

Workplan report

Key objectives – 2015/16



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Updated: 08/09/2015



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Exceeding Expectations	Please include reasons for success
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Some concern over our ability to meet all of the objective	Please include reasons for barriers to success
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1. Work to improve the transport user experience

Ref	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success, risks/issues	Owner
	Key Objectives:				
1.1	Use our Bus Punctuality Project to refocus the bus industry, local government and Traffic Commissioners, including road shows on our research and the Traffic Commissioners' guidance	Six events held in Leeds, Bristol, Liverpool, Birmingham and London and Cambridge. All well attended by senior industry representatives from across many bus operators, local transport authorities and other industry stakeholder groups including Bus Users UK, Confederation of Passenger Transport and London TravelWatch. The "local" Traffic Commissioner presented at each of the events. Interesting issues raised and further actions proposed for us. There has been good feedback from the Traffic Commissioners and attendees who were able to raise concerns amongst local industry and authority colleagues.	A project review meeting is taking place on 1 September to assess the events. A summary of the issues arising and what further actions we should take will be considered along with usual logistic and budget reviews. One of the issues arising from the meetings was the need to contact the smaller operators. Following this feedback the passenger team has prepared a short video from the Liverpool event about the guidance and work being done. This is being finalised and we will consider how we will promote this and what we hope to see in response.	Many of the barriers to improving punctuality need improved communications between different agencies which have been poor historically - we may be able to help facilitate some improvements in dialogue. Sharing punctuality data is an issue and funding for improvement work, especially as local authorities are cutting budgets and there are concerns that enforcement work will be cut. These and other issues were raised at the seminars and we will consider how we can help the impetus to improve from the meetings spread to actions and keep the issues highlighted in further contact with the industry	MH
1.2	Identify road users' priorities and work with Highways England to improve their experiences	Research complete to understand user priorities for improvement to the Strategic Road Network. Priorities among car and van drivers and motorcyclists were published in July 2015 and shared widely with stakeholders.	Priorities for improvement among HGV drivers and logistics sector fleet managers will be published in Autumn 2015.	The finding that "improved quality of road surfaces" is the top priority for improvement - and by a significant margin - suggests that the standard currently provided is below what users want. Addressing this at a time of spending restraint may prove problematic.	GD

2. Make a difference for transport users through long-term planning

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2.1	<p>Strengthen the passenger voice in rail franchise replacement and monitoring</p>	<p>Franchise strategy DfT additional budget for 15/16 confirmed at £190k and split between staff and research costs agreed. NDA now agreed and signed. Presentation at Rail Industry Day on 7/7/15 was well received. Agreed wording to reflect requirements of NDA for inclusion in research tender and contract documentation.</p> <p>Franchise programme activity completed - Caledonian Sleeper and ScotRail franchises commenced operations. - East Coast - handover meeting with Passenger Team completed.</p> <p>Franchise competitions in progress Northern and TPE - Review of customer experience bid delivery plans completed. TPE specialist reported submitted to DfT 17/06/15. Northern specialist report submitted to DfT 16/07/15.</p> <p>East Anglia - Research report and consultation response published.</p> <p>Direct Awards FGW DA2 - Passenger Manager budget confirmed. - Briefed by DfT on award, 28/4.</p> <p>TPE - Briefed by DfT on award, 5/5/15</p> <p>West Midlands - Franchise research published.</p>	<p>Franchise strategy - Initial proposals for research discussed. Further discussion to be held. - Requirements of NDA to be discussed at Insight, P&I and PT team meetings and all staff/BMs to be alerted via Connect announcement from Jon Carter.</p> <p>- New approach to quality outcomes to be piloted on East Anglia. Ongoing meetings to explore statistical and procurement perspectives in more detail.</p> <p>- Member of ScotRail Advisory Panel will provide strategic advice to the leadership team of the ScotRail Alliance, making sure that the voices of business, transport partnerships, customer groups and environmental groups are always heard as we go about transforming Scotland's railway</p> <p>Franchise competitions in progress - in chronological order</p> <p>Northern and TPE - see recent achievements</p> <p>East Anglia - Follow-up discussions about consultation responses and development of specification. - Consideration of quality measures for new franchise. - Initial meetings with shortlisted bidders in progress.</p> <p>South Western - Preliminary discussion with DfT to discuss scope of franchise and research needs following announcement that negotiations for direct award unsuccessful and competition launched.</p> <p>West Coast - Initial meeting with DfT project team to consider scope of franchise plus data/research needs. - Initial meeting with Transport Systems Catapult to discuss ideas for innovation on the franchise and possible joint working. - Research project agreed, to be funded by DfT. Agency appointed and set-up meeting held w/c 24/08/15.</p> <p>West Midlands - Initial meeting with DfT project team to consider scope of franchise plus data/research needs. - Initial meeting with Centro to discuss approach to franchise and possible joint working. - Introductory meeting with new Project Director and Lead Specifier held on 17/6 and ongoing liaison agreed.</p> <p>Wales and Borders - Used stakeholder events in Cardiff to make introductions to people we will wish to contact regarding the next franchise. Initial meetings to be set up over coming months (in liaison with David Beer and Diane McCrea) .</p> <p>Direct Awards</p> <p>East Midlands - Provided input and advice to DfT on NRPS targets. - Progress update from DfT lead negotiator on DA 24/06/15. - Awaiting outcome of negotiations on DA terms.</p> <p>West Midlands - Ongoing discussion about potential NRPS targets.</p> <p>SWT - Work on revised NRPS building blocks to be carried over to franchise competition.</p> <p>Cross Country - Brief initial discussion with lead negotiator on 24/6/15. - Potential research project likely, pending confirmation of DfT budget.</p> <p>TfL Concessions - Briefing meeting held with Procurement Manager for Crossrail and London Overground, 11/5/15 - Initial meetings with shortlisted bidders in progress.</p> <p>Follow-up to completed competitions - Essex Thameside - updated NEx Bid Director on working relationships in new franchise. To agree an appropriate time to schedule discussion of joint working opportunities agreed at bid stage.</p> <p>Franchise research projects</p> <p>Passenger Charter - Revisions to second stage draft report, incorporating both desk research and expert interviews. Currently being finalised before sharing with DfT. Meeting scheduled for 2/9/15 to discuss conclusions and any follow-on steps.</p>	<p>General</p> <p>- Managing high level, and diverse range, of franchise activity. This is now exacerbated by a gap in resource and expertise available in P&I team following Guy Dangerfield's move to RD role and imminent departure of Jocelyn Pearson.</p> <p>- Timely publication of research and franchise submissions within a busy schedule.</p> <p>Franchise strategy - Level of resource that can be negotiated for research for specific franchise competitions.</p> <p>- Changes to DfT approach to requirements for and measurement of quality in franchises</p>	MH
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3. Understand the needs of transport users

