

Passenger Focus's Guide to Passenger Panels

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1.0 Introduction

1.1 About Passenger Focus

Passenger Focus is an independent public body set up to act as passenger watchdog: protecting the interests of passengers and working to get them the best deal.

We place a strong emphasis on evidence based campaigning and work to understand passenger views and needs using qualitative and quantitative research and statistically robust analysis. As well as undertaking the National Passenger Survey (rail) and the Bus Passenger Survey, we commission various bespoke research projects to further understand the views of passengers.

We also represent passenger interests in the rail and bus industry: working to get the best deal for passengers in areas such as industry planning and strategy.

1.2 Passenger Panels

We are aware that both train and bus operating companies frequently wish to work directly with their passengers through passenger panels. Passenger panels can be an extremely useful tool as they provide feedback on services and generate ideas in terms of service improvement and possible new products. Panels can be a comparatively cheap source of customer feedback in that the running costs are limited to staff time, meeting costs and the incentives that the company uses to attract and retain panel members. These panels, however, vary in usefulness and their success can depend heavily on the way in which they are instigated and run.

Helpful Hints: Advantages and disadvantages of Passenger Panels

Panels offer a number of potential advantages:

- they can be relatively cheap to set up and administer
- they create relationships which enable two-way communication to continue over a period of time
- they can facilitate more informed feedback from passenger representatives who may be able to appreciate the wider context in which proposals for change are being put forward.

However, they suffer from a number of potential disadvantages:

- panels only ever give you the views of a small number of passengers and their needs, experiences and opinions may not be typical – it is therefore dangerous to rely on them on their own
- the views of panel members may become more out of touch with those of the majority of passengers the more they learn about bus operations and transport planning
- panels can easily run out of steam once the momentum of the first few meetings has passed.

Bearing in mind the benefits and drawbacks of passenger panels, if a panel is recruited, structured and run in an appropriate way then it can provide useful ideas and opinions.

Passenger Focus, as a result of our varied experience in supporting organisations to develop passenger panels in both the rail and bus industries, has developed this guide: addressing the various options for consideration to provide a starting point for any organisations looking to set up or refresh a passenger panel.

We have also examined two case studies to illustrate how different passenger panel formats can be utilised to achieve the aims of the organisation.

This guide is designed to support operators and/or local transport authorities that are interested in setting up a passenger panel. We have looked carefully at the process of setting up and running a panel and have considered the questions that you should ask, focussing on:

- key questions to ask when considering setting up a passenger panel
- key questions to ask when setting up a passenger panel.

This guide is designed to combine our experience with industry best practice: it is not intended to be prescriptive, however, because the way in which a passenger panel is established should vary depending on what the train or bus operating company is hoping to achieve.

2.0 Key questions to ask when considering setting up a Passenger Panel

2.1 Do we need a panel?

Prior to setting up a passenger panel, the question “Is a panel needed?” should be considered first and foremost.

Helpful hints: Have you considered the alternatives?

Most panels are set up on the basis that they will help the operator and/or authority to find out about the views and experiences of their passengers: what is working well and not so well, and how concerns might best be addressed. A panel represents one way of doing this, however, there are a number of alternative approaches that should be considered including:

- commissioning fresh opinion research or using existing research
- talking to groups that represent passengers, e.g. Passenger Focus, TravelWatch, Bus Users UK
- analysing complaints and other correspondence.

Passenger Focus can help you to apply the findings of existing research to your situation and to think through, from a passenger perspective, how to address concerns and make improvements. Other user groups also gather the views of passengers and monitor the performance of services, and can offer help to operators and authorities.

An intelligent analysis of complaints data can reveal a good deal about the issues passengers are dissatisfied with, particularly if complaints are actively welcomed and complaints procedures well publicised. However, a complaints analysis should not be relied on as an overview of all of the issues that matter to passengers.

It may be useful to outline a business case for running a panel – demonstrating the expected costs of the panel (both actual costs and resources) and what the organisation aims to receive in return in terms of outputs. A business case should indicate:

- frequency and timing of meetings
- meeting locations: this needs to be given consideration in terms of convenience for both panel members and staff. It may be that the panel is geographically dispersed in which case the organisation may consider rotating meeting locations or consider a location which is ‘central.’
- Incentives (see section 2.6).

2.2 What do we want from our passenger panel?

If you make the decision that a passenger panel is the way forward for your organisation, it is important that you are clear in what you wish to achieve: you should set out your aims with regards to the types of feedback you wish to receive and any outputs you hope to achieve. This will impact upon the set-up, structure and format of the panel. For example, if the organisation wishes to obtain an overview of its service as a whole it is important that the panel is comprised of a representative group of passengers (geographically, demographically and by journey purpose).

