

Board meeting

15 June 2021

LONDON
TRAVELWATCH

London TravelWatch & Transport Focus collaboration agreement review

Agenda item: 6
LTW652
Drafted 01.06.21

Authors: Anthony Smith, Chief Executive and
Emma Gibson, Director

Summary

- In February 2020 LTW and Transport Focus formed a Partnership, formally recorded in a Collaboration Agreement, which was agreed by the Boards of Transport Focus and London TravelWatch and signed by both Chairs.
- A host of practical improvements have successfully been put in place including the transfer of the complaints handling to LTW and the IT, HR and finance functions to Transport Focus.
- The Partnership has also brought other benefits to transport users, sponsors and both parties: specifically extending the reach and influence of both organisations.
- All of this has been achieved in an unusual year: the Covid-19 pandemic, remote working, acute political sensitivity and LTW budget reductions.
- A number of issues may characterise the next stages of the development of the Partnership: including whether or not we will co-locate; more activities to allow the Boards to get to know each other better; policy issues arising from increased casework numbers; joint or complimentary bus campaign work and how the two organisations will work together on rail passenger representation after the Williams Review is released.

Recommendation

- The Boards of London TravelWatch and Transport Focus note the content of this report including the major achievements of the Partnership so far.
- Both Boards agree to continue the Partnership (subject to the proposed changes to the Collaboration Agreement) for the foreseeable future.

The original purpose and intent behind the partnership

It is worth setting out the original joint motivation behind the Partnership as set out in the Collaboration Agreement. The relevant text is set out in Annex One.

Evidence of change?

While anecdotal sponsor and stakeholder reaction has been very positive, Transport Focus will re-test this later this year with a Stakeholder Attitude Survey. This will complement the planned Staff Attitude Survey 2021 and provide more information. London TravelWatch will

test out the sentiment of our sponsors in a satisfaction survey planned for the Autumn, similar to last year's.

In the meantime, the hard evidence for the success of the Partnership can be found in the practical changes outlined below.

Practical changes and successes

The first year of the partnership has been characterised by a host of practical changes under the terms of the Collaboration Agreement. In particular:

- LTW now handles all of Transport Focus's 'appeal' complaints (including Freedom of Information and Data Protection Act requests) in addition to dealing with its own workload. This was a substantial change. LTW had to quickly learn and understand more about the train companies outside of its geographic area. In addition, the service level agreement between the two organisations in this sensitive area (a statutory duty for both organisations) had to be agreed, started up, monitored and is now being reviewed. A mark of the success of this transition is that passenger satisfaction for Transport Focus complaints handling remains good. Five of Transport Focus cases have been escalated beyond the casework team in the past 12 months. This is a much lower number than previous escalations and indicates a high level of satisfaction with the way the cases have been handled by the London TravelWatch casework team.
- Issues are now dealt with more efficiently and coherently regardless of how passengers have contacted us. An example of this is the issue with Railcards not being extended or refunded during the pandemic. We had 20-30 appeals on this between Transport Focus and LTW, and once the DfT made their decision, an email was drafted jointly by LTW and Transport Focus and sent to complainants. It was then used by Ventricea when contacted by further passengers on the same issue, rather than keeping them waiting.
- LTW now benefits from the outsourced contact handling service provided by Ventricea contracted to Transport Focus. This has allowed economies of scale, better access and a more consistent passenger experience. The 400+ phone calls received and dealt with by London TravelWatch on a quarterly basis (prior to Covid) are now handled by Ventricea. Now that Ventricea deal with cases on a nationwide basis, they can also take a more 'cross-boundary' approach between London and the rest of the country, which allows for a more efficient and seamless experience for passengers
- Human resources, IT and finance support is now provided to both organisations by Transport Focus. With more alignment and more efficiency for both organisations
- London TravelWatch saved just over £6,000 last year by moving their IT systems over to Transport Focus cloud- based system. These savings will be ongoing each year. As a result of the move LTW are now able to use Microsoft Teams which has brought huge benefits to LTW's ability to work as a team during the pandemic. Transport Focus and LTW colleagues can also now share and collaborate on joint documents and see each other's diaries, which has really helped with collaboration between the two organisations.
- Audit, internal audit and ARAC oversight gives an early indication the re-charging arrangements for these services is working satisfactorily.

