

BEST

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RAIL

PAUL STEPHEN.

Trust offers a helping hand

The EWS Educational Trust has provided vital financial support to help creative talent going through further education. RICHARD CLINNICK learns more about the scheme from Chairman of the Trustees KEITH HELLER and Trustee GERRY SKELTON

The EWS Educational Trust is the perfect example of the railway not only looking after its own, but also looking to the future.

Its aim is to encourage talent and unlock potential, by providing a financial grant towards the cost of further education of people with close relatives who work (or who have worked) in the rail freight industry.

Discretionary grants (not loans) can be awarded to individuals seeking to pursue a qualification in higher education, to those with a sporting or artistic talent, or to those who may need help with specialist equipment or technical support (special access funding).

It started from the framework of shareholders who owned EWS Railway, before Deutsche Bahn bought the freight company. Tied into the business at the time of sale was an employee share option trust. Because the value didn't belong to DB, nor to EWS, the concept of a legacy provision was created.

And with that, the idea of the Trust and Education Trust was born. It also had to be proven that this was not a company benefit - it is open to the entire rail freight industry, not just those who work for DB or who previously worked for EWS.



“The goal is to use the funds so that the Trust helps individuals make a difference to society.”

Keith Heller,
Chairman of the Trustees, EWS Educational Trust



Rhiann Brown (centre) studied at Heriot Watt University, thanks to a grant from the Trust. EWS EDUCATIONAL TRUST.



British athlete Olivia Walker was supported by the Trust. EWS EDUCATIONAL TRUST.

Gerry Skelton, one of the Trustees, explains: “For example, you have Mendip Rail. They're not actually a rail operating company as you would expect, they don't compete with the likes of GB Railfreight, but they have a rail freight operator's licence.”

The Trust provides funds for a wide range of projects, including recently an Olympic Games squad member. How do people receive the money?

“We do a number of different forms of awareness,” says Skelton. “We have the website, we do direct mail shots - so anybody who is in the sector who is a beneficiary (either active or deferred) of the railway pension scheme.”

“We've contacted them twice - that goes directly to their home. That then gives them all the contact information, and gives them condensed information.”

An online application is then submitted to the Grants committee, which comprises a number of the trustees. The board of trustees are the financial stewards, who in turn uphold the investment fund and who take decisions on the mechanism by which the Trust manages, allocates and approve funding.

Skelton explains: “It breaks down into

a number of different schemes. You have educational excellence, sporting and artistic excellence, and individuals who have challenges - either physical or any other forms of impairment that those individuals may face. Then there are individuals who just want to have an opportunity to improve their life and capability.”

Is that through things such as university grants?

“Any kind of educational, artistic improvement. We've also funded an individual being trained as a male ballet dancer in Covent Garden.”

Skelton adds that before they were made aware of the Trust, the parents had applied to take out a second mortgage on their home to allow them to support their son.

Equally, individuals who have taken part at the Commonwealth Games have also been funded by the Trust. But it's not just sport.

“A young guy who has a first class honours degree from Manchester University and is qualifying as a doctor emailed us,” says Skelton. “We get individuals going through PhDs... individuals who are doing Masters.”

Former EWS Chief Executive Keith Heller, now Chairman of the Trustees, tells RAIL: “Probably 90% are secondary funding. We have these special access items, but more and more - given the public structure now - we're focusing on Masters and doctors.”

The money comes from funds that were left after the sale. The Trust has since invested and added to it. “Every year that has been incorporated. We've actually been in a situation where we've been giving away about £400,000-£800,000 a year,” says Skelton.

The concept started as a 20-year project, and should run to 2028 if all goes to plan. The Trust wants to spend the funds as wisely as possible by improving the level of applicant. How does it judge applications?

“We have sole discretion on what we rate awards on,” says Skelton. “So for someone who is going through an undergraduate, there's a methodology for making that application. There's information they need to demonstrate, and we would approach that in a particular fashion.”

“Individuals who are going on and doing particular post-graduate courses and qualifications, that's a little bit more open to evaluation based on what each individual is going to do to help society - what that will add in value in general terms.”

Heller says: “The goal is to use the funds so that the Trust helps individuals make a difference to society.”

Skelton adds: “These individuals, in many instances, would not normally be able to do so purely based on where they come from, or the educational challenges. So for people who are dyslexic, people with very particular technical supports, we've actually bought a lot of equipment - computer programmes, voice-only activation system - just to allow those individuals to have a chance of life. We've done a lot of things like that.”

Skelton explains that applicants are not means tested: “We take the application and value what that application can give to the individual and their earning prerogative about a job, or about what they would actually benefit from.”

However, the Trust does follow-up the individuals. He explains: “Undergraduates are a good example. They go and do their course, and they get a cheque from Year One. But to get that they have to demonstrate that they've actually been given a formal place. If they're claiming for financial support, they have to demonstrate

that they have a place in halls or they've signed a contract for a property. If there's travel, they have to demonstrate where they are staying or going to. So we do a lot of checking.”

