

Board Paper	
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Report for	Decision <input type="checkbox"/> Information <input checked="" type="checkbox"/>
Restricted or confidential Information?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If confidential, protective marking ¹	
Date of Meeting	14 July 2010
Agenda Item	6
Report Title	Workplan report for May and June 2010
Sponsor	Anthony Smith
Author(s)	Management Team
Compiled by	Matt Ayson



1. Chief Executives Overview (Anthony Smith)

Passenger Focus' work in the last two months has focused on:

- The publication of the spring 2010 wave of the National Passenger Survey – over 25,000 passengers gave their opinion about the journeys they had just completed
- Preparation for the July publication of the first 14 areas of bus passenger satisfaction work
- The cancellation of the franchise competitions for the East Anglia and Essex Thameside franchises. Passenger Focus submissions have already been made and may require updating when (and if) the competitions are re-started
- Preparation for the forthcoming Department for Transport franchising consultation
- Input to the Department for Transport/Office of Rail Regulation value for money study

2. Research (Ian Wright)

Rail research

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
APRS Stakeholder SNAP survey (Quantitative) – survey circulated to disability organisations for their members to feedback their experience of APRS.	In house SNAP survey was designed and internet link was circulated to 7 disability organisations to forward onto their members	Passenger Focus Research team	1 June – 2 nd July	TBC	- Fieldwork currently in progress	Sultana

¹ ie RESTRICTED plus COMMERCIAL / POLICY / STAFF / PERSONAL PROTECT

APRS Wave 2 (Qualitative) – mystery shopping the national APRS system.	Undertake 90-100 return rail journeys across England, Wales and Scotland.	GfK NOP	24 th May - 15 th July 2010	September 2010	- Fieldwork in progress - Contacting TOCs for their booking details to compare their data with the mystery shoppers records.	Sultana
Birmingham New Street (Qualitative) – understanding passenger needs during the station redevelopment	6 focus groups	Outlook Research	Completed in January 2010	July 2010	Joint report launch with Network Rail (publication date to be confirmed)	Emma
Disruptions Research Panel	Developed bespoke panel to generate passenger comments on TOCs' handling of disruption	IPSOS MORI	Ongoing till end Nov 2010	Final report in Oct 10	- Internal report (June 2010) - Final report (Oct 2010)	Murray
East Coast timetable research (Quantitative) – route based research looking at passenger needs for the proposed timetable	On train survey on 1 route Achieved 948 responses	Continental	Fieldwork completed in March 2010	TBC	- Data available w/c 12 th April	Emma

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Greater Anglia franchise (Quantitative) – looking at passenger needs from the franchise	On-train/at station survey on 6 routes Total sample achieved – 3109 passengers	Continental	Fieldwork completed in January 2010	June	- Summary report published w/c 14 th of June - Paul Bentley putting together distribution list to circulate summary report	Emma
National Passenger Survey (Quantitative)	Mostly at station survey	Continental	Spring 10 survey completed before Easter	0930 on 22 nd June 2010	- Pre-release to PLMs and nominated TOC contacts (own TOC(s) only) went out on 1 st June 2010	David
Queuing times (Quantitative)	Assessing queuing times at Category B & C stations	GfK NOP	Feb/March 2010	Beginning July 2010	PLMs provided their 33 individual station reports. Also user guide developed for the PLM reports. - Developing report for publish date of Mid-July.	Murray

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Rolling Stock (Qualitative)	Rolling stock design for Scotland - 9 Focus Groups held in Glasgow/Edinburgh + in-depth interviews of disabled passengers.	MVA	W/C 12 April (1 in-depth interview outstanding)	Awaiting a final draft of the report and agreed publication date with Transport Scotland.	Results were fairly similar to those identified in the Thameslink research; though there seemed to be a greater expectation that a seat should be provided in Scotland. Things to come through from the focus groups included: safer standing areas, with more grab poles etc, improved luggage provision, and a welcoming of the flexible space provided by tip up seats in the new 380 design. Report is due to be published end of June 2010	Dan