Other partnership successes

Transport Focus and LTW have jointly and individually made more of a difference for transport users, benefited sponsors and helped each other in the following areas:

External

- Joint sponsorship or promotion for events/reports and letters leverages influence which makes us both look bigger and with a wider reach. Jointly branded webinars on future transport, Electric vehicles and Accessibility have exposed London TravelWatch to new audiences and Transport Focus have benefitted by being able to show a more joined up and truly Britain-wide voice on these issues
- Transport Focus work (insight in particular) has been effectively used in the London area for first time, for example, weekly Omnibus survey results have been used to drive media work by LTW. LTW conducted five times the number of radio interviews than in the previous year, and more than twice the number of TV interviews. We had more mentions in the Evening Standard than in the previous year and were also quoted in the Times for the first time. While not all of this success can be attributed to the use of the Omnibus Survey results, LTW took part in six LBC interviews directly relating to the Omnibus; had 3 quotes in the Daily Mail relating to Omnibus or Transport Focus's Transport User Panel research; and the London Omnibus results were mentioned in the Evening Standard 6 times.
- Being able to use the Omnibus and other insights relating to London has also changed the nature of LTW's relationship with our main stakeholder Transport for London. LTW now have more credibility with TfL because instead of being the passive recipient of occasional TfL insights, we have been able to present our own, independent data to them on a regular basis, which has allowed us to challenge them with our own evidence.
- London TravelWatch is now associated with a larger, Britain-wide organisation and is keyed into wider debates beyond London (for example, the EV webinar)
- Transport Focus more effectively represents all transport users as its reach is extended to London and its issues in a way that was not possible before (for example, work and influence on DfT Bus Strategy will be informed by the new London links)
- We are working much more effectively where our remits overlap – such as on rail issues, allowing more efficient use of resources (for example, a joint meeting and potential work about rail/platform gaps and ticket office closure requests)
- We now pool knowledge and information about transport developments/our own activities (for example, sharing information and planning about reports, releases and media activities)
- The partnership has been a key factor in underpinning the recent success of LTW. They have increased credibility and profile, in part due to being able to use a London cut of the Omnibus results with their stakeholders, media and sponsors. This benefits Transport Focus as well, demonstrating we are part of a successful family of organisations.

Internal

- There has been much greater staff contact between the two organisations, which has allowed us both to take a fresh look at how we represent transport users, learning from each other's approaches. There is a sense of constructive challenge between the two organisations
- Staff had opportunities to work on different issues/material with new colleagues
- As a result of better contact with Transport Focus, LTW have been able to conduct their first staff survey, have benefitted from insight work, advice on policy and on producing a risk register
- There has also been collaboration on staff training and development such as writing skills, media training and risk workshops as well as participating in 'Lunch and Learn'

- There has been a more coherent, joined up approach to staffing and management issues, including planning
- The Collaboration Agreement has stood up well: with initial estimates of resources relatively accurate
- The Internal Audit report also provided re-assurance
- Sponsors seem content that the arrangements are working.

Collaboration Agreement: proposed change to description of what Transport Focus provides to LTW chief executive

Following the success of the experience of the last year we propose the current Agreement is changed to read as follows:

'The Transport Focus chief executive will:

- Collaborate with LTW director and chair to ensure aims and principles of the Collaboration Agreement are met and regularly reviewed
- Act as the Accounting Officer for the LTW budget (however, the day-to-day management of the budget will be sub-delegated to the LTW director)
- Work to ensure individual and joint reputations of both organisations are boosted by the partnership
- Support, advise and coach, as requested and required on external relations, policy or insight issues
- Support, advise and direct, as appropriate, on management or financial issues.

What is the role of the LTW director's role on Transport Focus's Management Team?