“In Year Two that individual has the responsibility to get a letter from the university to confirm that they have passed Year One and entered Year Two, at which point the cheque will be approved. The same thing will happen in Year Three, Four or Five, depending on how many years they are doing.”

At no time does the EWS Educational Trust ever guarantee to make a payment, but it does consider all applications. And providing it meets what the Trust believes is acceptable criteria, then funding will be made available. There are two intakes for funding grants.

The Board operates voluntarily, so what does it get out of doing this work?

“We potentially get a new generation of citizens whom we hope will help, because they have been helped - a group of individuals who will come back into the rail freight industry



“You have educational excellence, sporting artistic excellence, and individuals who have challenges - either physical or any other forms of impairment that those individuals may face. Then there are individuals who just want to have an opportunity to improve their life and capability.”

Gerry Skelton, Trustee, EWS Educational Trust

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Do you have educational aspirations? Maybe sporting or creative talent?

The EWS Educational Trust may be able to help you achieve your goals. How? By offering you a financial grant, providing you meet certain criteria. To be eligible you must have a close relative who works or used to work for the UK rail freight industry.

DEADLINE FOR 2017 APPLICATIONS: 31 August 2017

If your Educational course has already started or you are applying for a Special Access, Sporting or Artistic grant make your application before 14 April 2017

Applications for the Exceptional Contribution Award must be submitted before 14 April 2017.

Scroll down to the next page

Encouraging talent... unlocking potential



and actually help the industry maintain and sustain its capability,” says Skelton.

Heller opens the floor to RAIL readers at this point. “We're interested in those kinds of ideas. The purpose of the charity is described, so if it fits within that criteria we would look at it.”

Adds Skelton: “If this lands on someone's doorstep and this someone is the son or daughter of Mr and Mrs Railwayman and woman, and they have a degree in engineering and they're interested in doing a doctorate in something, this might be something we can help them with.”

The Trust also receives help from those wishing to support the cause. Skelton tells RAIL: “We have trainee trustees. There is a guy who sent us a letter recently saying he is going to be based in London. He is going to be practising medicine, and he will be available to give back. That's what we would really like to try and develop, that sense of commitment.”

Is there much engagement from those who have benefited?

“We've done four focus groups and we've averaged about 24 people there,” says Skelton. “They came along voluntarily, gave us a day, gave us lots of good ideas, challenged us, and out of that came a lot of ideas for the new website.”

Heller calls it a journey “in terms of the recipients getting the fact that they should be seeing this as having an obligation to carry on”.

The Trust is trying to develop, potentially, a kind of alumni. It's looked at a LinkedIn group, but doesn't want to do too much social media with the likes of Facebook because of the difficulty in managing what is posted.

Says Skelton: “Having someone who is a 20-something going into a workplace somewhere, and talking about what they got from it - even if they are talking to people who are in their 50s or 60s, the fathers and the grandfathers - that's a powerful medium. “It gets around that there's no catch. People don't have to pay anything back!”

The EWS Educational Trust has helped people grow and develop, and wants to help more. Find out how at <http://ewseducationaltrust.co.uk/>. Deadline for applications is August 31 2017.

Passengers were put first... and so was LU

Transport Focus Chief Executive ANTHONY SMITH, the lead judge for RAIL's National Rail Awards Putting Passengers First Award, reveals why London Underground claimed the prize for its Customer Service Training Programme

**NATIONAL
RAIL
AWARDS**
**2016
PUTTING
PASSENGERS
FIRST**

Passengers want to see staff, and to talk to them when they need a bit of help - it's that simple! Transport Focus's research backs this up.

In addition, like many other industries, the railway is constantly being challenged to look at how it can be more efficient and make best use of its resources - one of its biggest resources being its staff.

In many of our research projects passengers have described the contribution that staff can have in making their journey experience a positive one. They are the human face of the railway. For those operators keen to improve passenger satisfaction, it is important to understand at which stages of the journey passengers value staff the most, and the contribution they want staff to make to their experience.

Transport Focus research into passenger aspirations and expectations has revealed a consistent message coming through about staff: passengers like and value having staff around. For example, in a series of focus groups carried out with Northern Rail passengers, frequent references were made to the varied assistance staff could provide,

and to the enhancement of feelings about personal security when there was a visible staff presence - particularly at smaller rural stations.

Passengers were also quick to point out the benefit to the operator of having a presence at stations, as it deters fare evasion. It was felt that even having one member of staff present for part of the day would make a genuine and positive difference.