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Rail Priorities research (Quantitative)	Self-completion questionnaires in 9 English governmental regions and Scotland and Wales	MVA	October 2009	Postponed publication date until further notice	Top 5 Priorities for improvement largely unchanged since 2007. Most significant change is the increased importance attached to increasing staff availability.	Dan
TVM Usability research (Qualitative) – Understand passengers' views about the usability of Ticket Vending Machines and indentify improvements that could be made	60 in-depth interviews split between 4 TOCs – SWT, EM, SE and EM. Respondents required to undertake ticket buying scenarios at the test TVMs	Outlook Research	March/April 2010	End of July	- Agency presented the initial findings on the 4 th of May. - Currently preparing the report for publication.	Sultana
TPE franchise (Quantitative) – looking at passenger needs from the franchise	On train survey on 3 routes Total sample achieved – 2917 passengers	Continental	Fieldwork completed in February/ March 2010	TBC	- Received data tables 26 March - Pre-spec report currently being drafted	Emma

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Three stations redevelopment (Quantitative)	On station self-completion questionnaires	Continental	Field work completed W/C 12 April	TBC	Findings were consistent with other work. Info, toilets and staff were seen as the most desirable attributes to have. Specific issues were identified at Clapham to do with congestion within the station, Security at Barking and poor access at Luton (footbridge seen as poor, and bus information nonexistent)	Dan
WCML RUS (Quantitative) - looking at passenger needs	6 routes, achieved 4106 responses	Continental	Nov/Dec 2009	July 2010	- Summary 4-pager to be published on website shortly	Emma
Welsh unstaffed stations research (Quantitative and Qualitative) – looking at passenger experience and security at unstaffed station	Boasted the NPS survey to achieve an 347 responses 4 focus groups	Glamorgan University	April - June	TBC	Draft report due July	Sultana

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NSIP Wave 2 (Quantitative – post wave monitoring NSIP programme with NR)	4 stations this summer, 4 more April 2011	Ipsos Mori	July /Sept. 2010 & April 2011	TBC	Dashboard after Sept., full report 2011	Dan
Passenger Attitudes to the Spending Review	4 groups with rail passengers in London and Manchester	Outlook	w/c 12 th July	Debrief 20 th July	TBC	Sultana
Train Performance and Customer satisfaction (modelling NPS and punctuality data for Cross country and Northern)	Modelling	CDL	n/a	TBC	Sharing results with TOCs and other stakeholders during July	David
West Midlands RUS (Quantitative) – looking at passenger needs from RUS	3 routes – to achieve 600 responses per route	Continental	September 2010	TBC	- results required for October 2010	Sultana/ Emma

Bus research

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Bus Mystery Traveller Survey (BMTS)	Mystery shopper assessments of factors associated with local bus travel	GFK NOP	2009-10 data collection complete. Starting Q1-2010/11 end April / early May	Published Annual results in May 2010	Annual 2009-10 report completed and on our website and ONS publications hub. Q1 fieldwork completed. Q2 fieldwork commencing.	Murray

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Bus Passenger Satisfaction Survey (BPSS) (Quantitative) – Continuous research programme, previously funded and managed by the Department for Transport. Passenger Focus has re-rendered the survey for a further 12 months (April 2010 to March 2011).	Face to face interviews with passengers alighting at bus stops/ interchanges across England (outside of London). A minimum sample of 2800 surveys per wave (four waves per annum).	GfK NOP	Fieldwork completed 24 th April – 14 th May Subsequent waves in July, October and January	September	- Data tables from the first wave received on 11 th of June - Looking to publish results in September 2010	Emma
Bus Satisfaction Survey (PF)	On bus issued self completion survey	Continental	November 2009 fieldwork complete	July 2010	Final publication date July 2010 Tender to be issued for next wave by end of month (see separate Board paper)	Murray

