

# **SYMCA ENHANCED PARTNERSHIP FORUM**

## **BUS CUSTOMER CHARTER WORKSHOP SUMMARY**

**28<sup>TH</sup> SEPTEMBER 2022**

SYSTRA Reference 11131/13

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## **1. INTRODUCTION**

### **1.1 The workshop**

SYSTRA were commissioned by SYMCA to design and facilitate a deliberative workshop session with the members of the Enhanced Partnership Forum as part of their meeting on Wednesday 28<sup>th</sup> September 2022.

The workshop was intended as the first in a series of workshops with stakeholders, seeking to assist in the development of a customer charter for bus users in South Yorkshire.

The deliberative workshop ran for one and half hours, within a two hour meeting.

After a brief initial overview of the plan for the deliberative workshop, attendees split into two smaller breakout groups of approximately seven people. One group consisted of the forum members attending in person, while the other was formed of those attending online via Microsoft Teams. The groups included a mix of passenger and user group representatives, bus operators and business/institutional representatives.

Each of the breakout groups took part in two 30 minutes discussions led by a SYSTRA facilitator. The first discussion focused on participants' aspirations for a customer charter, while the second addressed how a charter could be made meaningful.

After the second breakout discussion, both groups were brought back together for a plenary session where a nominated representative from each group shared the key points from the discussions with the forum.

Breakout discussions were captured by facilitators on flip-charts during the workshop, and were audio-recorded to support production of an accurate written summary following the workshop.

### **1.2 This report**

This report summarises the key findings from the two breakout discussions, drawing out the key themes.



## 2. FINDINGS

### 2.1 Aspirations for the charter

#### 2.1.1 What should the charter seek to achieve?

- **Set expectations**
  - For customers – provide confidence that certain service levels will be met, generating trust in local bus services; and
  - For operators – accountability for meeting certain service levels, and consistency in what is expected across all operators.
- **Drive cultural change**
  - To facilitate a shift away from SYMCA and the bus operators being seen as the experts who know what is needed, to a situation where customers and user groups are involved in the process and their aspirations and needs are understood; and
  - Inclusivity and equality of opportunity to be embedded in operation decision-making
    - Provide a framework against which future SYMCA decisions are considered / reviewed – an overarching objective that SYMCA are working towards which decisions need to be compatible with.
- **Explain and clarify passenger rights**
  - Clearly set out passenger rights, particularly for those with mobility restrictions or other impairments; and
  - Educate passengers on these rights, such as in relation to wheelchair users legal right to wheelchair spaces, and set out how operators and drivers will resolve passenger disagreements around access to these spaces.
- **Promote bus use**
  - Support efforts to make bus peoples’ primary mode / mode of choice; and
  - Help to encourage new users onto buses / lapsed users back – launch of a charter is an opportunity to ‘sell’ bus services to the public by clearly outlining the offer.



## 2.1.2 What should the charter cover?

It was agreed that the primary focus of the charter should be to outline the expectations passengers should have for bus services.

### ○ Service quality

- Reliability;
  - Seen as single most important element within, and determinant of, service quality; and
  - Publish reliability statistics so performance can be viewed objectively by passengers – broken down by route, not just operator;
    - Will provide confidence for passengers that services will run as expected; and
    - Will demonstrate to non-users that bus is (generally) reliable.
- Frequency;
- Punctuality;
- Speed of services;
- Cost;
- Service changes;
  - Service changes likely to result in significant disruption (for instance, caused by major roadworks) should be proactively and widely communicated;
    - Across multiple media including on board buses – must not rely solely on social media / the internet;
    - Reasons for service changes should be outlined clearly; and
    - Advice on alternatives should also be provided.
  - Frequency/number of service changes should be limited; and
  - Lost/reduced services should be restored as soon as possible, if possible
- Connectivity with other modes;
- Times of day; and
- Physical infrastructure – quality of buses, bus stops etc.

## ○ User experience

- Accessibility;
  - Physical/mobility impaired (e.g. wheelchair access);
  - Commitment to uphold legal rights, for instance for wheelchair users and their access to dedicated on-bus spaces. Includes ensuring other passenger understand and respect these rights;
  - Cater for needs of a wide-range of sensory impairments (e.g. audio-visual stop announcements); and
  - Commitment to accommodate all users.
- Consistency in information provisions;
- Safety;
  - Of lone travellers (e.g. females travelling later at night);
    - Last bus should never be cancelled – could there be a ‘last bus guarantee’ (alternative provided if bus doesn’t run)?
  - Of cyclists and other road users.
- Cleanliness;
  - To encourage passenger return to buses post-Covid (follow the lead of rail);
- Handling of passenger queries and complaints;
  - To set out a clear process for complaining and a transparent and consistent process for how complaints will be dealt with;
  - Commitment that passengers should receive a response within fixed time frame from operators;
  - Establish consistent recompense methods across operators (e.g. financial or alternative transport guarantee); and
  - SYMCA monitoring;
    - Commitment for SYMCA to monitor how bus operators handle complaints, and address the wider issues raised in complaints; and
    - SYMCA to track complaints to check that they are resolved and support public to resolve issues where appropriate.



