



WEST SOMERSET RAILWAY PLC

CORPORATE PLAN

2018 – 2023

Consultation Draft Version

West Somerset Railway Mission Statement

Our mission is to be the safest and most successful heritage railway in Britain, ensuring that the railway can be sustained and develop in the long term.

To achieve this mission, we have identified eight components. These are to:

- 1. Operate the railway safely**
- 2. Ensure our finances systems are robust**
- 3. Maintain and renew the infrastructure and property**
- 4. Enhance our locomotives and rolling stock**
- 5. Retain and build our workforce, both volunteer and paid**
- 6. Increase passenger service revenue**
- 7. Develop the heritage and educational aspects of the railway**
- 8. Build relationships with internal and external partners**

We will do all of this always with safety at the forefront and in compliance with all legislation and regulations.

These components are developed more fully in the following pages.

The consultation on this document will run from Saturday 24th February until Saturday 7th April 2018.

Responses should be sent to:

By post to: Corporate Plan Response
West Somerset Railway
The Railway Station
Minehead
TA24 5BG

By e-mail (after 24th February) to: consultation@wsrail.net

Introduction

This is the Consultation Draft Version of the West Somerset Railway Corporate Plan 2018 - 2023. The purpose of this document is to set out various ideas and to seek responses. Only after all the responses have been collated will the final version of the plan be completed.

The last Corporate Plan was written in 2013, to run from 2014 – 2023. Since 2013 much has changed both on the railway, and in the prevailing circumstances. What was perhaps not fully anticipated were the organisational and structural challenges presented by a successful and growing railway business. Also, income has not grown over the last few years as fast as might have been expected, which has put a significant strain on development.

The 2014 – 2023 Plan was very extensive, and not only proposed the way forward but also gave considerable detail about the history and the then current situation. The present plan does not repeat this. We have however worked through the 2014 – 2023 plan in detail and, in particular, reviewed the Strategic Statements that were defined in that plan. Having done that it was decided to start the present plan on a new basis, in the sense that priorities have changed since 2013, and the new plan needs to reflect that in the way that it is organised. We have identified what needs to be done to achieve the railway's mission and built down from that. Whatever we do must feedback ultimately to the mission.

Corporate Plans are expected to contain targets or aims. It is usually the case that these are refined in more detail in annual or bi-annual Business Plans. This plan is no different, but it is important to bear in mind that some features of a successful developing organisation are difficult to encapsulate in targets. The fact that some aspect of a growing organisation cannot be encapsulated in a target does not necessarily mean that it is not important. This is particularly the case with attitudes and professional and personal relations.

The West Somerset Railway is, without argument, a business but it is important to remember all the time that it is not *only* a business. Our over 1000 active volunteers do not volunteer because it is a business, but because it is something on which they want to spend their time. To spend time doing something you do not get paid for, means that you have to enjoy doing it, and find it rewarding in other ways. Being set targets with which you have only a limited interest is not going to engender enthusiasm. However, being part of a highly successful organisation does encourage positive participation. Thus an overriding objective must be that the railway is successful and highly regarded.

Paradoxically, although the business is a heritage railway (with a historic basis) we must look forward and anticipate what it will be like in the future. The railway has to reflect – and demonstrate – the features of a historic steam railway, but all the time this involves some compromise. Our customers, increasingly, have no memory of a working steam railway, and expect modern tourism standards. On the other hand, those of us offering the service, do not want the railway simply to be a weak pastiche of the 1950s and 1960s steam railway. This is a very difficult balance to achieve, but taken as a whole is the criterion by which the effectiveness of the Corporate Plan must be judged.

Ian Coleby
Chairman (on behalf of the West Somerset Railway Board)
19th February 2013

1. Operate the railway safely

The safe operation of trains is the central function on the railway. Whilst this is in essence routine it requires development, monitoring and review to ensure it effectively carried out. Railways operate in a complex regulatory environment. It is critical that the West Somerset Railway not only adheres to the various regulations, but by its operation demonstrates that it is a leading example of a safely operated heritage railway. The operation of trains is the most significant activity of trained and qualified staff. The effective training and assessment of staff is therefore central to a safe railway.

