

APPENDIX 3: CUSTOMER AND OPERATIONS

Report by the Customer Service and Operations Director

January 2016

1.0 GENERAL

We have recruited an interim Head of Customer Experience, Carron Smith, who joined the Trust on the 4th January to lead our relationship with Moneypenny to develop and implement improvements to operational customer journeys.

2.0 BOATING

2.1 General

Mike Grimes and members of the boating management team continue to meet with members of our boating community as part of their ongoing commitment to improve face to face engagement with boaters. This included presenting at the APCO annual general meeting in York to some 70 business boating customers.

The first boating management team live web chat with customers is planned for early 2016 giving boaters a chance to ask questions 'real time'. It is hoped this will become a regular feature for boaters in 2016.

2.2 Winter Moorings

Winter mooring sales have delivered revenues of **Commercially confidential material removed** with sales across 103 sites. The offer this year has been well received by the majority of boaters purchasing a winter mooring and work is now underway to consider how an improved offer can be launched next winter.

2.3 **Commercially confidential material removed**

Commercially confidential material removed

The first quarterly communication regarding monitoring stats for those without a home mooring (continuous cruisers) has been published on our website.

2.4 Business Boating

The recruitment process within the business boating department has now concluded with all vacancies filled by both external and internal candidates. This recruitment will further strengthen the team and allow an improved customer proposition to be offered along with commercial benefit.

The roving traders associations held their Christmas market event 11th to 13th December in Birmingham. This was the last of a successful season of floating markets across the network with another full programme planned in 2016.

3.0 CUSTOMER SERVICE PROJECTS

3.1 Share the Space, Drop your Pace Report

Planning workshops have taken place in each of the Waterways to inform localised and targeted campaigns in their areas, supported by the project team with implementation plans due for submission in mid-January.

The first of a series of Twitter Q&As has taken place, with Dick Vincent answering general questions and local concerns, and highlighting the campaign's objectives and messages.

Bespoke maplets are being developed for each area and will support the campaign messages.

3.2 Management Plans for Trust Destinations

The first tranche of contracts have been awarded whereby external consultants will produce development plans with detailed action & delivery plans for 7 Trust sites by the end of March 2016. These sites are:

- Anderton Boat Lift (NW&B)
- Audlum (NW&B)
- Standedge Visitor Centre (M&P)
- Foxton Locks (SE)
- Stoke Bruerne (SE)
- Leigh (NW)
- Bingley 5 Rise Locks (NW)

Following the Visit England guidelines, the consultants will work with stakeholders to look at 5 key areas. The output of this work for each site will be a management plan that considers actions to increase footfall, improvements to the customer experience, opportunities to deliver increased revenue.

By appointing a variety of consultants – from national to locally based small companies – across a variety of destinations, we will develop a robust framework & model for the next tranche of management plans across other destinations in 2016 / 17.

3.3 Online Booking Systems

We are currently working with the IT company Gamma to move 7 waterway paper-based booking processes to an automated online system. The 7 locations are:

- Ribble Link (NW)
- Liverpool Link (NW)
- Standedge Tunnel (M&P)
- Frankton Locks (NW&B)
- Wigan Dry Dock (NW)

3.4 Money Penny – Call Centre Customer Service

November saw another seasonal reduction in call and e-mail volume, though total number of enquiries remains higher, at 30% more enquiries than during November 2014. As outlined in the business plan, we have reduced headcount in the team by one full time employee. Service levels continue to meet the agreed standards. More in-depth analysis and categorisation of licence renewal calls is currently being conducted to give greater insight into the reason why so many people chose to call instead of renewing online. More generally, we are taking advantage of a reduction in the number of enquiries to arrange experience days for the team and refresh their knowledge and training.

4.0 MUSEUMS

4.1 Marketing

4.1.1 Rebrand

The National Waterways Museum, Ellesmere Port and the Gloucester Waterways Museum both have separate brand identities that are inconsistent and not aligned with the CRT branding. We are looking to develop an identity for the National Waterways Museum – Ellesmere Port & Gloucester that sits comfortably within an overarching CRT branding style. A tender invite to develop options for moving forward has been produced by the Museums Marketing Manager and the Head of Marketing for CRT and will be issued shortly.

4.1.2 Market Research

The Museum Marketing Manager has also been leading on an audience development programme which starts with market research of our current audiences. Working with the Audience Agency (an Arts Sector Audience development Company) postcode data has been collected and visitor surveys conducted at both sites. The objective is to identify who our current – and potential – audiences are, and to target these more effectively. Our aim is to grow our audiences from the current 30K visitors to 150K visitors per site per annum.

