authority on initiatives to support achieving target to improve public confidence by 10%</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.</li> <li>● Targeting emails to share passenger priorities and trust research will initiate contact and invite meetings for follow-up</li> <li>● Advisory Panel establishment has slowed. Need to monitor and ensure we have an appropriate channel in the future for communicating passenger priorities in Wales</li> </ul>	DS