Again, following the experience of the last year we propose the following is included in the Transport Focus Management Team terms of reference in which it says, the LTW director will:

- 'Help shape Transport Focus strategy/decision making to both maximise effectiveness and boost London TravelWatch reach, leveraging the partnership
- Help ensure Transport Focus and London TravelWatch are as aligned as necessary/possible in terms of external affairs/internal management – (so that we can jointly make more of a difference for transport users and deliver better value for sponsors/funders)
- The LTW Director role does not extend to collective decision making on individual projects/financial decisions'.

If asked, what is the message about the CEO/director relationship?

'Transport Focus and London TravelWatch work in close partnership for the benefit of transport users and our funders.

'Having a joint chief executive helps ensure the organisations have complimentary plans, boost efficiencies and increased leverage. London TravelWatch's Director leads the external relations and day to day management of the organisation.

'Common purpose is built up, but separate accountabilities are preserved by this arrangement, as the two organisations retain their individual Boards.'

Next steps?

The real test of the Partnership is whether stakeholders (including sponsors), our Boards and staff consider it has made a difference. Transport Focus is planning (possibly as part of gathering views around potential Rail White Paper reforms) to carry out a stakeholder survey before the summer. LTW carried out a limited survey with London Assembly members last year and will survey them again once new Members are settled in post May elections.

A fresh London TravelWatch and Transport Focus staff survey should also be carried out before the summer – over a year after the last one. This can include questions about the Partnership.

A formal review of the Collaboration Agreement, under the auspices of CARGO (Collaboration Agreement Review Group) is now largely complete. **The updated agreement is included in the Board papers pack for formal agreement.**

How will the Partnership develop now? Much will be driven by external events but some areas for future collaboration might focus on:

- The continuation of refining current processes and joint arrangements, including TF's Internal Audit report recommendations, via CARGO
- Bus passenger issues. LTW is planning a campaign around bus priority. Transport Focus will be heavily engaged in the roll out of the Bus Strategy. There might be synergies we can exploit.
- More cross team working – staff could work on issues for the other organisation – spreading knowledge and development opportunities
- Potential co-location is still a possibility.

Annex One: Collaboration Agreement and the joint intent

'Shared context and criteria for working together

'1.3.2 Both organisations share a common heritage in their origins as Regional Transport User Committees, and while geographic and modal remits differ, the common objective of both organisations is to act as independent representatives for transport users. Both are committed to consumer principles, independent research and public sector values. Together, this will ensure that advocacy is strongly grounded in evidenced based policy.

'1.3.3 Both Boards have agreed to take a pragmatic approach to the negotiations and to focus on outcomes. All wish to work together in a spirit of mutual co-operation and trust and believe that "the whole is greater than the sum of the parts". As such, there will be give and take as far as possible should there be any minor differences of approach, and negotiations will be conducted in a spirit of friendliness and goodwill.'

'Benefit to transport users across Great Britain

'1.3.2 Both organisations will become more effective, able to make more of a difference as knowledge, information, skills and resources are pooled – the 'marriage value' of the new relationship is considerable

'1.3.3 More joined up representation on issues affecting transport users across London and South East will benefit all users.

'1.3.4 Passengers from all over Great Britain need good, reliable links to and from London and the South East. Focusing and making user representation more effective will benefit all users. This also serves as a template for arrangements in other places. In this regard, Transport Focus has already set up two subsidiary companies, Transport Focus Scotland Limited and Transport Focus Wales Limited.

'1.3.5 Joined up representation will look, feel and sound more sensible and effective.'

'Benefit to sponsors, funders, Boards and staff

'1.3.6 Clearly visible evidence of making more of a difference for users

'1.3.7 More resource released for front line activities

'1.3.8 No major changes to underlying sponsorship, financial, legal or other arrangements

'1.3.9 Increased opportunities, range of activities and organisations for staff to work and engage with

'1.3.10 More joined up support for Boards, less duplication of activities and ability to take a more user focused view on issues across Great Britain'.