

## 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.

When adding new information - **keep in tracked changes** .

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

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 being undertaken</li> </ul>	<ul style="list-style-type: none"> <li>Passenger Team and Murray Leader nearly 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.</li> <li>Centro Spring wave publication imminent</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> </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>Stakeholder and technical review of the National Rail Passenger Survey being undertaken</li> <li>Boost of 12 Community Rail Partnership lines on 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> </ul>	<ul style="list-style-type: none"> <li>TfGM, Centro and Blackpool continuing their co-funding (SYPTe and NET declined but meeting with latter in September to discuss possible future involvement). Edinburgh Tram are also funding their inclusion in this wave</li> <li>TPS fieldwork commences in September</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>SYPTe unable to fund Sheffield</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>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
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> </ul>	<ul style="list-style-type: none"> <li>Key role in Transport Card Forum conference in September to share our research. 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</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>		IW

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
			Specific work to understand disabled passengers' needs from smart & integrated ticketing – in discussions. Initial meeting held with DPTAC June 2014 and in planning now		
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 first time</li> <li>A round of meetings with other stakeholders to discuss research programme and other issues</li> <li>Further discussion with DfT on research programme content and timings</li> <li>Issued brief for initial qualitative research</li> </ul>	<ul style="list-style-type: none"> <li>Internal staff briefings planned</li> <li>More stakeholder meetings planned, including Highways Agency on 19 September, and a 'getting to know each other' session with RAC Foundation</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 have confirmed additional resource for franchise work in 2014-15. This was requested to fund additional staff resource and research. Internal applicant has been appointed to the post of Passenger Issues Executive and will start work on 1 September.</li> <li>Bidding groups continue to seek out 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> </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> </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> <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</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>General <ul style="list-style-type: none"> <li>Research briefs being developed for three projects to be funded from the allocated DfT budget.</li> <li>Induction and work planning underway for new Passenger Issues Executive</li> <li>Franchise specific pages on website under development. Text provided and now being progressed by communication team.</li> <li>Internal audit on franchise activity</li> <li>Speaking at 'British Rail Conference 2014' on 11 September about passenger aspirations</li> </ul> </li> <li>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> </ul> <p>TSGN</p> <ul style="list-style-type: none"> <li>Govia Thameslink Railway commences operation on 14 September. (Attending launch event next day)</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>Discussions over targets for NRPS</li> <li>Determining further research projects to take forward on FGW from allocated funding for period of Direct Award 1 (to September 2015).</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

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		<p>procedure and penalty fare scheme</p> <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> <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 NRPS target factors for Direct Award 2 and provided input on, and encouraged DfT to set challenging but realistic targets</li> </ul> <p>Greater 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</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> <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> </ul>	<p>Greater Anglia</p> <ul style="list-style-type: none"> <li>• Second meeting with DfT Project Director and new team members for Greater Anglia franchise on 9 September</li> </ul>		

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
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>Meetings begun with Network Rail and ORR regarding the level of passenger engagement in CP5 enhancement projects – with a view to seeing where this can be improved in future.</li> <li>Passenger Priority research – research commissioned and report produced</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>16 July – feedback from agency on online community</li> </ul> </li> <li>Transport Committee inquiry: investment on railways <ul style="list-style-type: none"> <li>written submission</li> <li>gave evidence at hearing 14 July</li> </ul> </li> <li>Presentation/panel member at RDG transparency seminar on 7 July. Presentation argued for greater access to performance data</li> <li>Rolling Stock <ul style="list-style-type: none"> <li>Published Merseyrail rolling stock research</li> <li>Part of evaluation panel on innovation in train design competition Greater Anglia/Angel Trains class 317 mock-up visit – provided passenger perspective on design</li> <li>Met Eversholt Rolling Stock Leasing Company to discuss redesign of Class 320 units</li> </ul> </li> <li>Reacted to four recent train operator proposals to change ticket office opening hours, asking User Groups and other local stakeholders for comment to inform our response. Our intervention prevented changes at Manchester Piccadilly</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>Publish priorities research – September/October</li> <li>Participate in ORR's review of the Periodic Review (PR13) process</li> <li>Attend Rail Industry Planning Group (RIPG) looking at longer-term planning issues.</li> <li>There will be a session with HS2 Ltd. to disseminate panel findings more widely within the organisation</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>Better Bus Areas</li> <li>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>Improve passenger consultation and information</li> <li>Refresh tool kit</li> <li>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> <li>Demand Responsive Transport (DRT): five-fact finding meetings held with areas around community transport and feedback being provided for consideration of further research.</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>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</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 (October 2014)</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</li> </ul>	MH

