

West Somerset Railway PLC

Corporate Plan 2014-2023



SW/CP/version 6

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Chairmen's Foreword

The nature of the business of the West Somerset Railway PLC must be defined and refined in the ever-changing economic climate we will have to contend with in the coming years.

To this extent we have produced the first Corporate Plan by the Company for a period of 10 years. It defines the business aims that will need to be addressed if the Company is to prosper and meet its objectives. The Plan provides a framework for the development of the commercial, operational and infrastructure requirements for the Company's activities and identifies the range of issues to be addressed.

We have sought to involve all the support groups and local businesses who contribute to the well-being of the Railway as the Plan will not work if the Company tries to achieve it in isolation. We have also held discussions with other stakeholders such as the local authorities who support the railway together with our key partners on the national rail network. All have a contribution to make in developing the prosperity of the West Somerset Railway.

Implementation of the Plan will provide the basis on which those involved with the day to day running and the long-term business of the Railway will have clear objectives to achieve. The Corporate Plan will inform the three-year business planning process including budget setting and priorities for investment.

It is inevitable that in an ever-changing environment, the Plan must be revised over time. It does however provide the basis for a sustainable future for the Railway and the Company. On behalf of the Board of the PLC, we commend the Plan to the reader.

Humphrey Davis
Former Chairman

John Irlen
Chairman

June 2014

Introduction and Purpose

i. The purpose of this Plan is to set out a 10 year vision for the railway and place it in the context of the economic, railway preservation, financial and workforce environment in which the WSR expects to have to operate over the strategic period. The PLC recognizes that this cannot be achieved in isolation from the contribution made by many of the stakeholder groups and organisations that contribute to a successful West Somerset Railway going forward. Considerable effort has been made to engage with a wide range of interested parties and the PLC would like to thank those individuals and organisations for their inputs, much of which is reflected in the Plan.

ii. Alongside the development of the Corporate Plan, the PLC Board has also been considering the future organisational model required to take the WSR forward over the next few years and to enable it to continue to deliver a high quality leisure, tourist and heritage operation that is commercially and financially viable. The Board has therefore undertaken a corporate review of the PLC structure at Board and Executive level. Proposals will be considered in 2014 and a timetable for progressive implementation agreed. Clearly, the Board is mindful of the need to balance the competing requirements of the skills required to operate the railway with those of affordability and responsibility to shareholders.

iii The Corporate Plan will also form the basis of the first three year Business Plan for the railway to be implemented from early 2015. This will be reviewed and updated on an annual basis.

The Process Adopted in Developing and Consulting on the Plan

iv. It was important that the Board established a clear and formal process for developing the Plan. The first step to be taken was to appoint a nominated Director to assume leadership and responsibility for the preparation and coordination of the Plan. This was discussed and recommendations approved by the Board in November 2012. At the same time, the Board also considered and approved proposals for development of the Plan which incorporated:

- An internal information gathering exercise using a standard pro forma from senior managers and heads of department in relation to their current and future ideas about the needs, challenges and development opportunities around the railway.
- An external stakeholder information gathering and consultation model again using a standard pro forma. This was sent to all the main groups who are involved with the WSR and a list of those groups and individuals who were invited to contribute is provided as an Appendix.
- A Board seminar held in February 2013 where Board Directors and Associate Directors participated in a workshop which enabled those present to have a wide ranging discussion on the current and future issues facing the PLC and the railway. The outputs were then written up and approved by the Board in March 2013 for incorporation in the Plan.
- Individual meetings with senior managers and heads of department to obtain more detailed information on their services and ideas for the future.

- Individual meetings with external stakeholders groups (at their invitation) both as an aid to completing the pro forma but also to enable views to be directly expressed to a Board Member.
- Meetings with local authorities, Members of Parliament and railway organisations including:
 - Somerset County Council
 - Taunton Deane Borough Council
 - West Somerset District Council
 - Jeremy Browne MP
 - Ian Liddell Grainger MP
 - Network Rail
 - First Great Western.

v. What the above demonstrates is that the PLC is seeking to take account of the widest possible range of views to inform its conclusions about the strategic direction for the organisation.

vi. The draft Corporate Plan was considered by the Board in November 2013 and approved for consultation. There were over 70 responses. The final Plan was approved by the Board in March 2014 for implementation from 2015 onwards.

vii. As has already been said, there has been a wide range of contributions to the Plan. A list of the organizations which have been involved in its development is provided in Appendix 1, The document has been prepared with individual chapter headings for each of the major areas of railway business in which the Company is engaged. Hopefully, it is easy to read and understand. Once consultation has been completed, a brochure style summary version will be produced and made widely available.