Helpful Hints: Setting objectives

When considering objectives, bear in mind that a passenger panel should not be used for determining the priorities of passengers or passenger satisfaction levels. This should only be done by talking to a representative sample of passengers, e.g. via a professionally-conducted survey.

A passenger panel may be suitable for testing initial passenger reactions to generic initiatives, for example concerning information about bus services, which can be subsequently trialled with a larger group of passengers.

A passenger panel may also be better placed to comment on more abstract policy areas, such as the local implications of competition policy, or the details of personal security or ticketing initiatives, where traditional opinion research techniques might be undermined by lack of time or knowledge (although more sophisticated deliberative research techniques could be used).

It may be particularly appropriate for a local authority to convene a passenger panel to advise on the progress of a quality bus partnership or quality contract, where a regular supply of performance information is available. Punctuality Improvement Partnerships and other ongoing joint initiatives may also lend themselves to this kind of approach.

2.3 Who should be involved?

Once an organisation has an idea of what they hope to achieve through the use of passenger panels, it must look to establish a suitable member profile. You should consider what involvement your own staff will have and at what level, as well as the types of passengers that you wish to recruit.

2.3.1 Who will handle the administration of the panel?

Managing a passenger panel will require a significant commitment of staff time and this should be recognised and planned for from the outset. A responsible person that will coordinate recruitment, organise meetings, take meeting minutes, disseminate communications and promote successes should be identified. Your objectives should help you to determine where the panel sits in the organisation's decision-making structure, and this in turn will help to inform how agendas are generated and actions followed up.

2.3.2 What involvement should senior management have?

Buy in to, and involvement with, the panel at a senior level of management should be strongly encouraged and may even be considered a prerequisite for a successful panel.

Although we do not recommend that senior members of management chair meetings it can be valuable for panel members to meet the 'decision makers' to reinforce the message that their opinions and work are of value to the company.

2.3.3 What kind of passengers do we need?

It is suggested that an organisation looks to develop a role profile which outlines the characteristics that an ideal panel member would have. Although the members of the panel will not be remunerated for their involvement, it is important that those recruited are motivated and enthusiastic about the aims of the panel.

The demographics of the group should largely reflect that of the organisation's customer base. This may be tricky, where passengers are largely commuters (and may have limited time to volunteer) or one-off leisure users, however targeted recruitment and well thought out incentives can mitigate this risk.

2.4 How big does the panel need to be?

Panel size should take into account the logistics of arranging and managing a meeting where many different ideas and points of view will be expressed. Passenger Focus does not wish to be prescriptive, however, from experience it would seem that between 8 and 12 members is appropriate. Do not worry too much about identifying representatives who are typical of all passengers – a group of a dozen or so passengers will never be able to represent the full diversity of needs, experiences and opinions. It is more important to select people who can represent the passenger perspective whilst also making effective use of information such as robust opinion research, an analysis of complaints and a regular supply of disaggregated performance data.

It should be remembered that membership is essentially voluntary and there may be occasions where members may not be able to attend meetings or may have to rescind on their commitment. It is therefore worth considering recruiting enough people for the panel with people in reserve to take part when needed. One train operating company has a panel of over a 1000 members that are asked specific questions via email every month and a selected group attends meetings.

2.5 How often should the panel meet?

An appropriate frequency for panel meetings depends somewhat on the aims of the organisation. You should take into consideration, however, the time commitment required of the panel members as well as availability of staff.

In order to build any kind of momentum, the panel probably needs to meet no less than three times a year. However, if it is to play a useful role in informing decision-making, meetings need to be scheduled carefully to take advantage of the availability of relevant information and the development of options. Thought should be given at the start of each year to an annual programme of panel meetings.

Consideration also needs to be given to when the meetings take place to ensure adequate attendance: for example, lunchtime meetings may make it easier for senior members of staff to drop in but will require a greater time commitment from those panel members that are usually at work during the day.

2.6 How will we incentivise panel members?

Perhaps the biggest incentive for people volunteering their time is a commitment to securing positive outcomes from the work of the panel. In committing to listening, and responding to, issues and ideas raised by the panel the organisation can demonstrate that it values their time. It is important that positive outcomes are captured and promoted in such a way that recognises the input of the panel members.

Helpful hints: Incentives

Any incentives offered to panel members are at the organisation's discretion. Incentives make take many forms but can include:

- refreshments at meetings
- complimentary travel to and from meetings
- complimentary tickets
- paying for childcare during meetings for panel members with children
- training/development.

Arranging visits to depots or behind the scenes at stations can also incentivise and motivate.