Type of research & objective	Methodology	Agency	Fieldwork	Report Published	Key findings/Next steps	Research Owner
Bus Services & Passenger Behaviour (Quantitative)	Omnibus survey with bus passengers in England outside of London. Achieved 518 responses. Topics covered included service changes, passenger info needs and passenger behaviour.	Ipsos MORI	Fieldwork completed 7 th -13 th May 2010	TBC	- Results used to inform Passenger Focus's response to the Dft consultation "Improving Bus Passenger Services through the regulatory framework" - Publishing service change findings July 2010, holding ASB findings to combine with separate ASB research later in year	Emma
Methodology review	Technical and end user review of bus satisfaction methodologies in partnership with the PTEs/pteg to ascertain feasibility of aligning	Richard Roberts-Miller	Consultations June/July	August 2010	Debrief to pteg DGs 14 th July, to be discussed at pteg Ops meeting September 2010	Ian/Murray
ASB (qual research to gain a greater understanding of Anti Social Behaviour on buses in the West Midlands, jointly with Centro)	TBC, but probably qual	TBC	September 2010	TBC	TBC	TBC

On the rail side, much of the first quarter of 2010/11 was taken up cascading the findings from the numerous projects undertaken in the previous quarter throughout the organisation and to external stakeholders. However, key new research included publication of NPS Spring Wave 2010, and commencing APRS Wave 2 and NSIP Wave 2.

Bus research really stepped up a gear, primarily in the form of our own Bus Satisfaction surveys, where the research team supported the bus team in presenting results to a large number of stakeholders. Much work also went into preparing these findings for publication. We also embarked upon a joint project with pteg and the PTEs to see how we could potentially harmonise our approaches to bus satisfaction research. Preliminary discussions with major bus operators and industry bodies were initiated to cover similar ground. We also announced our arrival in the bus sector by commissioning a piece of research that enabled us to give an evidence-driven response to a DfT consultation on Improving Bus Passenger Services.

3. Policy (Mike Hewitson)

We provided input to HLOS2 (High Level Output Specification). This included presenting emerging conclusions on our National Priorities and Punctuality research to DfT’s project steering group as well as discussing the metrics to be used in setting HLOS targets.

We worked with DfT on the implementation of the European Passenger Rights Directive and the ‘Better Stations’ project.

We helped develop and present the emerging findings on our research on queuing times and ticket vending machines to DfT franchising team, the DfT fares team and to the ORR ‘consumer protection’ team.

On the accessibility front we provided extensive input into the setting up of the APRS mystery shopping research (fieldwork scenarios and the ‘shopper’ training) and responded to DPPP consultations.

Work also began on our regular ‘T-12’ assessment (looking at the availability of Advance Purchase tickets travel over the August Bank holiday weekend).

4. Development Team (Benn Jones) (current workload)

Key workplan commitment	This period’s comments on progress / activities
Northern RUS Generation 2	We have continued to attend the Stakeholder Management Group. Gaps have been identified by attending sub- groups meetings to gain valuable insight of issues being discussed. Network Rail will be releasing the draft consultation document Autumn 2010.
Scotland RUS Generation 2	As above, we have maintained a presence on the Stakeholder Management Group meetings and the draft consultation document is expected to be released by Network Rail Autumn 2010.

Disruption Campaign	The online disruption panel research continues, with TOC disruption reports being followed up by relevant PLMs/PLEs. Our own mystery shopping survey of the Good Practice Guides and the ACOP PIDD (approved code of practice of passenger information during disruption) is currently being reviewed and finalised for release to the rest of the link team.
TPE Franchise	We are currently working on our draft response to include research carried out on the three TPE routes along with the latest NPS data. Anticipated submission to DfT late August 2010, but no project dates for this franchise have yet been released by DfT.
Rail Training	We have devised a Rail Training programme tailored to the organisations needs consisting of an introductory day (for staff not necessarily involved in rail day to day) to occur in July 2010 followed by four masterclass training days with the aim of developing further expertise, to occur quarterly from September 2010.
Bus Training	We have been working towards the final three day training session taking place from 30th June to 2nd July in Nottingham. The content has been refined significantly. We are now looking to organise a one day session in the Autumn for anyone who has not yet attended a session.
Bus Complaints Project	In the last period the project team has agreed the two pilot areas for the complaints review these are; South Yorkshire and Oxfordshire. The complaints review “toolkit” was finalised and sent to relevant industry bodies for comment, this consultation has now ended.
Station Of the Year Awards	The stations which the TOCs nominated were all assessed and the shortlist provided to National Rail Awards. PLMs have been asked to comment on the process and suggest improvements for next year.
TVM	Initial project planning has been undertaken for this secondary campaign.
Queuing Times	Meetings have been held with PLMs to deliver the research results for their TOCs
PAT/Project Relate	Another review of PAT complaints responses was carried out 26 May 2010, the draft report for this is underway.
Greater South East Rail User Conference	Assistance was provided for the co-ordination of this event. The event was a success and initial positive feedback was received.