Strategic Priorities in the Plan

viii. As a result of consultation and following further Board discussion, the following have been identified as major strategic priorities over the lifetime of the Plan

- **Strategic site development at Bishops Lydeard for which a comprehensive plan is required,**
- **Further recruitment, retention and development of volunteers,**
- **Development of commercial services and improved commercial performance,**
- **Specific focus on heritage and preservation,**
- **Maintenance and improvement of sustainable infrastructure,**
- **Taunton to Bishops Lydeard feasibility study and beyond,**
- **Developing stakeholder partnerships and shared plans.**

Chapter 1: Current Position, the Railway in 2014

1. The West Somerset Railway (WSR) in total is a 22.75-mile (36.6 km) heritage railway line. It operates services using both heritage steam and diesel trains. It originally opened in 1862 between Taunton and Watchet. In 1874 it was extended from Watchet to Minehead by the Minehead Railway. Although just a single track, improvements were needed in the first half of the twentieth century to accommodate the significant number of tourists that wished to travel to the Somerset coast. Despite this traffic, the line was closed by British Rail in 1971 but was then reopened (just five years later) in 1976 as a heritage line.



2. It is currently the longest standard gauge heritage railway in the United Kingdom. Services normally operate over just the 19.75 miles (31.8 km) between Minehead and Bishops Lydeard. During special events some trains continue a further two miles to Norton Fitzwarren where a connection to Network Rail allows occasional through trains to operate from and on to the national network. The operating season runs from February to December each year and in addition to the regular timetable, there is a wide variety of special events and activities that are carefully packaged to appeal to the broadest possible leisure, tourist and heritage interests amongst those who visit and ride on the railway.

3. In 2012, the railway carried around 200,000 passengers and 197 816 in 2013 which reflects a continuation of a downward trend that coincided with the beginning of the national economic recession in 2008. Nonetheless, the PLC was able to post a small profit on its trading activities although at the expense of cutting back on its Capital Investment Programme to preserve liquidity. In 2013, the Company saw a growth in sales and income from advance purchase Day Rover tickets reflecting a wider improvement in overall fare and retail income. The picture in the first part of 2014 is more mixed.

4. Of course, the WSR contains a wide range of heritage, educational, preservation, commercial and tourism activities along the line. These are either run by the Company or one of its external support organizations. These include:

- the Museums at Bishops Lydeard, Washford and Blue Anchor
- the Somerset and Dorset Steam Trust sheds and rolling stock at Washford
- the Diesel and Electric Preservation Group sheds and rolling stock at Williton
- the Association Restorations workshops at Williton on which site can also be found the Steam Trust's main Great Western Railway heritage carriage restoration activities
- the majority of the stations being managed, sustained and developed by a dedicated Friends Group
- links to regular activities including special events, themed days, steam and diesel galas and commercial arrangements with tourism partners including for example, Butlins and Exmoor National Park.
- driver experience courses on both steam and diesel locomotives
- the opportunity to hire a train for special occasions such as weddings

- good quality shop and catering facilities at Bishops Lydeard and Minehead supplemented by regular buffet car availability on all scheduled trains. The Quantock Belle Dining Car train run by the Association is a regular favourite
- availability of the line for filming and other media opportunities
- provision of training courses and activities including national rail organizations such as Network Rail.

5. Over the last two years and up to the end of 2013 significant achievements will have included:

- completion and operational implementation of the triangle at Norton Fitzwarren (a WSRA led project)
- initiation of the Station Farm project at Bishops Lydeard
- upgrading of the passenger gated crossing at Goviers Lane, Watchet
- purchase of the land at Station Farm, Bishops Lydeard.