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
	Commissioners		<ul style="list-style-type: none"> <li>Organise regional workshops for operators and local authorities (autumn 2014) – discussions on venues and speakers underway. Currently waiting for information on when the guidance is to be published by traffic commissioners to progress this further</li> <li>The above is very much in progress with PTE taking lead . Project approval requested and given in July.</li> </ul>	guidance would reduce the draw of the workshops for target audience.	
<b>PAX5</b>	<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.</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</li> <li>Continuing discussions with DFT on penalty fare and prosecutions; similar conversations with BTP.</li> <li>Concerns with Penalty Fares raised with David Brown</li> </ul>	<ul style="list-style-type: none"> <li>Awaiting formal response from DfT on letter to minister</li> <li>Await formal response from DfT on wider issues raised regarding penalty fares.</li> <li>Produce update on Ticket to Ride report (September 2014) – draft in production.</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 (report finalised and printed)</li> <li>Submission to DfT's weather resilience review. Final report contains several mentions of Passenger Focus</li> <li>Meeting with RDG concerning major disruption from weather related events.</li> </ul>	<ul style="list-style-type: none"> <li>Publish PIDD report (expected September)</li> <li>Scope research on attitudes to punctuality – quarter 4tr 4. Initial discussions also with ORR and DfT.</li> <li>Explore potential for joint research on passenger attitudes towards severe weather</li> <li>Discussions with ATW re signal problems in July. Passenger Focus to review actions taken/information provided</li> </ul>	<ul style="list-style-type: none"> <li>PIDD publication postponed to the Autumn following request/discussion with ORR.</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>Addressed ORR's Market Study seminar (looking at the effectiveness of the retail market) giving the passenger perspective on retailing. Discussions with ORR about issues arising. Opportunity to comment on draft documents.</li> <li>Provided input to ORR's Code of Practice on ticketing information</li> <li>Liaison with DfT re conclusions from Fares and Ticketing review</li> <li>Audit of TVMs – reports produced and sent to TOCs concerned. Responses being collated</li> <li>Heavy media response to July's RPI figure (which forms basis of January fare increase)</li> <li>Met with Northern Rail to discuss proposals to introduce an Evening Peak Restriction on a number of routes with resulting media coverage to Northern Rail's decision</li> </ul>	<ul style="list-style-type: none"> <li>Preparation for January 2015 fare increase</li> <li>Formal consultation requests from ORR on both the retail market study and the code of practice on ticket information</li> </ul>		