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	Key Objectives:				
3.1	Boost the voice of bus passengers, through bus passenger priorities research and through reaching 50,000 passengers via the Bus Passenger Survey (BPS)	Final levels of participation on BPS 2015 for England are similar to those seen in 2014, but with Scotland reduced this year to First Bus only. Greater Manchester area this year has no co-funding from either TfGM or the main operators (Stagecoach and First), so we will be supporting this just ourselves, reducing the sample size considerably. Total target number of responses is 38,437, of which 2,300 are in Scotland, although final achieved number of responses may well be over 40,000.	Local questionnaires have recently been agreed. Online surveys to be tested w/c 24 August. Still chasing up some pro-forma agreement documents with co-funders. Fieldwork is due to start on 7th September. Spot checks to be set-up. Although too late for this autumn's BPS survey, we have received more encouraging feedback from Transport Scotland regarding their involvement in BPS and finding funding. We need to continue these discussions now, to lay the groundwork for the 2016 PBS survey.	Boost funders lack funds, especially local authorities. 'Going it alone' in Greater Manchester, means a reduced sample size, and there are considerable politics behind how the results will be viewed, interpreted and used by interested parties that we need to be wary of.	IW
3.2	Enhance the usefulness and value for money of the National Rail Passenger Survey (NRPS) and Bus Passenger Survey through new research methods, ensuring they continue to be fit for purpose for years to come.	NRPS consultation runs until 25 September. Social media monitoring underway for South East Quadrant	Emotional tracking to be piloted in September for SE Quadrant. Moving some BPS interviewng online, and improving sampling and weighting	Stakeholders resistant to proposed changes. Conversely larger changes desired which require large scale piloting/calibration, which would need funding	IW
3.3	Promote the voice of road users, trialling new research methods with a view to developing a satisfaction survey for the future	A positive meeting with DVLA has taken place, they were in support of our request for data and were happy to help. It was agreed that DVLA will invite people to register for NRUSS via their website. They also have no issue with the names on the database licence being used.	Meeting DVLA again 12 August to discuss outcome of proposals put to their board. Freight priorities being prepared for publication	DVLA board rejects use of driver licence database or insists on conditions we find unworkable. Face to face and online data collection give different priorities for HGV drivers	IW

4. Promote good practice in complaints handling and providing advice and advocacy

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	Key Objective:				
4.1	Handle cases where companies and passengers are deadlocked following a complaint, and gather intelligence to inform other areas of our work. We will achieve over 70% satisfaction with the way we deal with cases	Achieved 71% overall passenger satisfaction in July, up from 66% in June, which is back above our targeted 70%. Resolved 177 passenger appeals in July with an average handling time of 23 days, down from an average handling time of 30 days in June. As at 24 August 2015, the operators with the highest active case load are Cross Country, First Great Western and East Midlands Trains. The active appeal case load currently stands at 307. The top comments raised by passengers for appeal cases resolved in July related to complaints handling, penalty fares/unpaid fares notice/prosecution and fares, retailing and refunds.		Following a dip below our target in June, we have seen an improvement in our passenger satisfaction score in July. We have taken on two new SPTAs in order to accommodate change and manage an increase in incoming cases in recent months, which has restored stability within the team. The team are all currently dealing with a manageable case load and despite recent resourcing challenges, we continue to maintain steady overall active case numbers.	KO