6. The West Somerset Railway PLC had been in negotiation with Somerset County Council between 2011-2013 to secure our future by negotiating the sale of the freehold, but when that was declared unavailable, followed SCC suggestions that led to an offer from officers for an extended lease with right of first refusal to purchase. As well as securing the freehold for the future, this would allow the plc to both invest further resources in railway infrastructure, and to demonstrate security of tenure for existing and new partners who wish to bring additional jobs, prosperity and growth to the railway. Although having member involvement, it has not been explained why the offer was not translated into a member decision before being overtaken by a decision to sell in 2013 when a bid had been announced by the WSRA and SCC. Both groups subsequently bid separately when the decision to sell was confirmed. After bid evaluations under a due diligence process SCC decided not to proceed with a sale. Council Leader John Osman has declared publicly that the freehold remains safe with SCC who will never sell outside the WSR. The Company is seeking the extended lease and right of first refusal to purchase to be completed by SCC to guarantee this promise and provide a long term solution for the railway. This will be in consultation with participants in an appropriate stakeholder group as suggested elsewhere within this Plan.

7. The Railway is also a significant employer in the West Somerset area. It employs around 50 people at any one time supplemented by approximately 1100 enthusiastic and dedicated volunteers without whom the continued development and success of the WSR would not be possible.

8. The PLC also receives significant and much welcomed financial, volunteer and heritage support from the various "Friends of" Groups along the railway together with those organisations which contribute to the operational or financial health [or both] of the WSR. These include the West Somerset Railway Association (WSRA) and the Diesel and Electric Preservation Group (DEPG) which also work on their own activities and the individual owners of locomotives and other rolling stock. The WSR is also home to a number of other independent preservation groups working on their specific projects using facilities provided by the WSR PLC. In addition to the DEPG, there is the West Somerset Steam Trust and the Somerset and Dorset Railway Trust. As previously indicated, a list of the support organizations is provided in Appendix 1. Many have

engaged with the process of developing the draft Plan and their aspirations and ideas are reflected across the document.

9. The WSR has continued to develop its relationships with key players across the national railway network including Network Rail (stone trains, charter trains and NR training programmes, safety and compliance), First Great Western (Gala shuttle specials to Taunton) and the Office of Rail Regulation. The PLC is also an active participant in the Heritage Railway Association and is fortunate in having one of its Directors as Vice Chairman of the HRA.

10. The difficulties around the national franchising programme have been widely reported in the railway press and national media. As a result, the Department for Transport has published a revised timetable for the franchising process which includes the Great Western network. The PLC has taken the opportunity presented by these developments to re-examine the question of future use of the rail link between Bishops Lydeard and Taunton. Preliminary meetings with both First Great Western and Network Rail have suggested that there may be some support for moving forward with a feasibility study. Consultation on the Plan has identified significant support for this initiative and for detailed work on the establishment of scheduled trains onto the national network.

11. In line with the recommendations made by the All Party Parliamentary Group on Heritage Rail in their "Report on the Value of Heritage Railways [July 2013]" there have been new discussions initiated with the County Council as the statutory transport authority for the area. What has been agreed with the Council is the development of an informal scoping study to test out whether there is an economic, leisure, environmental and transport basis for a more formal feasibility study leading to a business case process. It is anticipated that the pre-scoping work will be completed by late 2014/early 2015 and a decision reached as to whether further work is justified. If this is the case, then it is likely that the Company will need to find the organisational capacity, expertise and funding to contribute to a wider partnership based exercise which will need to be tied into the County's future transport plans and the proposals of potential franchise operators.

Chapter 2: Setting the Context

An overview of heritage/preserved railway position nationally and going forward and its implications for the WSR

12. The heritage railway network in the UK is one of the most well-developed systems in Europe and has a well-deserved reputation for excellence in its provision of tourist, leisure, heritage, education and preservation of predominantly steam railway history. The West Somerset Railway occupies a deserved place as one of the larger preserved railways within this network. However, like many of its compatriots, the WSR is facing a range of challenges in seeking to maintain a sustainable business over the medium term. These are not exclusive to the WSR and reflect, at different levels and in differing ways, the situation across the country.