A key element in railway accidents is staff fatigue and the railway needs to develop an effective system of monitoring potential fatigue and developing mitigation strategies.

1.1 Our Aim: To ensure safe operation of the railway

Timescale: Immediate and ongoing

We will do this by:

- Continuing the engagement of an external consultant to maintain a regular overview of safety compliance on the railway
- Ensuring that all of our staff are properly trained and are competent for the jobs they do.
- Ensuring that we have an appropriate and robust safety management system
- Ensure that we audit our own performance and encourage external audits
- Continuing to enhance our learning culture so that we gain from incidents
- Ensure there is a nominated Safety Officer employed on the railway
- Ensure that the officers responsible for safety on the railway have frequent refreshing of training themselves
- Regular reporting to the Board of matters relating to safety including reporting of incidents
- Improving monitoring of working hours and rest breaks to ensure fatigue monitoring
- Adjusting working time, where necessary, to minimise fatigue
- Ensure that safety is a key agenda item at all Board and Executive Team meetings

2. Ensure our financial systems are robust

Passenger revenue can only cover a proportion of the money we need to spend to maintain and develop the railway. In particular, rebuilding and overhauling steam locomotives and repair of track and the formation can take 6-figure sums that cannot be wholly funded out of revenue. We need to ensure that we manage the funds we do have very carefully, that we live within our means and that we raise the larger sums required from other sources.

2.1 Our Aim: To ensure that the day to day management of our money is robust

Timescale: We will continue to develop this during 2018

We will achieve our aim by:

- Reviewing our current financial management and ensuring it is fit for purpose
- Developing a five-year cash flow projection and monitoring this
- Building clear financial monitoring and reporting tools
- Ensuring that we have appropriate approvals processes in place for expenditure, including a specific system for appointment approvals
- Working with budget holders to ensure they work within their budgets
- Building a robust budget setting regime
- Building systems so that we understand the full costs of our services and activities

2.2 Our Aim: To raise funds by a share issue and in other ways

Timescale: We will plan this in early 2018 and launch in September 2018

We will achieve our aim by:

- Communicating more often with our shareholders
- Identifying a small group of Directors to lead on the programme and to
 - Identify and agree funding priorities (to include infrastructure development)
 - Agree how far it is worthwhile to work with other stakeholders
- Planning and arranging a public relations programme
- Devising and arranging the fund-raising scheme in conjunction with our partner support groups

3. Maintain and renew the infrastructure and property

The railway is the land, track, bridges, stations, level crossings, signalling and associated equipment. Most of the foundations of the railway, including embankments, cutting and drainage were built around a hundred and fifty years ago. The trackwork has been repaired and renewed at different times in different places. The stations are of different ages and are in different conditions. Most of the signalling is of essentially Victorian design, but has been developed and regularly maintained.

Safety is of paramount importance, and must be the continuing major determinant of priorities. If the railway is unsafe it cannot be allowed to run.

Elsewhere in this Plan we have proposed that the railway will continue to grow in passenger numbers. We therefore need to make sure that this growth is supported by the various facilities that we are offering.

3.1 Our Aim: To maintain the infrastructure to continue to support RA5 locomotives safely on a daily basis

Timescale: Immediate and ongoing

We will achieve our aim by:

- Ensuring that the budget per mile for infrastructure management (to maintain at current standards) is at a minimum that of the average of heritage railways in the UK
- Maintaining a continuous programme of infrastructure inspections
- Reducing cant to appropriate levels to support 25 mph running
- A programme of sleeper and rail replacement
- Replacement of rail where necessary to maintain current standards
- Maintaining rail joints and ensuring a good 'top and line' to reduce wear on rolling stock
- Routine inspection and maintenance of switches and crossings
- Renewing, cleaning and topping up ballast to re-establish a sustainable track formation
- Renewing half a mile of track per year
- Routine inspection and maintenance of bridges, buildings and other structures
- Inspecting and monitoring earthworks