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
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>Input into Consumer Rights Bill (BIS, ORR and DfT)</li> <li>Published Passenger Experience report (joint with ORR)</li> <li>Produced report on implication of the Alternative Disputes resolution on passengers and Passenger Focus.</li> <li>Joining an ORR working group to establish best ways to measure success and quality of passenger experience when making a complaint</li> </ul>	<ul style="list-style-type: none"> <li>Updates for “Advice and Complaints” site on website in progress with intended new section on “Your rail passenger rights” and updated FAQs.</li> <li>Monitor progress of Consumer Rights Bill and identify opportunities</li> <li>Proposed review of National Rail Conditions of Carriage (Autumn)</li> <li>Response to ORR’s consultation on establishing a new minimum core set of data for monitoring operators’ complaints handling procedures</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> FGW performance is placed under particular scrutiny and effective action plans delivered on	<ul style="list-style-type: none"> <li>Appointment of FGW Passenger Manager post will help 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 fora</li> </ul>	Setting up discussions with Northern, London Midland and Arriva Trains Wales to present Spring 2014 NRPS results	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> 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>Meeting held to discuss how we ‘sell’ our suite of bus research and work externally. Passenger Team taking lead on progressing this.</li> <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> </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 later in 2014</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>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> </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> </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>Workshop events held in London, Manchester, Birmingham, York and Abergavenny attended by over 70 user group members</li> <li>Supported by staff from Passenger Team, Passenger Issues Team and Board Members</li> <li>Key themes discussed included rail franchising, how to respond to major consultations, open data and our research programme</li> </ul>	<ul style="list-style-type: none"> <li>Two events were postponed – Stirling and Exeter. Planning to deliver these later in 2014</li> <li>Will be writing a report on recommended future approach for engagement with user groups by November 2014</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

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
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 75% overall passenger satisfaction with our service between April and July 2014</li> <li>Resolved 201 passenger appeals in July with an average resolution of 31 working days.</li> <li>From April to July we received 1052 appeals and resolved 960. In addition, 140 appeals were not pursued by the passenger, and we chose not to pursue 43 cases.</li> <li>The top three operators generating passenger complaint appeals between April and July are South West Trains, East Coast and Northern Rail.</li> <li>For the appeals we resolved between April and June, the top comments raised by passengers were about complaints handling, fares, retailing and refunds and train-service performance.</li> </ul>		<ul style="list-style-type: none"> <li>Passengers may not be able to separate their complaint outcome from how we represented them</li> <li>Operators may be unwilling to give passengers gestures of goodwill over and above their obligations</li> </ul>	KA
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>We received a total of 7214 passenger contacts between April and July</li> <li>Achieved improvements to contact centre performance for calls answered in 20 seconds, now closer to 85% target – 84.3% year to date at end July 2014</li> <li>Online open data tool updated with latest complaint appeal data (April-June 2014)</li> <li>Met Virgin to deliver feedback from second/follow-up review.</li> <li>Carried out complaint handling reviews at Arriva Trains Wales and London Midland.</li> <li>Met Northern to discuss next steps of complaint handling review.</li> <li>Carried out a follow-up complaint handling review at First Great Western in July</li> <li>Met Arriva Trains Wales in July to deliver feedback from review and discuss the recommendations</li> </ul>	<ul style="list-style-type: none"> <li>Meeting arranged with London Midland in August to deliver feedback following recent review.</li> <li>Will be writing a report following the FGW review, due to be completed September.</li> <li>Project team meeting planned for September, to review progress and plan next stages, including possible stakeholder event</li> </ul>	<ul style="list-style-type: none"> <li>TOCs may not see the value in an independent review of their customer complaints handling</li> </ul>	KA
PM 4.2	<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>Scoping work for BPS data tool completed</li> </ul>	<ul style="list-style-type: none"> <li>Have begun engagement with the Confederation of Passenger Transport (CPT) with the aim of securing funding to create the BPS data tool</li> </ul>	<ul style="list-style-type: none"> <li>Insufficient funds available to create BPS data tool – seeking additional funding</li> </ul>	MH

#### 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 "Passenger Assist" 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</li> </ul>	<ul style="list-style-type: none"> <li>Passenger Focus Accessibility Forum was held in London on 2 April 2014</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</li> </ul>	<ul style="list-style-type: none"> <li>Planning in progress for next Accessibility Forum (set for 15 October 2014)</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

Ref/ Status	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success risks/issues	Owner
	needed	<ul style="list-style-type: none"> <li>looking at dementia-friendly transport</li> <li>Held Accessibility Forum meeting with wider attendance including senior DfT staff</li> </ul>			