Workplan report

Full report – 2015/16



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1.2	Identify road users' priorities and work with Highways England to improve their experiences	Research complete to understand user priorities for improvement to the Strategic Road Network. Priorities among car and van drivers and motorcyclists were published in July 2015 and shared widely with stakeholders.	Priorities for improvement among HGV drivers and logistics sector fleet managers will be published in Autumn 2015.	The finding that "improved quality of road surfaces" is the top priority for improvement - and by a significant margin - suggests that the standard currently provided is below what users want. Addressing this at a time of spending restraint may prove problematic.	GD
	Bus:				
1.3	Work with Passenger Transport Executives and local authorities to improve bus passenger services • use our work on demand-responsive transport to identify solutions to bus service cuts	The recent engagement of PTEs has largely been focused on their active involvement in our Bus Punctuality events and close working on their funding support of the next Bus Passenger Survey and Tram Passenger Survey. Also talking actively with TfGM and others about the recently launched Buses Bill and what that may mean for passengers and local bus services. Report on bus drivers (setting out their wider role and importance) published July and shared extensively with bus industry. Now following some leads to meet interested parties to see how this work can be delivered into businesses.	The team will continue to work with PTEs on actions that emerged from the 2014-15 BPS reports and the findings of our bus punctuality work. Report on demand responsive research/case study in production (September). In addition we have been asked by DfT to help with a small series of workshops they are planning to host across England that aims to explain the outputs from the Buses Bill. We have been asked to talk at each event to explain the current experience and future needs of bus passengers.	The bus devolution agenda is emerging and we need to develop our input into passenger needs which will be informed by our new passenger research on priorities for improvement and trust/relationship. Bus drivers - staff resources will inhibit the amount of follow up time available	DS
1.4	Encourage bus operators to value BPS results and see them as an important measure of their success and of their customers' feedback on areas to improve • work with operators with low scores to develop an action plan to improve	Final levels of participation on BPS 2015 for England are similar to those seen in 2014, but with Scotland reduced this year to First Bus only. Greater Manchester area this year has no co-funding from either TfGM or the main operators (Stagecoach and First), so we will be supporting this just ourselves, reducing the sample size considerably. Expecting in excess of 38,000 passenger responses in our remit area (England outside of London) which is on a par with our 2014 level.	As above - with view to achieving positive outputs and case studies. Discussions underway with authorities and operators for BPS 2015. Value of BPS being recognised in the level of response from previous and new areas. However two features also emerging: hesitation where impact factors such as major roadworks are foreseen. Also constraints on cost meaning some areas declining, but others cannot afford increases, so constraints applied to response levels to enable participation.	Potential for cost constraints to impact on ability for participation, particularly from authority areas. Discussing with areas about amending the time of year of our approach for funding, to fit more effectively with the timing of their budget process and feed into considerations. Potentially will lead to approaching for 2016 wave in autumn 2015. Also looking to bring more consistency and 'fairness' to funding of areas in future, with regards to operator funding. General principle to consider is that where results are broken out for an operator then they should be contributing towards the survey.	DS
	Road:				
1.5	Publish initial qualitative research work on road users' experiences of the SRN. Use research to commence discussions with Highways Agency about policies and operations	Initial qualitative research published 30 March 2015 and widely disseminated. Copies of full report sent to senior staff at DfT, Highways England and ORR. Research has been, and continues to be, used as an excellent introduction for Transport Focus in discussions with stakeholders.			GD