3.2 Our Aim: To enhance the formation to enable larger locomotives (possibly up to RA7) to operate on at least 40 days per year

Timescale: Within 5 years (by 2023)

We will achieve this aim by:

- Undertaking a major fund-raising exercise, including through a new share issue
- Completing an externally monitored review of the necessary works
- Developing a detailed project plan

- Additional replacement of rail necessary to achieve this higher standard
- Renewing the formation, and strengthening embankments and cuttings
- Undertaking whatever bridge strengthening or renewal is necessary to achieve the aim

3.3 Our Aim: To have a planned programme of station maintenance

Timescale: Within one year

We will achieve this aim by:

- Ensuring there is in place an up to date buildings survey for each station, or other major building
- Working with station “friends” groups and/or stationmasters and the WSRA to develop costed plans for each station or other major building
- Supporting “friends” groups and/or stationmasters in their fundraising activities

3.4 Our Aim: To increase the capacity of Bishops Lydeard station

Timescale: A five-year programme commencing in late 2020

We will achieve our aim by:

- Setting up a Planning Group for Bishops Lydeard
- Developing a new comprehensive long-term plan for Bishops Lydeard station
- Developing key aspects to include:
 - Purchasing and refurbishing the car park and toilets
 - Improving the café and shop
 - Building permanent accommodation for RAMS, and office accommodation
 - Building carriage sidings and covered carriage accommodation

3.5 Our Aim: To review and begin development of the Norton Fitzwarren site

Timescale: To commence detailed planning in 2019

We will achieve this aim by:

- Establishing a new joint entity with the WSRA and the WSSRT to own the freehold of the Norton land
- Setting up a new Planning Group for Norton Fitzwarren
- Consulting with other key stakeholders including parish and district councils
- Developing a comprehensive long-term plan for Norton Fitzwarren

4. Enhance our locomotives and rolling stock

This section covers the development and maintenance of locomotives, coaches and wagons. The actions mainly come under the control of the Mechanical Engineering Department. Without operational trains, there would be no offer to our passengers. Because the West Somerset is a heritage railway focussing on the steam railway era, most of our trains need to be hauled by steam locomotives. Coaching stock needs to reflect traditional steam era coaches (predominantly British Railway Mark 1 coaches), but must be of a standard that is clean and comfortable, and warm in winter. Our steam locomotives need to predominantly represent those on an ex Great Western branch line, but with interesting exceptions. Heritage diesel locomotives have run on the railway for many years, managed by the Diesel and Electric Locomotive Preservation Group (DEPG) and these are an important part of the West Somerset Railway scene, which should continue.

4.1 **Our Aim: To have available a minimum of six appropriate steam locomotives in the “home fleet” continuously available for use.**

Timescale: Within 3 years (by the start of the 2021 season)

We will achieve our aim by:

- Developing a detailed locomotive acquisition and maintenance plan, including detailed assessment of funding requirement;
- Clarify which locomotives will form part of the long-term home fleet and determine how additional locomotives may be identified, recognising the requirement of a dominant ex-Great Western group;
- Ensuring that sufficient budget is set aside (or identified from other sources) for ten-year locomotive overhaul costs (approximately £50,000 per year per locomotive);
- Enhancing the maintenance facilities through:
 - Ensuring there is a programme of ongoing recruitment and training of volunteers;
 - Ensuring that paid staff undertake continuous structured development and training;
 - Instigate an ongoing planned programme of equipment enhancement;
- Improving the Maintenance and Overhaul policy.
- Actively support the Diesel and Electric Preservation Group.