## 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>774 media mentions until 22 August</li> <li>Passenger Voice published in April, May, June and July 2014</li> <li>Produced 21 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>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</li> <li>Responded to request to provide advice on the Consumer Rights Bill to the Opposition frontbench</li> <li>Exchange is sent to 1000 subscribers around once a month to maintain engagement</li> <li>Published "Open Data" for download from the online data tool for all waves from Spring 2003 to Spring 2014.</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder strategy currently under review</li> </ul>		HP
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>30% of passengers contacted after resolving their complaint appeal case, responded to our passenger satisfaction survey in July 2014</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>Q4 board meeting in Manchester May 2014</li> <li>ARAC report to board endorsed</li> <li>Q4 reports to board endorsed</li> <li>Online data tool updated with NRPS on day of publication in June</li> <li>Online data tool updated with latest complaint appeal data 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>Positive news from Transport Scotland, and some operators for central funding to boost BPS across Scotland, looking to finalise end August.</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</li> <li>Meeting with MD Serco (Caledonian Sleeper franchise) to discuss bespoke NRPS for Sleeper services</li> <li>Presenting our work for bus passengers at CPT Scotland AGM in October</li> </ul>		DS
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>Presentation to Bus Users Cymru sharing our research and fostering relations for possible joint approach to future research</li> <li>Key stakeholder meetings; DfT/Welsh Gov cross border rail forum, Network Rail/BTP community safety, ATW complaint-handling review</li> <li>Response submitted to SE Wales region for Caerleon new station consultation</li> <li>Providing cuts of NRPS and rail research to Jessica Morden MP, as background for Parliamentary cross-border rail issues debate (2 July)</li> <li>Passenger Priorities and Trust research shared with key contacts in Welsh Government</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>Investigating signal failures in Cardiff area. Currently reviewing evidence ahead of meeting with ATW in early September</li> <li>Responding to Assembly Members' request for train delays information; liaising with Network Rail and Assembly research team</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> </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. 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

# Key business performance measures 2014-15

	Target	April	May	June	July	August	September	October	November	December	January	February	March	YTD	RAG	Notes
<b>Passenger Team</b>																
PAS1	>70%	78.0%	81.0%	76.0%	61.0%									74.0%		
PAS2	>20%	33.0%	37.0%	29.0%	30.0%									32.3%		
PAS3	>85%	76.0%	88.0%	89.0%	84.0%									84.3%		some unplanned staffing changes, now replaced and trained
PAS4	>90%	73.0%	85.0%	83.0%	88.0%									82.3%		
PAS5	>75%	82.0%	83.0%	80.0%	77.0%									80.5%		
PAS6	>90%	96.0%	95.0%	97.0%	87.0%									93.8%		
PAS7	<01%	0.8%	0.4%	0.4%	0.9%									0.6%		
<b>Resources Team</b>																
RES1	<05%	-1.7%	1.4%	0.4%	0.1%									0.1%		
RES2	>95%	98.0%	100.0%	81%	100%									94.6%		Outturn for the year is likely to be in target
RES3	>95%	96.7%	100.0%	82%	100%									96.2%		
RES4	>95%															Data not available yet
RES5	<3.4%	0.7%	1.1%	1.1%	0.3%									0.8%		
RES7	100%	#N/A	#N/A													No starters in period to date
<b>Chief Executives Team</b>																
CEO1	>90%	100.0%	100.0%	50.0%	100.0%									87.5%		Delay in receiving papers from colleagues for JuneME
CEO2	>90%	100.0%	100.0%	50.0%	67.0%									79.3%		
CEO3	>90%	100.0%	100.0%	100.0%	100.0%									100.0%		
CEO4	>80%	33.3%	100.0%	100.0%	80.0%									78.3%		
CEO5	0	0	0	0	0									0		

**RAG indicators**

Too early to say	Good progress	On track	At risk
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