1.6	Use research published on at least one road user priority identified and use results to make a difference for road users	Four areas of road user concern highlighted in the initial qualitative research have been included in the road user team 2015/16 work programme as subjects on which Transport Focus can make a difference. These are: i. Research into SRN user needs and experiences during incidents and roadworks, including information provision; ii. Research into SRN user needs and experiences regarding motorway and other service areas; iii. Providing advice to Highways England about how best to reflect the views of the end user in its concepts (e.g. Expressways) and designs; iv. Planning 2016/17 research into the impact of driver behaviour and attitudes on road user experience of the SRN	ii. and iii. are in progress. Regarding ii., a 'brief' is about to be issued to research agencies to prepare proposals. Regarding iii., various meetings are taking place to understand what Highways England does in this area and so identify gaps	The Roads Team will be fully staffed for only six months of the 12 which, along with the unexpected Operation Stack work, may result in iv. (enabling work for the 2016/17 year) being deferred.	GD
	Rail:				
1.7	Work with operators to improve passengers' experiences during disruption by publishing and using reports looking into winter resilience and extreme weather, communicating suicides on the railway and keeping passengers informed during engineering work (for example at Bath Station) • encourage greater transparency of performance data • look into the suitability of compensation regimes for season ticket holders who endure persistent delays	NEW work plan activity: South East Quadrant Taskforce Weekly meetings continue. Progress made with NR to work with us as have agreed to send us disaggregated data, both PPM and right time so that we can target and challenge poor performance at route level. Workshop with taskforce being held on 25 August to look deeper into what our social media research is showing. Linda spent time with NR on 6th and 7th August with senior staff directly responsible for London Stations, London Bridge, Cannon St., Charring Cross and Victoria. This involved presenting our messages from key research on both planned and unplanned disruption and then fully discussing how they can ensure that they are reacting to this. NR are keen to ensure that they are working effectively with TOC staff at the stations, and are asking for our assistance. A forum with TOC senior station staff, NR and Linda has been arranged for 3 September. Coming up: tendering for additional research (App based emotional monitoring); preparing for ministerial meeting with South East MPs; obtaining more performance data from Network Rail and a briefing on Southern's December timetable change. Research report on 'communicating suicides' published July. Research report on 'extreme weather' published July.	Transparency - ongoing meetings with NR about quarterly Proactive publications. April meeting included further discussion about disaggregation and providing time series of right time figures. Also discussed scope to open up NRPS data from NR boost and cross-promotion opportunities for the August tranche which will be passenger focused. Research: Bath Engineering: Providing advice and insight to the FGW project planning team on passenger needs – including information, compensation and rail replacement bus services - in the run up to and during the disruption. Work includes a 3 wave research piece to understand levels of passenger awareness, information requirements and satisfaction with levels with information. Wave 2 now completed. A report will be published in the autumn so the rest of the industry can benefit from FGW's experience Report will be published in autumn Initial discussions with GTR about possible research on compensation	Internal staff changes and re-allocation of resources to the South East Quadrant work reduce ability to react to events and limit the amount of resource available to follow up opportunities with the planned research.	MH
1.8	Investigate initiatives to improve understanding of and tackle overcrowding, and promote best practice		Discussions with franchise bidders, PTEs, Rail North and rolling stock manufacturers about additional/improved capacity in north across the Northern and TPE networks	Longer term benefits to emerge as franchise decisions are announced. Issues exposed again in August within Northern franchise of rolling stock cascade ahead of franchise award decision having potential for reduction in quality of quantity of rolling stock	DS
1.9	Encourage Train Operating Companies (TOCs) to value NRPS results and see them as an important measure of their success and of their customers' feedback on areas to improve • work with TOCs with low scores to develop action plan to improve	A high level meeting, presenting and discussing recent NRPS results was held with GTR, including Southern who are now part of the larger franchise on 6 August. The results were not good on Thameslink, Southern and Metro lines and this was acknowledged by GTR. They have developed improvement plans, the detail of which will be discussed with Linda at individual meetings with the respective passenger service directors. Meetings have been arranged for September. Meeting with ScotRail on 24 August to discuss detailed action plans and best practice to improve NRPS results	Meetings held to discuss Spring results with GTR/Southern, AGA and LM. NH: Discussed FGW findings with Head of Insight, focus being on poor delay handling scores. Meetings also held to discuss Spring results with Virgin Trains East Coast, First TPE, Northern and ScotRail. Met with ATW to discuss much improved NRPS scores in Spring 2015 wave and action plans they have implemented to focus on right-time train service performance and customer service across the company - and how they are striving to continue the positive trend. Presenting NRPS/priorities/PIDD/trust to Network Rail Wales Route customer event on 1 September, encouraging to deliver train service performance in partnership across the industry.	We need to capture and report the outcomes and successes from our more recent work with TOCs	DS
1.10	• Highlight passenger 'value for money' perceptions, and respond to Government policy regarding fares and ticketing • Improve ticket retailing, including smartcards • Work with ORR on its retail market study and proposed ticket information code of practice	ORR Published Retail Market Review in June. Contained numerous references to our research. Meeting with CMA re block exemption for public ticketing (i.e. legal provision that allows operators to collaborate on pricing/ticketing). Participating in working group looking at contactless payment (involving the industry, DfT and the credit/debit card providers): presentation given on passenger attitudes and follow up sessions held to better explain passenger aspirations and issues. Revenue Protection - presentation to all SET revenue protection staff by Jocelyn and whole day accompanying them at work Attended ministerial summit on fares and ticketing (July) - set out passenger issues/concerns with fare structures and ticketing. Attended ATOC session on 'design guidelines for Ticket Vending Machines' July 2015 Report published on industry approach to 'lost property'	Ministerial session on Ticket Vending Machines (September) Await results from DfT consultation on Penalty Fares Respond to ORR consultation on Retail Market Review		MH
1.11	Ensure the passenger voice is heard in policy consultations – for example on revisions to the National Rail Conditions of Carriage	Responded to consultations: Network Rail East Midland Route Strategy, DfT Penalty Fares. Met with BTPA to discuss strategic policing plan New version of Conditions of Carriage produced - contains two significant wins for passengers (cash compensation and duplicate tickets)	Awaiting further review of National Rail Conditions of Carriage (to take into account changes to consumer protection regulation)	Resource availability is the main risk.	MH