Tracked indicators 2010-11	YTD
Rail passenger engagement	727
Bus passenger engagement	69

5. Passenger Advice Team (Gary Willott)

(Data based on April and May 2010 performance)

Ref	KPI	Target	This period	YTD	Flag
A10	Passengers satisfied with the service they have received	65%	87%	87%	

First Call took and dealt with a high number of calls on our behalf in this period, up to levels from before we set up an automated voice announcement to redirect appropriate callers to National Rail Enquiries.

Incoming appeals at 204 per month were down from the highs of February and March 2010, although not yet back to our steady-state level of around 180 per month. The team dealt with 456 appeals, ensuring that the number of outstanding cases continued to fall.

Enquiries were modest in this period, with about half asking for a detailed response on train company policies and services.

6. Communications (Amy Stockton)

We recently produced the National Passenger Survey ensuring distribution to all key stakeholders. This project involved a large media campaign (somewhat hampered by the emergency budget being unveiled on the same day). We wrote a number of media releases including national and regional editions. This was a successful campaign including 6 national stories, more than 21 regional, 10 radio interviews and a large number of trade titles– highlights include ITV, BBC website and You and Yours.

The web site development project is ongoing and will be launched this summer. The new site will fully integrate bus, coach and trams and ensure that all our work is represented and easy to access.

The annual report has been produced and is about to be laid. Rail passenger priorities and the work plan are also designed and printed and waiting for a publishing date.

We have also assisted in the move, producing postcards to advertise our move and reordering stationary including new business cards for the whole organisation.

7. Resources (Nigel Holden)

Successful appointment of three Development co-ordinators, the Senior research and project adviser and the Research and project adviser were completed in May. The announcement of the public sector recruitment freeze at the end of May means we have suspended recruitment for the

Communication Officer vacancy. However we have frontline vacancies in the Passenger Advice team where we are recruiting for two Interim Senior Passenger Advisers to cover for two staff on maternity leave and a reduction in the hours for another Senior Passenger Adviser.

Job specific induction and development workbooks have been put in place for all new staff to ensure new staff are quickly able to become effective in their roles.

The outputs from Staff Attitude Survey workshops with staff in June and an initial self-assessment for Investors in People will form the basis of the action plans to help improve our performance, meet the Investors in People standards and address areas for improvement identified by staff.

The move of our London office from Whittles House to Drummond Gate was successfully completed between 10 and 14 June which include moving our network servers offsite to a secure data centre with improved network resilience.

The audit of the Annual Report and Accounts for 2009-10 has been completed with an unqualified audit opinion.

The management accounts to 31 May 2010 showed expenditure of £936,000 for the first two months against a budget of £1,016,000 a favourable variance of 8%. The large variance is due to changes required to the budget profile as a result of staff recruitment and moves in May. The revisions to the budget profile will be reflected in the June accounts.

8. Corporate Services (Jon Carter)

The Corporate Services team delivered two successful members events and board meetings in Edinburgh and Birmingham in May and June respectively, an additional Audit Committee Meeting in June and two Management Team meetings in May and June. We continue to strengthen our governance procedures by reviewing business processes, risks and controls in greater depth interlinking them with business objectives. We are currently creating a guide to the Equality Act for all managers and teams. Matt Ayson has now joined the team (covering Sarah) and has taken over responsibility for the Board and Management Team meetings, business performance reporting and business continuity planning.