Looking at our research as a whole, we can identify the following core areas where the presence and assistance provided by customer-facing staff is seen to be an essential part of the service passengers expect to receive:

- Ticket retailing.
- Revenue protection.
- Accessibility.
- Information provision, especially during disruption.
- Assistance, especially during disruption.
- Personal security.

We carried out a joint project with South West Trains (SWT) to understand why passengers were choosing to queue at ticket



Since 2012, 4,500 London Underground station staff have undergone a five-day learning programme in order to better assist passengers. TRANSPORT FOR LONDON.



Led by Aisha Tague, the team from Transport for London collects the National Rail Awards Putting Passengers First Award - for London Underground's Customer Service Training Programme - at London's Grosvenor House Hotel on September 22, from BBC Radio 4 presenter and NRA host Justin Webb (far left) and Stage Assistant Gabriella Lester (far right). PAUL BIGLAND/RAIL.

office windows, rather than use self-service ticket machines. The research revealed that the majority of those in ticket office queues could have bought their ticket from a ticket vending machine (TVM) and had actually done so in the past. Nine out of ten of those in ticket office queues were aware of TVMs at the station and 78% had used them in the past.

The results demonstrated that the conscious decision to purchase at ticket offices was often driven by:

- The purchaser's lack of confidence in using the machines.
- The purchaser's lack of confidence in their ability to select a ticket at the appropriate price with the necessary validity or relevant route (as specified on the ticket and reflected in the price).
- A preference for face-to-face transactions for reassurance.

While for many customers there was little objection to using TVMs in theory, any doubts about the details of which tickets are available, or the functionality of the machines, meant people reverted to the 'tried and tested' ticket office.

Personal security is also a factor. In trying to define which types of anti-social behaviour particularly concerned passengers, Transport Focus carried out joint research with the British Transport Police in 2010. This revealed the top three types of behaviour that worried passengers: abusive or threatening behaviour; theft of belongings; and people under the influence of alcohol or drugs. When asked what could allay some of those concerns, passengers consistently identified staff presence as the key.

London Underground's bold initiative to move staff onto the ticket concourse and make ticket machines more usable and accessible therefore clearly interested RAIL's National Rail Awards judges.

Three things impressed them. Firstly, the amount of planning that went into the Customer Service Training Programme, starting in 2012 with new Area Managers being appointed to lead the changes. Given staff and passenger sensitivities, this project had to be handled well. There was ample evidence of consultation, involvement and listening to and acting on feedback. The most

comprehensive training ever delivered by London Underground led to all operational and 4,500 station staff going on a five-day programme. As a result, 286 ticket offices were closed at 247 Tube stations - a huge change.

Secondly, the project could only succeed if the range of ticket types and payment methods had simplified sufficiently that more passengers would have the confidence to buy online or at the ticket machine. While the rapid growth of contactless payment has clearly helped this, LU did much work in advance to make the ticket range easy to understand and with a clear point of contact if things went wrong. Some 150 extra ticket machines were installed, software upgraded, eight Visitor Centres opened, new help points installed, and 4,500 iPads were given to staff - an impressive package.

Thirdly, listening to customer feedback. There was clear evidence that passenger satisfaction with both staff presence and the help they get from staff when they need it have both risen.

This is the sort of clear evidence of change that the NRA judges are looking for - scores for staff availability to help at ticket machines

has risen from 36% to 65%, as have scores for staff helpfulness. At the same time satisfaction with ticket-buying facilities has also risen and continues to rise.

Overall, this is an ambitious and large-scale project that should make a visible and palpable improvement for millions of passengers every day. Our colleagues at London TravelWatch are now carrying out an independent review for the Mayor of London to understand the customer impact of the ticket office closures, and to identify any areas where further action is still required. This project put passengers first and is a worthy winner. **R**

About the author

Anthony Smith, Transport Focus

Chief Executive of Transport Focus, Anthony is a qualified solicitor who worked for five years as principal consumer lawyer for the Consumers' Association. Prior to joining TF, he was deputy and acting director of ICSTIS, the regulator of premium rate phone services.



FIRST CLASS COLLABORATION

“United we stand, divided we fall” is a well-worn phrase extolling the virtues of working in partnership to achieve mutually held aims. It’s also a maxim to which Network Rail has increasingly subscribed, following 2011’s *Value for Money* report written by Sir Roy McNulty.

One of McNulty’s recommendations to improve pan-industry performance was taken up with particular enthusiasm by NR, in the form of alliancing.

Hitherto rarely seen in major infrastructure delivery and operation in the UK, this amounted to new partnerships and ways of joint working being formed between suppliers, with NR often being embedded as the client at the very heart of the project. This month’s Department for Transport (DfT) announcements regarding NR and East West Rail take the debate a big step further on.

By sharing project risks and benefits, McNulty established the principle that considerable cost and time savings could be delivered in large-scale projects simply by contractors with specific capabilities operating side by side, sharing core

PAUL STEPHEN talks to FCP Managing Director IAN HORSEMAN SEWELL, to find out why First Class Partnerships is more than just a company name

professional and management functions, and with aligned objectives.