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	Rail:				

2.2	Continue the HS2 Passenger Panel		First year findings published in June (report plus web page) Currently going round presenting to HS2 staff at lunchtime sessions to promote the panel and their work.		IW
2.3	Increase the passenger voice in the next High-Level Output Strategy (HLOS) 2019-24 – in particular punctuality targets	Responded to three Network Rail route studies; Great Western, East Midlands and Welsh routes, with evidence on passenger priorities for future service provision and development. Attended industry working group looking at performance metrics for CP6 (covering how to provide right-time and the provision of personalised 'my train' information). Contributed to the Shaw and Bowe reviews of Network Rail	Initial input via punctuality research (influencing performance metric) - see para 3.8 below Respond to the CMA consultation on 'competition in passenger rail services in Great Britain.		MH
	Road:				
2.4	Use road user evidence to understand how we can influence the second RIS	Our initial qualitative research, the priorities for improvement research and analysis of the last four years of National Road User Satisfaction Survey data give a good feel for the key issues Transport Focus should be advocating as user priorities for the second Roads Period (2020-2025).	We are continuing to engage with DfT, ORR and Highways England over Transport Focus's involvement in the development of RIS2, including whether additional research will be required.		GD
	Bus:				
2.5	Work to ensure any revised regulation of bus services focuses on improving the things that matter most to passengers	Research fieldwork underway with passengers across several areas of England to capture bus passengers' priorities for improvement. Submissions on TfGM quality bus partnership and MetroBus (Bristol) quality bus partnership consultation. We have been asked by DfT to help with a small series of workshops they are planning to host across England that aims to explain the outputs from the Buses Bill. We have been asked to talk at each event to explain the current experience and future needs of bus passengers.	Initial discussion with DfT re Buses Bill. Also held discussions with CPT and PTEG on their emerging priorities for any Buses Bill.	Longer term activity as bus devolution takes hold.	MH
	Cross-Modal:				
2.6	Ensure any devolution in administering and delivering transport services focuses on improving the things that matter to users	Responded to National Transport Plan for Wales consultation, giving evidence of passenger priorities and satisfaction, to direct quality improvements in implementing and developing services in Wales. Transport Focus conference organised and promoted to stakeholders for Edinburgh in September already seeing a fantastic response in terms of numbers and seniority of key stakeholders attending.	Member of Scottish Government Consumer and Competition Policy for Scotland working group providing input to ensure an effective system of consumer advice that allows Scottish consumers simplified access to appropriate information National Assembly for Wales Rail Infrastructure inquiry now postponed until spring, to allow for results of Network Rail Wales Route consultation. Have provided advice on terms of reference and will assist with arrangements for stakeholder event for user groups to discuss with AMs and will provide written and possibly oral evidence to committee evidence sessions in spring term. Currently working with National Assembly for Wales on their Bus industry inquiry, providing input to their terms of reference and advice towards recommended witnesses. Responding to request from Welsh Conservatives to provide input to manifesto policy preparation, ahead of National Assembly elections in May 2016. Welsh local government reorganisation in progress. Currently monitoring potential outcomes to devise strategy for connecting and working with new landscape.	National Assembly elections: - confirmed that current Transport Minister, Edwina Hart AM, will not be standing in May 2016 elections. Current not-for-dividend approach to next rail franchise has been her personal policy. Need to monitor any changes in policy and expectations with new administration.	DS

3. Understand the needs of transport users

Ref	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success, risks/issues	Owner
	Key Objectives:				
3.1	Boost the voice of bus passengers, through bus passenger priorities research and through reaching 50,000 passengers via the Bus Passenger Survey (BPS)	Final levels of participation on BPS 2015 for England are similar to those seen in 2014, but with Scotland reduced this year to First Bus only. Greater Manchester area this year has no co-funding from either TfGM or the main operators (Stagecoach and First), so we will be supporting this just ourselves, reducing the sample size considerably. Total target number of responses is 38,437, of which 2,300 are in Scotland, although final achieved number of responses may well be over 40,000.	Local questionnaires have recently been agreed. Online surveys to be tested w/c 24 August. Still chasing up some pro-forma agreement documents with co-funders. Fieldwork is due to start on 7th September. Spot checks to be set-up. Although too late for this autumn's BPS survey, we have received more encouraging feedback from Transport Scotland regarding their involvement in BPS and finding funding. We need to continue these discussions now, to lay the groundwork for the 2016 PBS survey.	Boost funders lack funds, especially local authorities. 'Going it alone' in Greater Manchester, means a reduced sample size, and there are considerable politics behind how the results will be viewed, interpreted and used by interested parties that we need to be wary of.	IW
3.2	Enhance the usefulness and value for money of the National Rail Passenger Survey (NRPS) and Bus Passenger Survey through new research methods, ensuring they continue to be fit for purpose for years to come.	NRPS consultation runs until 25 September. Social media monitoring underway for South East Quadrant	Emotional tracking to be piloted in September for SE Quadrant. Moving some BPS interviewing online, and improving sampling and weighting	Stakeholders resistant to proposed changes. Conversely larger changes desired which require large scale piloting/calibration, which would need funding	IW
3.3	Promote the voice of road users, trialling new research methods with a view to developing a satisfaction survey for the future	A positive meeting with DVLA has taken place, they were in support of our request for data and were happy to help. It was agreed that DVLA will invite people to register for NRUS via their website. They also have no issue with the names on the database licence being used.	Meeting DVLA again 12 August to discuss outcome of proposals put to their board. Freight priorities being prepared for publication	DVLA board rejects use of driver licence database or insists on conditions we find unworkable. Face to face and online data collection give different priorities for HGV drivers	IW
	Bus:				