4.1.3 Collections and Archives

The Museums have been successful in securing Esmee Fairbairn Collections Fund money to review our boat collection (some 73 boats) and to recommendations for their short, middle and long term future. Two consultants, Emma Chaplin and Rachel Mulhearn, have been appointed and they come with much experience in this area. Emma is a former Keeper of Collections for the Waterways Trust, whilst Rachel was previously Keeper of the Merseyside Maritime Museum.

5.0 PARTNERSHIPS

The Waterway Partnership Chairs had their first forum meeting, which took place prior to the regular meeting between CRT and the Chairs held in November. A number of items for future discussion have been identified including:

- Sharing and Communication between Chairs
- Sharing and communication between waterways managers
- Sharing project ideas and developments
- Partnerships' Make-up and Community Engagement
- Role of chair vis-a-vis waterways manager
- CRT PR
- Integrated plan for the whole waterway territory
- Attitude of CRT departments to partnerships

A further meeting of the Partnership Chairs is being planned for later January with Ian Rogers attending from CRT.

6.0 WATERWAYS

Handover of the Waterway Management teams from Vince Moran to Ian Rogers took place over November and December with formal responsibility beginning from January 2016.

Key areas of focus in the immediate future include:

- Clarity of the Waterway Managers role, alignment with the partnership and partnership chairs, and clarity around the new Development and Engagement Manager role
- Review the existing approach to measurement and KPIs
- Reporting on performance to the Trustees, the exec', and other colleagues.

7.0 VOLUNTEERING

7.1 With just under **346,000** hours recorded to the end of December the number of volunteer hours is slightly behind plan (whole year target **475,000**). Volunteer Satisfaction is 89% (those willing to recommend their experience).

7.2 Community Adoptions numbers now exceed this year's target of 125, with 131 adoptions in place at the end of December.

7.3 Employee Volunteering

Since April 2015 employers from 21 different companies have participated in our employee volunteering offers and their employees teams have gifted nearly 2200 days of their time. **Commercially confidential material removed**

After 6 months planning and discussion, Bank of America Merrill Lynch have agreed to a 2 year partnership in North Wales and Border Counties. The relationship will ensure 160 employees participating in a volunteering experience with us over 6 events in each year, and generate a donation of **Commercially confidential material removed** to the Trust (in addition to the **Commercially confidential material removed** donation in 2015).

7.4 Volunteer Recognition

The Trust operates a range of volunteer recognition methods, ranging from a simple thank you to a more sophisticated award system for adoption groups. During 2015 we have been rolling out a new system involving small gifts recognising volunteer long

service. This system started in September of this year and to date the following numbers of volunteers have received recognition of their sustained contributions;

- Mugs (and tea bags) >100 hours – 489 volunteers have received these
- Bronze Lapel Pin >500 hours – 277 volunteers have received these
- Silver Lapel Pin >1000 hours – 117 volunteers have received these
- Gold Lapel Pin >2000 hours – 16 volunteers have received these

The response from both managers and volunteers to this new system has been incredibly positive and our lapel pins are being worn with a great sense of pride by volunteers.

7.5 Volunteering Journey Research

Experienced consultant Lynn Blackadder has been appointed to facilitate the initial research needed to understand the 'health' of our Volunteer Journey – an initiative aiming to identify the key areas of priority for us to improve the volunteer experience and schedule actions over the next five years. Lynne has worked for National Trust, Scottish Arts Council, Imperial War Museum and the National Maritime Museum. Telephone interviews with Trust employees and volunteers are now underway. This is the first stage of the development of a comprehensive volunteering strategy which will ensure extensive growth and maximum impact of our volunteers. This initial research will be complete by end February 2016.

- 7.6 A knowledge exchange event was held in Birmingham in November for 30 community group representatives, all involved in the Waterway Adoption scheme. Jointly organised in partnership with Coventry University, with funding from the Economic and Social Research Council, the event aimed to gather views on the scheme and is part of the wider 'Volunteer Journey' research. Early feedback is that groups feel like they could contribute more if they were involved earlier in the planning stages of work. Overall very positive feedback on our management of the scheme and volunteer groups and lots of reported benefits on health, wellbeing etc.

7.7 Volunteer Lock Keepers 2016

Work is underway redesigning and improving the volunteer induction and training package in time for the 2016 intake of Volunteer Lock Keepers in the spring. In particular improvements to the safety training offered will be made and new elements incorporated to ensure our volunteers have a good understanding of Trust values & aspirations.