This working arrangement has been successfully used in a number of high-profile enhancements and renewals in recent years - not least the Staffordshire Alliance on the West Coast Main Line and the Wessex Capacity Alliance, which is currently revamping Waterloo in an £800 million programme to deliver a 30% capacity increase at Britain’s busiest station by 2019.

This is where FCP steps in. For 20 years it has advised clients on all aspects of railway delivery operations, and it is increasingly specialising in facilitating the increased collaboration that alliancing necessitates from rail sector organisations. Where aligning behaviours and reducing conflict has not come naturally to individual businesses, FCP has been able to provide its expertise as an external (but authoritative) voice.

“We’re helping organisations to

understand where they are on the collaboration continuum, and then take them to a higher level,” says Managing Director Ian Horseman Sewell.

“We’ve chosen to focus on this area as it is very much at the top of the DfT’s agenda. If you look at the recent East Midlands franchise prospectus, collaboration is there from the ministerial foreword right to the final page.

“But to achieve the Government’s aspirations, all sorts of companies need to collaborate in different ways. We want to help make that happen.”

FCP starts this process with a comprehensive stock take/assessment, to gain an in-depth understanding of a company’s current situation, and then identifies what steps a business must take to ensure it is able to collaborate with others and meet Government, passenger and shareholder expectations.

Among the many criteria DfT expects from suppliers is that they meet the requirements set out in the Collaborative Business Relationships Standard BS 11000, with a view to seeking certification at a certain

date. NR also uses BS 11000 - as an external benchmark for its collaborative capability.

With many companies lacking the resources or expertise to complete this sort of self-assessment, speaking to an expert advisor such as FCP can often make the difference between collaboration plans being accepted or not.

“Very often, when a business seeks to change its behaviour, it takes someone from the outside looking,” adds Horseman Sewell. “We find that in the railways people often have their heads down on the very demanding day-to-day job, and it’s all very tactical, so we help people take a strategic view and then effect the changes that are needed.”

Of course, alliancing does not stop at infrastructure upgrades - different types of agreements will be needed for other parts of the railway. FCP is very much at the forefront of this expected rollout, as NR’s proposed devolution of decision-making

“As part of his December 6 announcements about the future of Network Rail, Secretary of State for Transport Chris Grayling criticised the status quo in many rail operations, with (as he put it to the BBC) “different companies, often talking different languages, doing different things, not speaking to each other properly, and throwing contracts around when things go wrong”. Grayling went on to say that his announcements were “all about....evolving a teamwork structure”.

to route level potentially allows for train operating companies (TOCs) to increasingly deliver other services.

This can be seen clearly on the Wessex route, where Network Rail and South West Trains established a joint senior management team to look after both rolling stock and track. Although the two remain separate entities, more integrated working has delivered benefits and there have been many lessons for future alliances, such as better planned engineering work and improvements to train punctuality.

“To devolve 90% of NR’s expenditure to

route level should be a recipe for greater collaboration with TOCs, which will in turn open the door to new models of franchising in the coming years,” says Horseman Sewell. “However, to achieve this collaboration requires a whole system understanding of how the railway operates.

“This whole system understanding is what we offer, drawing on our experience consistently delivering successful outcomes for government, operators, financial institutions, regulators, investors, equipment manufacturers and contractors.”

FCP is also increasingly leading and supporting the development of other forms of collaboration beyond conventional alliancing, and Horseman Sewell is expecting to see a number of new models emerge. Although specific variables such as cost reduction can be measured, actual levels of collaboration between organisations have traditionally been difficult to quantify. Horseman Sewell therefore describes what success will look like.

“Alliancing is an example of collaboration, not the other way around,” he concludes.

“We’re not just talking about traditional B2B or B2G [Business to Government] alliancing either. We also see third sector organisations involved if this is done properly. I can see local public sector bodies or third sector organisations putting together funding for enhancements that are not currently near the top of NR’s wish list, and then alliancing themselves with contractors.

“The visible impacts of closer collaboration will include greater co-location and clusters of suppliers, greater transparency between businesses such as data sharing, and more creative procurement models. You might, for example, start seeing a greater operation of track maintenance equipment by the TOCs taking over completely from NR. We will play our part in seeing this happen and we wholeheartedly welcome the Government’s new thinking about Network Rail’s future.” ■

On November 24, workers from the Wessex Capacity Alliance carry out trackwork at the throat of Waterloo, required to bring the five platforms within the former Waterloo International Terminal back into use next August. FCP is aiding increased collaboration with Network Rail and its supply chain. PAUL STEPHEN.



“We help people take a strategic view and then effect the changes that are needed.”

Ian Horseman Sewell, Managing Director, FCP



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