13. The Company recognizes that it reflects an organisation established for an historical purpose i.e. to set up and run a preserved railway but which now needs to enhance its potential to allow it to flourish as a sustainable business with clear objectives and strengths. This requires a commercial model and a corporate structure that will enable this to be carried forward over the lifetime of the Plan. Some of the factors influencing current considerations include recognition that:



- The original generations of steam railway enthusiasts have grown older and are not necessarily being replaced and in the right areas. Targeted succession planning must now be at the forefront of Company thinking.
- The original proposition of a heritage activity as part of the local leisure market run largely by volunteers may not be sufficient to guarantee long-term viability.
- There are more and varied uses for increasingly tight disposable income amongst potential customers. Therefore the offer needs to be continuously refreshed.
- The costs of running a preserved railway are significant and growing.
- Skills and competencies in what is a niche market are at a premium and need to be grown/retained as part of a planned process of renewal of the workforce.
- Accountabilities at Board and management team level are now much more extensive and complex than 30 years ago. Membership, skills, behaviour and engagement need to reflect the reality of corporate, legislative, compliance and other frameworks.
- The business model needs to be realistic, achievable and sustainable over time and needs regular review to ensure its applicability to changing circumstances.
- Leadership of the organisation and its external/internal projections are key to success and reflect the way in which the organisation is perceived.
- The WSR cannot exist in isolation. It needs to build on existing partnerships [and develop new ones], networks and constituencies which will allow it to operate in an

increasingly complex economic, social and employment environment where there is recognition of the impact of external factors on the sustainability of the railway.

- The Company needs to be able to build on its current ability to communicate, market and share its successes, challenges and opportunities in order to keep it at the forefront of both the local leisure and tourism market but also the national preserved railway network.
- The Company will continue to work on attracting resources and needs to be in a position to take advantage of new ways of accessing funding streams for its programmes and projects. This also links to partnerships.

14. This of course needs to be viewed in the context of the ongoing success of the railway as a major heritage and tourist attraction in the Southwest, major commitment from its existing volunteers and support organizations, good overall financial health and effective relationships with the majority of its partners including the national rail network.



Local Economic Outlook, Strategic Priorities and Opportunities over the next 10 years

15. The WSR does not operate in a vacuum separate from the national outlook and local economic, demographic and commercial position in this part of Somerset. Since 1985 the WSR has carried over 2 million people. In more recent times, the railway has seen a reduction in the number of passengers carried from a high point of 226,000 in 2007 to around 200,000 in 2012. The annual cost of keeping a 150 year old railway infrastructure up to modern standards and in compliance with safety regulations and operating procedures increases as the years go by. The PLC has to be in a position to maintain an ongoing programme of works to ensure that these high standards can be sustained.

16. The railway also wishes to be able to maintain its position as a significant provider of locomotive overhaul and maintenance capabilities and capacity not only to deliver its own services but also to undertake contract work for other railways and individual locomotive owners. It has a good record of achievement in these areas, but has to be able to sustain workforce skills, expertise and knowledge as well as enhance its engineering estate and equipment to be able to meet the increasingly stringent standards and expectations in relation to ageing rolling stock and getting the best value from the components market. The WSR also has to look at ways of improving efficiency and productivity in its engineering processes and activities. This includes the opportunity to invest in new tools and machinery to ensure that the home locomotive fleet of 6 steam engines [2 owned by the PLC, 1 on long-term hire and 3 on medium-term hire] can be sustained and if necessary, enhanced. One of the areas that the PLC wishes to examine in more detail is its relationship with the WSRA activities at Williton to ensure that both organisations are obtaining value for money and are able to deploy scarce skills and infrastructure to best effect for mutual benefit.

17. Like many of its contemporaries, the WSR is in a "chicken and egg" situation with regard to the relationship between certain areas of heritage equipment and the advantages of modern technology. This could manifest itself in many different ways from on train ticketing equipment to the need for modernisation of Information Management and Technology across the railway to maximise communications, data capture, information dissemination and improved operational and strategic management decision-making. This will not however alter the basic philosophy of using traditional equipment for the vast majority all of its railway activities. The Company will take a measured and balanced view on these issues as opportunities and requirements arise.