8.0 EDUCATION & INTERPRETATION

8.1 Number of children involved in activities to end December 33,174. Target for this year is 50,000. The education team have experienced some staff illness and an unexpected resignation and this has had a negative impact on numbers of school visits. However the team are confident, and have plans in place, to recover from this in the spring and meet the ambitious target set for the year.

8.2 Sandford Award

Bingley Five Rise Locks, Foxton Locks and the National Waterways Museum have earned the prestigious Sandford Award. Education staff and volunteer collected their well-deserved at a Sandford Award Ceremony at the London Transport Museum in December.



8.3 New Team of Explorers in Burnley

A new team of Explorers volunteers has been recruited and trained in Burnley. The team of five have 8 water safety assemblies booked for January and will be looking to book further assemblies and Build a Canal sessions in the New Year. Education resources specific to Burnley have been developed including a local Build a Canal set, handling items, loan box for schools and a canal trail.

8.4 Canal Fish Schools Week in Coventry

Over 100 children took part in our two day joint venture with the Angling Team in October. Each class took part in an angling taster session led by a local youth coach, an Explorers guided walk of Coventry Basin, a habitats activity and our water safety 'Spot the Hazards' activity. Many of the children had never visited a canal before and were amazed by the number of fish species found in the canal.

8.5 Royal Wolverhampton School Visit their Local Lock Stoppage

Three classes from Kings Albans School braced the weather with waterproofs and wellies to see their local lock de-watered. They investigated a number of artefacts found in the lock, including coins, old bottles, pottery, boater's windlasses and even bullets from the war.



Explorers' volunteers John Nelson and Gill Hellings met each class at school to lead our Water Safety and Build a Canal activities, followed by a guided walk along the canal to see the lock stoppage. Simon Turner and his team led the children through the lock chamber explaining the canals original use for carrying cargo by boat and the reason for present maintenance works to the lock itself.

8.6 Peak Forest Tramway Archaeology and Open Day



Recent research carried out for our project discovered that Benjamin Outram's Peak Forest Tramway site in Marple is of Regional Historical Significance. We ran a very successful community archaeology dig at the site to discover what remained from 19th to 30th October. Week 1 saw 180 primary school children from the local area and across Stockport attend to dig, including a class from Cale Green Primary School, who have an average of 31% of their children in receipt of Pupil Premium, which is above the national average.

Across both weeks we've had a total of 57 volunteers. 26 adults and 24 children came for one day, and 7 adults (including 2 young people) volunteered throughout the weeks, clocking up 30 days of volunteering between them.

On Sunday 1st November we welcomed 100 visitors to our Open Day, with finds, activities, digging, and guided tours of the dig, including a visit from 'George Ashton' a Lime burner, working and living in Oldknow's Marple Lime Kilns in 1851.

8.7 The New Navvies: Roadshow and Film Show Success



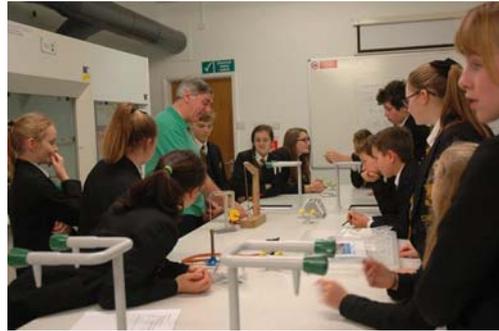
In 1965, the Peak Forest Canal Society produced a film called *The New Navvies*, a campaign film showing the possibilities of canals as leisure destinations and promoting the work of volunteers to save them. It made it all the way to Westminster! On November 28th 2015, 50 years later, with support from the film maker who lives locally, we screened this film at Marple Library, and 72 people from across the North West came to view it. We also received donations of items for our online archive and gathered memories to create a base for our future oral histories project.

8.8 Museum Takeover Day at National Waterways Museum



On 20th November we took part in Museum Takeover Day. This is an initiative which was started by the charity Kids in Museums. It is an annual event on which museums, galleries and arts organisations invite young people in for the day and give them a meaningful role. Children make decisions and get involved in the life of the organisation. It is a great way for the museum to build our profile locally and nationally through traditional and social media coverage as well as strengthening community partnerships. This day launched our campaign to keep our local schools and communities engaged with the museum during the winter closure. We have worked really closely with museum staff from other departments to put the day together. Pupils worked with our archive, collections, management and boatyard teams; taking on real jobs and effectively running the museum!