3.4	Investigate effectiveness of demand responsive transport as compared with scheduled services	Demand responsive transport (DRT) research completed in three regions and initial findings were presented by Define on 30 April. Initial results of work discussed has been with the areas covered. We also discussed potential use of the report in policy work with the Local Government Association and the Community Transport Association. The research areas are working with us to provide the background about their choice of DRT for our findings.	Publication planned in Autumn 2015 once the broader report has been completed. Consideration is being given about how to promote the findings most usefully, especially as many areas are using some elements of DRT in their transport plans. We have maintained a database of areas we spoke to initially and our research can help authorities looking to use DRT understand what the passengers' experience has been. It can help those planning understand what can be achieved and the limitations of the schemes.	Many areas are using some form of DRT and we have to consider how our research will be most useful. We do not want the research to go unnoticed or used.	IW
3.5	Publish research enabling us to better understand passengers' trust in the bus industry	Qualitative stage of 'trust' and 'priorities for improvement' research completed. Quantitative stage underway	Quantitative stage fieldwork due in September. Output now being planned for October 2015.		IW
3.6	Working with industry and Welsh Government to promote and develop the commissioning of a bus passenger survey in Wales		Developed a BPS proposal for Welsh Assembly Government and Operators to consider. Presented at Minister's advisory panel (PTUAP) and recommendation is going forward to the Minister. Also presented to bus operators' collective (CPT). They are not able to boost financially as a group. Pursued individually with operators, however declined due to funding constraints. Proposal amended for Minister to consider full funding. No formal response, however civil servants advised unlikely. Deadline for inclusion in 2015 BPS now expired. Will consider for 2016.	CPT not giving financial backing may have influenced operators not to act individually. Minister unlikely to give Welsh Gov funding to complete package. Will amend approach and re-apply when budgets are being considered in the autumn.	DS
	Rail:				
3.7	Publish autumn and spring National Rail Passenger Survey – including more route-based NRPS data, at-a-glance charts and open data on our website	Comms developed some infographics for follow-on media use that have proved popular. NRPS data explorer updated and open data published for latest Spring wave on the morning of publication (25/06).		Adding verbatims to open data requires different data handling, best addressed in new NRPS contract	IW
3.8	Publish research looking into passengers' views on punctuality and performance		Research finalised - likely publication early Sept		IW
	Road:				
3.9	• Publish our initial qualitative exploration of road user opinions and experiences • Conduct research to understand user priorities	The priorities of car and van drivers and motorcyclists has now been published	Priorities of HGV drivers and haulage industry fleet managers to follow during the summer.	Face to face and online data collection give different priorities for HGV drivers	IW
3.10	• Conclude and publish a road user research methodology study, and discuss with stakeholders • Trial new research methods with a view to developing a new satisfaction survey for the future		The study of research methodology for measuring road user satisfaction is complete and has been shared with DfT, Highways England and ORR – due for publication Summer 2015. Current focus is on discussions with DVLA about their inviting individual driver's licence-holders to be part of a Transport Focus panel. Signs positive, although still subject to DVLA board approval. Once agreed, the focus will be on developing pilots of the new methodology. Work to begin shortly on preparing tender documents for Transport Focus to procure continuation of the existing National Road User Satisfaction Survey from April 2016, to run in parallel with its replacement.	DVLA board rejects use of driver licence database or insists on conditions we find unworkable.	IW
	Tram:				
3.11	• Use the results from the first and second TPS to drive improvements for passengers • Repeat the TPS, and secure a longer-term funding model • Secure buy-in from more areas	Contract for 2015 TPS awarded to BDRC. Discussions with funders has resulted in a repeat of the 2014 survey, so the same 6 networks will be taking part. The expansion of Nottingham and Manchester networks means that we will be covering an additional two lines this year, with a slight increase in number of responses. Increased costs for TFGM were reluctantly agreed to, but we are still in discussion with the local operator to see if they can share some of the funding.	Sampling being conducted by agency - using similar approach to BPS, by taking into account the real patronage data available for each network (which we have been successful in requesting). Questionnaires to be finalised, including new wording around data confidentiality.	Croydon still desirable addition but no one wants to fund (and we cannot). TFGM had some reservations around taking part, given schedule of construction work on their lines, which has resulted in us delaying start to their fieldwork by 2 weeks. They have also asked us to include more context around the differences between networks in our reports and survey launch event, to allay fears that local media will only look at the 'league tables' of results. No funding from Nottingham (as usual, despite contacting the operator as well as the local authority this year) means that the 250 target responses will have to be split across the two lines, rather than increasing the sample to account for the increased number of lines. West Midlands have engineering works for 2 weeks starting on 22nd October, with risk that this could over-run. Plan is to get between half and two thirds of fieldwork completed before this date.	IW
	Coach:				
3.12	• Carry out a coach passenger satisfaction survey • Present it to the industry and discuss any issues of concern highlighted in the survey results		Head of Insight was to meet National Express 29 July 2015 but NX management changes have resulted in the meeting being put back to October..	NX as dominant operator may not see added value of benchmarking. Do a lot of their own work.	DS / IW
	Cross-Modal:				
3.13	Produce regional, cross-modal satisfaction reports where possible		Will be part of TPS and other output	Need to ensure common questionnaire wording across modes where possible	IW
3.14	Continue to develop the Smarter Ticketing programme, including • publish research looking at passenger issues surrounding ticket innovation • promote the views of passengers in the South East Flexible Ticketing scheme • publish our report on the c2c Smart Ticketing pilot • publish reports on local smart ticketing bus pilots, for example Brighton and Hove and Norfolk • prioritise the interests of passengers in the Smart Ticketing for Wales scheme	Preparing publication of Ticketing innovation (carnets), South East Flexible Ticketing, both should be published in September. c2c presented and report being written with publication due later in the year. Brighton and Hove project fieldwork to complete in September. Extra team member for Smart for 12 months (from Smart budget) Presented our work at CILT (Chartered Institute of Logistics and Transport) seminar in early July and at ATCO (Association of Transport Co-ordinating Officers) Annual Conference in June. Met with Centro to discuss smart ticketing and possibilities of working together on research in the future.	Ongoing discussions about new projects for this year - meetings on 27 August & 14 September to discuss several potential new projects around: carnets, contactless, Northern Powerhouse, use of mobiles for ticketing and how paper tickets are currently used.		IW