18. Another major area of challenge is the age profile of the volunteer workforce on the WSR. Some volunteers have been associated with the railway since its inception as a preserved line and have continued to make a valuable contribution over many years. However, both the number and interests of new and potential volunteers is likely to alter over the period of this Plan as the impact of changes to the retirement age, family and other commitments and the costs of travelling to and from the railway impact on people's ability to give freely of their time. The PLC has to be alive to the implications of this situation and has to have a realistic plan in place to increase and improve the attractiveness of the WSR to new volunteer entrants and more accurately pinpoint their skills and attitudes to match with the needs of the railway going forward.



19. All of the above have to be seen in the context of what is happening externally around the railway. The impact of a reduction in the availability of discretionary spending, rising costs (for the railway and its customers), uncertain weather patterns, alternative tourist options and the age profile and interests of visitors all lead to the need

for a reappraisal of the business model and the nature of the offer being made to future WSR travellers whilst not losing sight of the fundamental aims of railway heritage and preservation.

20. Taking all of this into account, the PLC will over the period of this Corporate Plan therefore:

- Revisit and review its business model including pricing policies, special events and the operating season.
- Re-double its efforts to enhance commercial opportunities and options for growth,
- Review and update its marketing strategy.
- Place greater emphasis on the quality of, and forward planning for, maintenance and improvement to railway infrastructure. This will be delivered through the new respective strategic engineering and infrastructure strategies.
- Develop an Information Management and Technology strategy.
- Prepare a comprehensive workforce and training/development strategy.
- Take a more businesslike approach to commercial arrangements with stakeholder organisations around use of infrastructure, trains and travel.
- Review the corporate organisation to ensure that it is fit to purpose.
- Place greater emphasis on the quality of, and forward planning for, railway infrastructure,
- Be far more proactive in its work to externally procure alternative sources of funding both in its own right for specific fund-raising projects and in partnership with the other key players.
- Examine flexibilities in terms of shorter, more frequent trains where the timetable, crew, commercial viability and capacity opportunities allow

21. This is in the context of the challenges referred to above but also to position the WSR to take advantage of opportunities that the PLC anticipates may well rise over the next few years including:

- The impact of the Government's new franchising programme and the opportunity to influence potential bidders with regard to future relationships with the WSR.
- The way forward with the County Council and the South West Peninsula Rail Spine Report.
- The ongoing development of the Station Farm Project.
- The outputs from the development work being undertaken by key local railway partners including the Steam Trust, Somerset and Dorset Trust and the West Somerset Railway Association together with the groups working on dedicated rolling stock projects.



- Ongoing partnership with Network Rail not just around the stone trains but wider opportunities including acquisition of equipment rising from network modernisation, training and development work and the Taunton link.
- The impact of further housing development in the local area and its implications for transport infrastructure.
- The domino effects of the major developments at Hinkley C nuclear power station.
- Bids for external monies from designated funding programmes utilising the expertise, knowledge and experience of strategic partners and other organisations.
- Reaching a view with the WSRA about the future development of the Norton Fitzwarren triangle land area in the context of facilities and supporting infrastructure for the railway.

22. All of these issues are examined in more detail in the following sections of the Plan.

Chapter 3: Strategic Vision and Corporate Goals

Strategic Vision

23. The strategic vision for the WSR up to 2024 is to:

"To continue to be seen as a leading heritage, preservation and tourist railway, contributing to the economic well-being of West Somerset and providing a high-quality experience for our customers, staff and volunteers. Working with external partners, to grow and deliver the sustainability of the WSR and to ensure that the railway can be operated safely with facilities and infrastructure that are fit for purpose".



This means:

- 1. Enhancing the quality and attractiveness of the experience offered.**
- 2. Enhancing the quality and capacity of the railway's infrastructure.**
- 3. Strengthening the ability to continue to provide a reliable steam hauled passenger operation.**
- 4. Succession planning for all roles and responsibilities on the railway.**
- 5. Ensuring the safety, compliance and regulation are adhered to at all times.**

- 6. *Improving the way we engage, support and value all who work on the railway.***
- 7. *Investing in the care of heritage buildings, vehicles and collections.***
- 8. *Working to strengthen the railways finances to secure long-term sustainability.***