4.2 **Our Aim: To ensure that the coaching stock fleet continues to have a high level of availability and is maintained for the long term**

Timescale: Immediate and ongoing

We will achieve our aim by:

- Working to identify a site for a permanent paint shop;
- Ensuring that there is a clear programme of development for each vehicle;

- Ensuring that coaches are externally painted (including roofs) within three years
- Ensure that there is one set of dual braked coaches available for use
- Increasing the number of volunteers engaged in coach maintenance and restoration
- Actively support the WSSRT in their heritage coaches project

4.3 Our Aim: To ensure that there is available a Diesel Multiple Unit for use on the railway during each season

Timescale: Immediate and ongoing

We will achieve our aim by:

- Working to identify a site for covered DMU winter maintenance
- Ensuring that there are qualified technical staff available to undertake DMU maintenance
- Developing the volunteer group with an interest in the DMU
- Bringing back into operational use spare DMU cars that are owned by the railway.

4.4 Our Aim: To agree the medium and long-term use of Williton works for the benefit of the railway

Timescale: To agree and finalise a plan by mid-2018

We will achieve this aim by:

- Working with the WSRA, DEPG, WSSRT and other stakeholders to formulate workable plans
- To engage external partners in plans which work for existing and future users
- Undertake consultations with staff as appropriate
- Commence implementation

5. Retain and build our workforce, both volunteer and paid

This railway is totally dependent on the people that run it. This is a combination of a core of paid staff supported by a large workforce of volunteers. In order to work safely, we must ensure that all of our staff are properly trained and that they are fully competent for the jobs they have to do.

Volunteers must be nurtured and encouraged. We must have an environment where volunteers wish to continue to work for us (sometimes in inclement conditions). We wish to make the West Somerset Railway the volunteering opportunity of choice in this area. There is a very rich pool of talent that can be developed with young people who wish to build experience on their CVs. We offer a wide range of opportunities and we must tap into that potential.

The Railway also owes an obligation to its staff and active volunteers. Volunteers must operate to high and consistent standards, but they must not be taken for granted. It is salutary to reflect that any volunteer could walk away at any time, and a high priority needs to be given to retaining their loyalty. It is also important to continue to review the age and gender profile of volunteers and to have mechanisms in place to devise continuous recruitment.

5.1 Our Aim: To develop volunteer participation

Timescale: Immediate and ongoing

We will achieve our aim by:

- Developing an inclusive approach so that every member of staff whether paid or volunteer feels part of what we do.
- Making the WSR an attractive place for volunteers
- Develop a clear communications plan to ensure all of our staff are fully informed on developments on the railway
- We will strongly encourage volunteers to join the West Somerset Railway Association who will support volunteer participation
- Ensure that a clear company wide plan for volunteer participation is signed off by the Board and reviewed on an annual basis
- Ensure that each WSR department has a plan for volunteer recruitment and development
- Seeking to ensure that there is a network of volunteer co-ordinators across departments
- Develop systems so that volunteers can be transferred from one department to another, should they wish
- Develop systems further so that volunteers feel welcomed and valued and that they wish to return for further participation
- Work with external organisations to provide volunteering opportunities for young people seeking to gain experience for their CVs
- Work with affiliated organisations to understand what steps they might take to increase volunteer participation

- Developing recruitment, and opportunities for young volunteers under the Tracker arrangements

5.2 Our Aim: To have in place a full programme of pre and in-work training and development for operational staff of all grades

Timescale: Immediate and ongoing

We will do this by:

- Ensure that all of our staff are properly inducted, trained and competent for the jobs they undertake
- Developing the HR function across the railway to properly manage our staff
- Maintain a published programme for all training
- Monitor training (through the HOPS scheme), and ensure that there is in place an inspection regime for training
- Ensuring that staff welfare processes are available and accessible
- Ensuring that there is an effective staff whistle blowing policy in place

5.3 Our Aim: To ensure that there are systems for staff participation in decision making

Timescale: Within 2018

We will achieve our aim by:

- Ensuring there is a paid staff representative on the PLC Board of Directors, as an Associate Director
- Consulting with staff to assess whether the majority would find it worthwhile to establish a WSR Staff Association to enable collective discussion and negotiation with the PLC over matters of mutual interest.