4. Promote good practice in complaints handling and providing advice and advocacy

Ref	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success, risks/issues	Owner
	Key Objective:				
4.1	Handle cases where companies and passengers are deadlocked following a complaint, and gather intelligence to inform other areas of our work. We will achieve over 70% satisfaction with the way we deal with cases	<p>Achieved 71% overall passenger satisfaction in July, up from 66% in June, which is back above our targeted 70%.</p> <p>Resolved 177 passenger appeals in July with an average handling time of 23 days, down from an average handling time of 30 days in June.</p> <p>As at 24 August 2015, the operators with the highest active case load are Cross Country, First Great Western and East Midlands Trains. The active appeal case load currently stands at 307.</p> <p>The top comments raised by passengers for appeal cases resolved in July related to complaints handling, penalty fares/unpaid fares notice/prosecution and fares, retailing and refunds.</p>		<p>Following a dip below our target in June, we have seen an improvement in our passenger satisfaction score in July.</p> <p>We have taken on two new SPTAs in order to accommodate change and manage an increase in incoming cases in recent months, which has restored stability within the team.</p> <p>The team are all currently dealing with a manageable case load and despite recent resourcing challenges, we continue to maintain steady overall active case numbers.</p>	KO
	Rail Passengers:				
4.2	Explore new methods of handling passenger contact/appeals • work with the DfT on the implementation of Alternative Dispute Resolution (ADR) within the rail industry	<p>We are undertaking a review of our approach with passengers, focusing firstly on short term amendments to our processes. This involves consultation with internal and external stakeholders, and an analysis of the passenger feedback we have received over the last year. Later this year, we will broaden this out to explore longer term aspirations.</p> <p>To complement ORR's new focus on quality, Transport Focus proposed a satisfaction survey for passenger complaints. We are working closely with ORR to implement a new TOC-wide passenger satisfaction survey, which will be sent to a sample of passengers at the end of their complaint with an operator. This is a very positive step for the rail industry in monitoring quality of complaints handling. NRPS categories shared with ORR to help their early work to define complaint categories which will form a key part of their work to draft a generic passenger satisfaction survey that will assess how TOCs have handled individual complaint cases.</p>	We are in discussion with other organisations and industries that are in the process of implementing ADR. Within rail, the proposal is that the rail industry will signpost to the residual ADR body, as per the requirements in the ADR directive, but passengers will be advised to contact Transport Focus as normal with their unresolved rail complaints.	Await any decision by DfT on ADR in rail.	KO
4.3	Work with the ORR on the development and implementation of the new rail industry complaints handling procedure and quality measures • work with the industry to formalise a TOC complaints handling audit programme, with a view to developing a "complaints handling audit" product		ORR's complaints handling guidance is now out for public consultation. This proposes the new guidelines upon which TOCs will produce their complaints handling procedures, as well as the data requirements, against which quality of complaints handling will be measured.		KO
4.4	Ongoing work: • handle enquiries from passengers, and intervene in issues raised from complaints • engage proactively with TOCs to help improve first-time complaint resolution • carry out in depth complaints reviews with up to four train companies • ensure the results of these reviews are understood and are acted upon • comment on, and seek to make improvements to, proposed complaints handling procedures by TOCs and their application • release complaints handling data onto our online data explorer		We have now completed the series of complaint handling reviews. The next stage is to do a full review of key findings, recommendations and possibly put together a brief good practice guide that could be discussed with the wider TOC network. Intention is to have this completed by end of September		KO