24. In order to do this and to continue the focus on quality, safety, customer and staff experience these aims must be underpinned by the following corporate goals:

- ensure that the railway infrastructure is of high-quality consistent with current and future standards of compliance and operation
- work with partners to strengthen the heritage and educational role of the railway
- enhance the quality, range and attractiveness of the WSR to its existing and future customer base
- strengthen the sustainability of the organisation including its financial position over the lifetime of the Plan
- continue to provide an overarching steam hauled railway operation
- improve communications and engagement across the railway including, staff, key stakeholder organisations and groups
- develop the railway workforce and secure greater alignment between the interests and skills of both paid staff and volunteers and the needs of the railway
- strengthen the capacity and structure of the corporate organisation to deliver the aims and objectives of the Plan
- maintain our position as a major player in the local economy and seek to find ways of improving commercial performance.

25. The following sections of the Plan set out the specific activities required to deliver on the vision and corporate goals together with how these will be taken forward and who will assume responsibility for achieving delivery. The Plan contains a number of strategic statements to which the Company will commit itself in terms of achievement during the next 10 years subject to all the caveats and external influences that will undoubtedly require regular review and occasional revision of strategic objectives and individual projects.

Chapter 4: Operations

26. Of crucial importance to the success of the WSR is the need for clarity around the future nature of the operational railway. This section sets out the core requirement, the developmental agenda and the specific projects and actions which the PLC is looking to progress over the strategic period.

The Core Railway and Operating Season

27. The WSR is currently a 20 mile preserved railway running scheduled services from Bishops Lydeard to Minehead. In addition, there is a further three miles of track towards Taunton and the junction with the mainline network at Norton Fitzwarren which is also part of the leased infrastructure from Somerset County Council. The WSR is a 25 mile per hour railway all of which is subject to a Light Railway Order working to the statutory requirements of the Office of Rail Regulation. There are no plans to change this arrangement in respect of the core 20 mile line but that may not be the case necessarily in future for the Bishops Lydeard to Norton Fitzwarren junction section depending on the outcome of the Taunton link scoping study with the County Council (see later in the Plan).

28. The main operating season runs from February to December every year. Historically, operations have increased incrementally over the 12 month period such that trains running in and around the December holiday period have now become part of the normal timetable. This inevitably impinges on the ability of the various operating departments to undertake the necessary remedial and maintenance work programmes required to keep the railway maintained to a good standard.

Strategic Statement

There are no plans to change the core operating period for the timetable. There will however potentially be alterations to the content of the core operating period timetable (see section on Commercial Department)

Norton Fitzwarren Triangle

29. Since 2012, thanks to the efforts of the West Somerset Railway Association working in partnership with the PLC, it has been possible to use the triangle at Norton Fitzwarren to turn locomotives, run shuttle trains between Bishops Lydeard and the platform at Norton Fitzwarren as part of special events and to provide the necessary trackwork and holding area for the receipt, unloading and dispatch of Network Rail stone trains. The connection with the mainline network at Norton Fitzwarren junction correctly sees



over 700 train movements per annum and this is likely to continue for the foreseeable future and indeed increase if strategic plans to develop services and facilities on the WSR come to fruition.

30. Whilst there may be some within the Company and external support organizations who have aspirations to extend the running mileage of the railway to Norton Fitzwarren, to do so will have a major impact on the timetabling, availability and workforce deployment across the railway. It is already a significant activity to detach locomotives from trains, run them to the triangle and return them to Bishops Lydeard. The round trip for the average passenger takes over three hours (exclusive of any passenger dwell time at any station) and it is by no means certain that an extension of the journey time will result in a clear economic and operational benefit to the railway.

31. The other factor here relates to the facilities at Norton Fitzwarren triangle itself. In order to consider whether or not any extension of regular WSR timetabled services beyond Bishops Lydeard would be a viable proposition, it will be necessary for the WSRA who own the Norton Fitzwarren triangle site to come up with a substantive scheme to improve and extend the platform infrastructure, car parking and passenger facilities. The PLC does, however, wish to continue to use the Norton site for the storage and onward movement of spoil and related materials principally in connection with infrastructure upgrades along the core railway including the development of the Station Farm site and potential reinstatement of a second running line between Bishops Lydeard and Norton Fitzwarren junction. These are covered in more detail later in the Plan.