8.9 STEM and Rolls Royce Partnership



Working in partnership with Rolls Royce graduate programme, the team have trialled their new STEM programme (Science, Technology, Engineering and Mathematics) in schools. STEM is a key part of the new curriculum so the team have created a programme which will complement what schools, particularly secondary, are teaching in the classroom. The programme consists of five STEM related activities, all of which have been designed by Rolls Royce graduates. They focus around erosion, water pollution, water pressure, gaging and a SCADA game. These have now been trialled, tweaked and given the seal of approval from secondary school students across the midlands.

9.0 YOUTH ENGAGEMENT

The newly appointed central youth team are underway **Commercially confidential material removed**

Following a successful meeting with Duke of Edinburgh Award in Windsor, the Trust to become an approved activity provider for the Award. **Commercially confidential material removed** .

9.1 Youth Safeguarding Training

A learning programme to increase the confidence and capability of Trust staff to engage young people safely and effectively has now been developed and will be ready for launch in January 2016. The blended programme of e-learning and face to face workshops aims to increase the confidence and capability of Trust staff to engage young people safely and effectively. The e-learning package, which includes short video bogs from a range of Trust employees, is capable of being viewed and used by all volunteers and staff.

9.2 The Desmond Family Coast to Coast Canoe Trail - Leeds Liverpool Canal

This five year **Commercially confidential material removed** youth engagement project is progressing well and is on target to achieve ambitious targets by the end its first year (end Dec 2015). Recent activities included the continuation of canoe build sessions and a number of youth social action days, in addition to a 'Santa' event in December. The project has generated a significant amount of local press interest and coverage including from BBC Inside Out which will be running a 20 minute feature on the project in the New Year.



9.3 Uprising / SLYNCS

Our partnership with this well-established youth organisation in Burnley ends in December 2015. In total 110 young people (exceeding the target of 90) have participated over the 12 months of the project. Examples of the types of youth-led environmental social action projects carried out include;

- Being trained as peer facilitators by the Trust's Education Team and delivering the "build a canal" workshop in schools and youth groups across Blackburn with Darwen
- Designing an artist's brief working alongside the Super Slow Way team to recruit for artists to work on them on issues relating to their communities and the canal
- Carrying out a range of practical activities by the canal all year round through a Canal Adoption.

9.4 Construction Youth Trust

A pilot youth project in partnership with the Construction Youth Trust took place in London over 3 days in November. The project aimed to test a new model of youth engagement and aimed to broaden young people's understanding of STEM career opportunities, whilst at the same time giving them the opportunity to view a major lock stoppage and meet Trust employees/experts on site. The project went well with 10 young people completing the three days STEM awareness course and meeting a range of Trust employees from the engineering, heritage, project management and community engagement teams. A second project will be delivered with CYT in 2016. Once this is complete consideration will be given to a national project which the Trust and CYT will jointly seek funding for.

9.5 Construction Youth Trust

The dates for the pilot partnership with the Construction Youth Trust have now been confirmed for November 2015 to coincide with planned winter works. CYT staff are working with the Trust's Youth, Volunteering, Project Management and Engineering teams to develop the detail of the 3 day youth STEM educational programme, linking to our maintenance works.

10.0 FISHERIES MANAGEMENT

10.1 CRT/Angling Trust Canal Pairs Championships

Details of the 15 heats for the 2016 events were announced in December. Waterway managers have been given advance heads up. There will be a qualifying heat on each waterway and heats Wales (Llangollen Canal, Ireland (Grand Canal) and Scotland (Forth & Clyde), and a heat on a non-Trust owned canal (Basingstoke). The final will be held on 29th October 2016 on the Staffs/Worcester Canal.

10.2 CRT/AT Junior Championships

The match was held on 24th October on the Birmingham & Fazeley, running alongside the pairs championship, at which 23 young people participated. The event has attracted good angling press coverage.

10.3 Other Angling Development Initiatives

Central Shires family fishing funday at Burton on Trent was held in September, organised by a local stakeholder group arising from the fisheries and angling action plan consultation. The Trust supported and guided the stakeholders to deliver this family focussed event saw great success with over 70 people taking part and twenty pairs in the little family match encouraging families to enjoy fishing together.

Schools week in Coventry was a great success introducing over 150 children in a very urban area to fish, fishing and water safety messages. Our first time in Coventry worked so well with such great feedback that we are planning the same again next year.

10.4 Fisheries Management Update

It's been a busy few months for the Fisheries Management team being involved in 22 separate fish rescue and movement events, prompted by our maintenance and engineering programme, rescuing 19,084 lbs of fish with the help of our term contractor.

Ian Rogers
Customer Service and Operations Director