6. Increase passenger service revenue

The survival and development of the railway depends on generating financial income from passengers and other visitors. We need to make sure, as far as we possibly can, that all passengers and other visitor have an outstandingly positive experience when visiting the railway. We need to generate income from our visitors but we must ensure that what they receive is seen as exceptionally good value.

6.1 **Our Aim: To increase numbers of passengers carried and passenger income by 4% year on year, starting in 2018**

We will achieve our aim by:

- Understanding our market better, including:
 - Who our present passengers are and where they come from;
 - Where we may gain new passengers;
 - What factors influence our corporate customers (coach companies etc)
- Ensuring that the timetable is driven by commercial demands
- Ensuring that there is sound business planning for all special events
- Exploring and devising new sales opportunities
- Having a flexible pricing structure, which reflects demand
- Making sure we have sufficient office capacity to receive and implement bookings
- Making all visitors – travelling and non-travelling – welcome. (Today’s station visitor is tomorrow’s passenger.)
- Ensuring that our rolling stock and locomotives are clean and well maintained to attract visitors and to encourage them to come back
- Generating feedback, analysing this and acting on it
- Having systems and offers to attract repeat visits

6.2 **Our Aim: To increase income from catering and other sales by 4% year on year**

We will achieve our aim by:

- Ensuring our catering and sales outlets are consistently attractive and competitive
- Ensuring our opening hours reflect passenger needs
- Reviewing and planning additional (or expanded) catering outlet arrangements
- Ensuring all staff are well trained in customer care
- Having in place a maintenance plan for on train catering outlets (buffet cars)
- Taking buffet car arrangements into consideration when redrafting timetables
- Ensuring we offer an outstanding level of on train dining

6.3 Our Aim: To ensure that the timetable is regularly reviewed to take account of commercial requirements and staff availability

Timescale: Immediate and ongoing

We will do this by:

- Monitoring feedback and understanding the costs and usage of services to make sure our timetable meets passenger needs
- Ensuring that the Commercial Department present their requirements in a timely and well structured manner
- Working closely with the Operations Department to ensure maximum workable opportunities are identified and agreed
- Consulting with paid and volunteer staff to ensure the timetable is realistic within staffing constraints
- Consulting with the Mechanical Engineering Department to ensure effective availability of motive power
- Developing effective modelling of staff fatigue and putting in place measuring and mitigation strategies

7. Develop the heritage and educational aspects of the railway

The unique selling point of our attraction is the heritage opportunities it presents. Visitors can come to us to experience the sights, smells and sounds of a traditional steam railway. We need to ensure that we respect the heritage we have and that all developments that we undertake take account of the heritage. The railway has a number of listed buildings and unique environments and these must be protected and capitalised on.

Each station needs to have a heritage and educational focus for visitors. It is however important to develop a major railway heritage attraction somewhere along the line, as several other heritage have successfully done.

7.1 Our Aim: To develop a heritage strategy for the railway

Timescale: during the first half of 2018 and implemented thereafter

We will achieve our aim by:

- Working closely with the West Somerset Steam Railway Trust (WSSRT) to support them in the development of a strategy
- To support and work with the WSSRT to develop the 'String of Pearls' along the railway
- To support the WSSRT in consulting widely on that strategy including internally as well as with external heritage bodies to make sure the strategy is appropriate and fits with best practice

7.2 Our Aim: To have features of a 'living museum' where visitors can experience the sights, smells and sounds of a traditional steam railway

Timescale: immediate and ongoing

We will achieve our aim by:

- Supporting the WSSRT as champions of the heritage developments along the railway
- Ensure that we have a planning regime where the heritage impact of all developments is taken into account
- Supporting the WSSRT in developing a heritage asset register and heritage survey
- Ensure, that for each station or other major building there is a comprehensive heritage survey, undertaken in collaboration with the WSSRT
- Ensure that all station or other major building changes or developments are in alignment with the heritage survey, and agreed with the Heritage Committee of the WSSRT