5. Improving access to services for transport users

Ref	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success, risks/issues	Owner
5.1	Investigate the experiences of bus passengers with disabilities • analyse NRPS, TPS and BPS to assess the views of those with disabilities • ensure that the views of those with disabilities are captured in our research programme • publish research looking into disabled passengers' views of Smart Ticketing • comment on and seek to improve operators' proposed Disabled People's Protection Policies and their application • hold two meetings of our accessibility forum each year	<p>Presented our work at Vision 2015 (sight loss sector annual conference) and CLIT (Chartered Institute of Logistics and Transport) accessibility seminar</p> <p>Accessibility Forum met in April. Presentation on NRPS and BPS results for those with disabilities.</p>	<p>Research looking at attitudes of passengers with disabilities towards smart ticketing is beginning.</p> <p>Autumn Forum - planning underway</p>		MH
5.2	Present research among young people more effectively, including analysis of Bus Value for Money research, NRPS, BPS • consider using tighter age bands for more specific data.				IW

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

Ref	What we want to achieve	Recent achievements	Work in progress/outstanding work	Barriers to success, risks/issues	Owner
6.1	<p>Communicate:</p> <ul style="list-style-type: none"> • develop and introduce a new brand • refresh and maintain an easy to use website - seek and publish feedback • publish monthly newsletters for passengers and road users • expand social media usage, and use technology to our advantage – for example webinars, interactive websites and instant messaging • maintain a 24 hour press office • increase awareness of our publications • increase access to and usefulness of our research data • publish proceedings 	<p>Rebrand has now been completed. Website is live, new roads e-newsletter is in regular production and media coverage has been uniformly positive.</p> <p>We continue to provide a 24-hour press office and out-of-hours calls have increased significantly.</p> <p>We are exploring new/digital media channels.</p>	Still working on some 'snagging' issues with website - ongoing.	<p>Team resource vs volume of work is starting to feel challenging - social media always the first casualty.</p> <p>Our work is dependent on content from elsewhere in the organisation so can be tricky to populate the newsletters/keep website looking fresh and up-to-date.</p>	SN
6.2	<p>Track:</p> <ul style="list-style-type: none"> • number of transport users we engage with through consultation, research and our contact team • stakeholders we have influenced • staff attitudes through an annual survey • stakeholder views through a survey 	We are tracking staff attitudes via the changeometer. We also will continue to regularly publish the interchange newsletter.			VC
6.3	<p>Report:</p> <ul style="list-style-type: none"> • six times a year in public at Board Meetings, held in different locations around the country • Audit and Risk Assurance Committee reports to the board • monthly performance and financial reports • annual published report on performance, activity and expenditure • examine other ways to gather and report our effectiveness • update our online data tool each quarter 	<p>Board met in Cardiff, May 2015, London July 2015</p> <p>Board committees report back at next meeting</p> <p>Finance and performance reported monthly, bi-monthly to the Board</p> <p>Annual report and accounts published</p> <p>New Gifts and Hospitality log and reporting process launched</p>	<p>Board Meeting in Edinburgh September 2015, Newcastle November 2015</p> <p>Project framework and reporting upgrade ongoing</p>		JC
6.4	<p>Change:</p> <ul style="list-style-type: none"> • reaffirm commitment to all stakeholders as we take on our expanded remit • conclude the change process with a clear picture of roles and structure across the organisation 	Media statements and releases all include messaging on expanded remit/commitment to existing work. July Change Team meeting formally closed the 'Road to Change' Programme as all key deliverables have been implemented with the exception of a 'final' structure (see outstanding work)	Structure continues to be fluid due to changing business demands and unknown outcomes of SR15	We now have to take into consideration anticipated cuts to budget as a result of SR15. This is likely to have an impact on desired structure, however the status remains green as we should have a clear picture of org design and FTE's by the end of the financial year	VC
6.5	<p>Organisation:</p> <ul style="list-style-type: none"> • run organisation efficiently, with proportionate governance that allows us to operate with transparency and accountability • strengthen internal and external communication • ensure office accommodation is fit for purpose 	Ad hoc staff newsletter, "Interchange", circulated	More regular staff communication tools in development (SN)		JC / NH
6.6	Develop an alternative funding model to ensure Transport Focus is able to continue to campaign on behalf of transport users whilst improving the value for money of its products.	Alternative funding group launched to examine options	Discuss future funding options with DfT		JC / NH