## ○ Performance monitoring

- SYMCA should commit to monitoring actively monitoring operator performance to inform service management and improvement;
  - Key service quality aspects, such as reliability; and
  - Operator handling of complaints;
    - To gain data on operator / route performance for use in decision-making around contract awards etc.; and
    - To better understand where key performance issues are.

## ○ Expectations of behaviour

- Driver behaviours;
  - Attitudes towards vulnerable bus users;
  - How drivers communicate issues / problems with service;
  - How driver handle disputes regarding space – i.e. wheelchair spaces; and
  - Training for drivers to ensure they understand their role / expectations of them with regard to passenger support.
- Passenger behaviours;
  - Young people in particular cited as a group where behaviour expectations needed to be clear; and
  - Parents with prams using the wheelchair spaces when a wheelchair user wants to board.

There was also interest in using the charter to outline SYMCA's strategic objectives for bus services.

## ○ Statement of long-term direction

- Statement of the 'vision' SYMCA has for bus services, so passengers understand the goals that SYMCA is trying to work towards. For example, this might be an aspiration to have the ability to centrally manage routes and timetabling.

## ○ Day-to-day collaboration and partnership working

- Statement about how SYMCA and key partners such as bus operators and local authorities will work together to make changes that will improve services, for instance managing congestion that delays buses, or parking the blocks roads.



## 2.2 Making the charter meaningful

### 2.2.1 What would make the charter meaningful to the public?

- **It must have clear, real-world purpose and relevance to passengers**
  - Address the major issues passengers complain about (reliability, punctuality and cost);
- **It must help hold operators to account – it must be seen ‘to have teeth’**
  - Ensure access to performance data;
    - Passengers must have access to clear data on key performance metrics. This should include data at individual route level. Overall network level data is not sufficiently meaningful; and
    - Data should be published annually.
  - Clear implications when charter commitments are not met;
    - Need for a clear action plan for how shortcomings will be addressed;
    - Redress for passengers;
      - Complaint process to be set out clearly;
      - Single channel for customer’s to make complaints; and
      - Need for flexibility in the form of response;
        - Financial compensation is not always appropriate (many users will not have paid (concessionary pass holders etc.)) or the best approach. Sometimes an explanation or apology can be more appropriate / preferred by passengers; and
        - While financial penalties provide a demonstrable consequence for operators, there are challenges and potential negative consequences;
          - Root cause of poor service might be outside of bus operators hands – roadworks / traffic incident causing delay etc.; and
          - Penalising operators could raise costs or make services commercially unviable.
  - Transparency regarding outcomes – reporting on complaints received and actions taken to address.





- **To serve as a tool to encourage service improvement**
  - Provides a framework for regular reflection on / discussion around performance, and a prompt for action;
    - Continual reporting against charter;
      - Need for metrics for assessing success – such as found in hospital charters, with targets and published results; and
      - Reporting needs to capture the issues that have arisen, but also document what was done to address them.
  - Encourages continual conversation between passengers, SYMCA, operators, community groups, businesses etc.

## 2.2.2 What form should the charter take?

- **Participants agreed that the charter should come in two forms:**
  - A one-page summary as the primary, public-facing version;
    - Concise;
    - Jargon-free / in plain-English;
    - A bullet point list of short statements; and
    - Be presented as an eye-catching poster.
  - A longer, more detailed document which fleshes out the detail of the commitments;
    - Primarily for a more technical audience (i.e. the Enhanced Partnership, SYMCA, operators), but
    - Also available to the public online.



## 2.2.3 How should the charter be presented to the public?

- **The one-page summary version should be shared / shown as widely as possible:**
  - Posters/leaflets
    - Display on all buses, and at all bus stops - lots of physical infrastructure across the network to put it on;
      - Get it in bus users' faces on buses as they travel so they can't miss it; and
      - Put on back of buses so car drivers see it too – will help aspiration of the charter attracting new / lapsed users to bus travel
    - Display in other public venues – bus interchanges, libraries, shopping centres etc.
  - Online
    - SYMCA and operators websites and social media;
    - Partners promote (i.e. retweet) through their media channels;
- **SYMCA must be proactive in sharing the charter**
  - Need to explain the charter's purpose clearly;
  - Run an advertising / communication campaign
    - Radio; and
    - Face-to-face engagement.
- **Branding**
  - Documentation should be branded/published by the Combined Authority, with a statement of support/endorsement from the Enhanced Partnership
    - Public are familiar with the Combined Authority – it will give the charter greater authority with the public.



## APPROVAL

Version	Name		Position	Date	Modifications
1	Author	Mark Denley	Principal Consultant	06/10/2022	
	Checked by	Bradley Goodsell	Principal Consultant	06/10/2022	
	Approved by	Carry Stephenson	Director	07/10/2022	