3.0 Key questions to ask when setting up a Passenger Panel

Once a business case for a passenger panel has been approved, you will need to consider the process of recruitment for, and running of, the panel.

3.1 How do we recruit appropriate members?

Recruitment can take place in many ways: you should consider costs in your business case but it is worth bearing in mind that the methods you use need not be expensive. Previous recruitment drives have used:

- posters at stations/stops
- adverts on company websites
- adverts in company newsletters/magazines
- existing rail/bus user groups.

Passenger Focus would urge caution if recruiting panel members from customer databases (for example, complainants details) as a passenger that has had a problem with the organisation previously may not contribute constructively and objectively to a passenger panel.

Communicating the recruitment campaign widely throughout the company is also important as this can assist in raising the profile of the panel and what it aims to achieve.

3.2 What should our recruitment adverts look like?

Recruitment adverts can take whatever format you wish but they should explain clearly the nature of the role of a panel member. An advert does not necessarily need a formal job description but an informal indication of what the organisation requires of the potential panel member should be included.

It is essential that a volunteer has a motivation to donate their time and so any advert or recruitment campaign should explain what the company will offer in return. It should be made clear whether the passenger's expenses will be covered and mention any incentives that the company is offering. A closing date for applications should be also be included.

Helpful hints: What should you look for from a Passenger Panel member?

This will vary to some extent depending on your aims and business case, however, in terms of skills you may broadly wish to recruit someone that is:

- willing to bring their ideas and experiences to discuss with other passengers and members of the organisation
- happy to share information at meetings and input into discussions
- a regular customer (a stated frequency may be useful for clarity purposes)
- willing and available to attend a specified number of meetings a year
- tolerant and open minded (non judgmental)
- willing to gather information from and feed back to other passengers if required (for example, by writing brief articles for websites/ newsletters etc).

3.3 How do we select the right members?

Although the role is essentially voluntary, it is still recommended that a thorough vetting process is followed to ensure that a member is recruited to the panel with the right skills and for the right reasons.

Once the recruitment period is concluded, it is recommended that potential panel members are interviewed, either by telephone or face to face, to establish their suitability. The role profile that you outlined in your business case can be used to develop a competency matrix for use during the recruitment process.

It is important that unsuccessful applicants be notified and communicated with: they have offered their time to the organisation and, as customers, would no doubt appreciate an acknowledgement.

3.4 How do we establish the panel's terms of reference?

Once the panel has been recruited, a set up meeting is a useful tool to break the ice with members and to establish the terms of reference of the panel.

There are many different ways of doing this. One way which Passenger Focus has found successful is to allow the group to meet without representatives of the company and, working with Passenger Focus, outline their views on what the terms of reference should be. The company can then meet with the panel to discuss their views and come to a mutual agreement.

Helpful hints: What should the terms of reference include?

- rights of members
- responsibilities of members
- decision making powers of the panel
- perception of what the organisation is trying to achieve
- terms and conditions of membership (this should reiterate what was included in the recruitment process)
- budgets
- training required.

Helping panel members to understand the way that the business operates can be really useful at this early stage as it can provide a framework for their ideas and encourage questions and dialogue between the organisation and the panel.

3.5 How long should the panel last?

We would suggest that in establishing the terms of reference, the panel should consider its own life span. It may be that over time, the panel becomes ineffective or moves away from the original aims of the company.

With the best will in the world, the more time passenger representatives spend with operators and authorities and the more they understand the challenges of planning transport networks, providing appropriate infrastructure and delivering services, the less 'typical', and in some respects at least, the less useful they become.

Refreshing one or two panel members, on an annual basis may help to generate new ideas and perspectives. This would also be easier than attempting to replace the whole panel!

It is suggested that this is established at the beginning of the panel if possible, so that panel members are aware of, and involved in, any plans to alter the composition of the panel in the future.

3.6 How do we know our passenger panel is working?

It is the job of a representative to "represent" people. Passenger representatives can only effectively represent passengers if they tell them what they have done on their behalf and provide them with an opportunity to comment.

One way of doing this would be to dedicate part of your website to the panel's activities and/or to assign an email address to the panel, through which other passengers can share ideas.

It is also important that you work with the passenger panel to assess its effectiveness on a regular basis: you should ensure that the panel considers itself to be effective in terms of making a difference within the organisation and that you can demonstrate this effectiveness through the impact that the panel has had on the way that you operate.