7.3 Our Aim: To develop a number of railway related attractions along the line

Timescale: To have the first attraction open by 2020

We will achieve our aim by:

- Working with the WSSRT and the WSRA to develop a strategic plan for attractions along the railway
- To plan one attraction in detail
- To identify funding support
- Work to realise the development within two years

7.4 Our Aim: To offer schools the opportunity to have an educational experience which integrates with the curriculum

Timescale: From the start of the 2019 season

We will achieve our aim by:

- Identifying a small team to work on developing educational opportunities for schools
- Identifying a small number of local schools who are prepared to work with us and trial materials
- The team developing appropriate curriculum programmes which can be made available to school parties, with a main focus on KS1 and KS2
- Identifying opportunities for students with special education needs

7.5 Our Aim: To develop work experience placements for young people

Timescale: immediate and ongoing

We will achieve our aim by:

- Identifying a small team to lead this work
- Drafting briefing information for schools and further education colleges indicating the range of options available, and also the constraints
- Ensure that placements are co-ordinated and monitored to ensure maximum effectiveness

8. Build relationships with internal and external partners

The West Somerset Railway comprises a complex network of organisations, with varying degrees of autonomy. Each organisation comprises individuals who themselves have various views about how the railway as a whole, and their part of it, should operate, and what should be the priorities. There is an important balance to achieve between, on the one hand, allowing groups and individuals sufficient freedom of action and, on the other, not giving so much free rein that either the operation and priorities become chaotic, or that actions of one group or another threaten the viability of the railway as a whole. Recent history has shown that this can happen and it would be naïve to ignore the possibility.

The Railway also has a moral obligation to various external stakeholders, many of which have given considerable support in various ways over many years. This includes local councils, community and business groups. The railway has an important obligation to its landlord, Somerset County Council. These relations need to be nurtured and developed and should not be left to chance. By being the largest employer in West Somerset, it is crucial that the railway continues to be a successful business.

8.1 Our Aim: To encourage and support affiliated organisations

Timescale: Immediate and ongoing

We will achieve our aim by:

- Our largest support groups are the West Somerset Railway Association and the West Somerset Steam Railway Trust and we will support them closely in their activities.
- Identifying for each affiliated organisation a PLC Director to act as point of liaison with the PLC Board
- Ensuring that all affiliated internal partners support and adhere to the WSR Safety Management System
- Identifying for each affiliated organisation a PLC Head of Department to act as main point of contact, the HoD and Director to work together
- Requiring each affiliated organisation to produce a brief Development and Business Plan, against which funding or other support may be provided
- Establishing systems of mutual publicity for each organisation as suits the individual organisation
- Requiring each affiliated organisation to adhere to a code of practice in terms of communication about the railway

8.2 Our Aim: To work with external stakeholders

Timescale: Immediate and ongoing

We will achieve our aim by:

- Maintaining centralised information about key stakeholders and contacts
- Devising and offering periodic events to develop relations with key stakeholders

- Determining which individual in the railway shall have responsibility as main contact for each key stakeholder
- Enhancing and developing our use of local suppliers to the railway; keeping centralised information about the use of local suppliers and reporting this to the Board periodically
- Working with the Partnership Development Group

8.3 Our Aim: To improve the railways public relations profile

Timescale: Immediately and ongoing

We will achieve this aim by:

- Identifying a senior staff member to plan and deliver this work. Allowing them sufficient time to undertake the work
- Producing a costed public relations plan for agreement by the Board
- Developing further relations with media outlets, and issuing regular press releases
- Maintaining a universally applied brand image
- Continuous monitoring and developing the WSR website
- Developing the railway's social media profile
- Developing a programme of media opportunities
- To actively solicit film shoots, through working with film location agents