Appendix 1: Fourteen Points of Best Practice – A checklist

Consumer Representation – Making it Work (Scottish Consumer Council)

1. Define a clear role
2. Decide how many representatives you need
3. Include a variety of viewpoints
4. Use a variety of recruitment methods
5. Communicate a purpose
6. Specify rights, powers and responsibilities
7. Clarify the commitment required
8. Give precise terms and conditions
9. Provide relevant training
10. Manage the flow of information
11. Have dedicated consumer budgets
12. Provide support for representative with special needs
13. Monitor effectiveness
14. Help representatives to be accountable

Case Study: Setting up a panel

Virgin Trains set up a passenger panel in April 2008. Following an inaugural meeting consisting of a tour of Euston and a presentation on the company, its aspirations and customer care ethic from Managing Director Chris Gibb, the panel agreed to meet quarterly.

The 15 panel members were recruited, following adverts in Virgin's onboard magazine 'Hotline', from over 300 applicants to ensure a broad spectrum in terms of age, reason for travel and geographical location (as far apart as the Isle of Bute in Scotland and London). Virgin specifically recruited so that all main parts of their network were covered including a passenger that travelled regularly to Wales. Panel members were given first class travel to and from meetings as well as overnight accommodation if it was needed.

Passenger Focus attended the second meeting in July 2008 to facilitate a workshop to assist in the development of the panel's terms of reference. The workshop looked at what the panel could offer Virgin, what they expected in return, how best to communicate and what they felt the meetings should focus on in order to make a difference for all Virgin passengers. It was decided that the all members able to input into the agenda setting.

The panel itself is managed by the Communications Manager although the Managing Director and all senior managers have attended at least one meeting to ensure their views are heard at the highest level. A passenger has chaired all meetings since 2008. Each meeting gives panel members an opportunity to discuss one good and one bad thing about their Virgin travel since the previous meeting. Answers to queries or reasons for particular issues are given where possible. The information is fed into the company and feedback given at the following meeting if no answer available on the day.

Interactive workshops are regularly held at meetings together with an opportunity to visit one of Virgin's or Network Rail's facilities. More recently, panel members were able to discuss and feed into the new West Coast franchise bid. A panel member was also selected (through a draw) to attend the dinner and present prizes at the Staff Feel Good Awards ceremony in April 2010.

As a result of feedback from the panel, Virgin Trains devised and upgraded the passenger information on the exterior of their trains. This provided greater clarity in allowing passengers to identify their 'coach' and also the facilities provided.

Panel member were also involved in a workshop at the start of the Passenger Information During Disruption (PIDD) project and incorporated the outputs from the workshop in responses as part of the Industry Review on passenger information during disruption.

Virgin Trains also set up a dedicated e mail address for panel members to use which is monitored by the Head of Customer Services. Passenger Focus has suggested that the

panel feedback to other passengers via the on board magazine and it is hoped this will be instigated by the panel in the near future.

Case study: Rejuvenating an existing panel

First Bristol's Customer Panel had existed for several years when, in August 2009, Passenger Focus was asked to assist in its rejuvenation. At this point, there were issues with organisational commitment and, having met separately with the panel members it was clear to Passenger Focus that the panel was not delivering what they wanted it to.

Passenger Focus, in order to provide the panel with new ideas about how it could refresh its format and objectives, arranged for two panel members to attend a meeting of a successful Customer Panel in the rail industry. This provided members with a comparison of how the panels were run and what could be achieved using different methods and ways of working.

Initially the panel, comprised of eight members (when all were in attendance), was recruited through adverts placed on buses and selected to represent a cross section of geographical areas in Bristol. In 2009, it was felt that the age range of panel members was not representative of First Bristol's passengers and as a result, the new Managing Director recruited two Youth Parliament members to the panel. As an incentive, panel members are provided with First (bus) monthly or annual travel passes.

After observing alternative ways of operating, the terms of reference of the panel were altered to improve its impact and effectiveness. The panel is now regularly attended by the Managing Director and Commercial Director: improving the flow of information and increasing the importance of the panel within First Bristol.

There are now fixed meeting dates (about every two months) to improve attendance and to ensure that the right information is available at meetings for panel members to be able to have informed discussions. Detailed agendas are prepared to give the meetings clear focus and, importantly, the notes of the meeting, with specific actions, are produced.

The refreshed Customer Panel has its own page on the website, where minutes are published and other passengers can contact the panel to share their opinions and ideas.

Success of the refreshed panel has been measured in terms of achieving a better dialogue, getting an increased passenger input and, crucially, exerting some influence on organisational decisions and processes.

The company has now shared detailed punctuality data with all panel members and a summary of complaints has been circulated. The panel has also contributed to discussions on the commercial impacts of the concession reimbursement changes. The panel itself was instrumental in the introduction of a new ticket which offered a better deal for passengers and helped to increase passenger numbers- benefitting both organisation and passengers!

One panel member commented that the refreshed panel meetings had been "much better than meetings previously attended."