Strategic Statement

The WSR will assess its future requirements for the use of the Norton Fitzwarren triangle site in conjunction with the WSRA and reach a strategic view on options and the preferred way forward with the Association. The timescale for this will be within the next three years and will be subject to a formal report to and decision by, the Board.

Charter Trains

32. The WSR will continue to encourage charter train operators, Train Operating Companies and other commercial ventures to operate special trains on to the West Somerset Railway. These will either terminate at Bishops Lydeard or run the whole length of the line to Minehead. Although the charter market is, like many other commercial activities, suffering from the impact of the recession, the PLC believes that there is scope for sustaining and indeed, increasing the number of special trains hosted by the WSR consistent with the needs and priority to be given to the standard operating timetable.

33. In 2011, the PLC experimented with the idea of being a joint partner in operating a special service from Minehead to Bristol. In the event, this particular exercise was not successful for a number of reasons, including problems with pathing availability on the mainline network and late notification of approval thus restricting marketing activity. There is currently no obvious market for the WSR to exploit and it is not core business.

That is not to say however that future opportunities may not arise and the Company will remain alive to this particular market.

Strategic Statement

The PLC will continue to encourage charter trains onto the railway as part of its new commercial strategy. However, the Company itself will not enter as a partner into the charter train arena given the level of business and financial risk involved. The PLC is however willing to review the position at a later date should the commercial circumstances alter.

Taunton to Bishops Lydeard link

34. One of the historical issues to re-emerge during 2013 has been further discussion on the question of running scheduled trains over the Taunton to Bishops Lydeard line. The reason why this has happened is because:

- The reorganisation of the national rail franchising process has provided an opportunity to reassess the merits of any case for scheduled services provided by a Train Operating Company.
- The emergence of the Metro West proposals for the Bristol city region together with the electrification programme on the Great Western and their respective implications for train services and timetables to the south west.
- The publication of a joint report by local transport authorities in the South West (South West Peninsula Rail Spine Report) which advocates significant improvements to rail services south and west of Bristol to which Somerset County Council is a signatory.
- The success of three major preserved railways in 2013 in achieving reconnection/funding for reconnection to the mainline network (Bluebell Railway, Swanage Railway and North Yorkshire Moors Railway).
- In principle support for assessment and study from First Great Western and Network Rail.
- The emergence of potential new commercial partnership opportunities with Butlins at Minehead.
- Growth in housing development in the local area and concerns about the capacity of road transport infrastructure to cope with demand.
- Support from local MPs and District Councils.



35. Following discussions with Somerset County Council, a partnership approach to a pre-scoping exercise has been established between the Council and the PLC to look at the options, demand and costs associated with the running of scheduled trains. If the outcome of this initial work is favourable, then this may lead to a full feasibility study. There are three obvious potential options:

- WSR trains to Taunton on the existing track layout.
- Train Operating Company scheduled trains to Bishops Lydeard.
- Scheduled and heritage trains on dedicated track [former up relief line].

36. Vital to any subsequent phases of development work will be the availability of external funding to cover the cost of consultants and other expenditure. Crucially, the timing of such work will also be important in the context of being able to influence franchise bids for the Great Western network between 2014 and 2017. The PLC is also looking at partnership work with Severnside Community Rail Partnership based in Bristol and a working group of County and District Councils in Devon and Somerset to position the Taunton to Bishops Lydeard work within wider discussions about improvements to rail services in the West Country.

Strategic Statement

The PLC will commit itself to further participation in any feasibility study to examine the question of scheduled trains over the link subject to the availability of funding, appropriate expertise and the right level of support and input from the County Council as the local transport authority for the area together with other partners.

Development of Operational Capacity and Facilities at Bishops Lydeard

37. In 2012, a joint working group under the chairmanship of the PLC was established with the West Somerset Steam Trust and the West Somerset Railway Association to prepare proposals for the development of the Station Farm site. This is a major project which has three distinct elements:

- To increase the operational capacity of the railway by the installation of three additional sidings with covered accommodation adjacent to the station.
- The provision of a new museum and associated facilities including covered accommodation for heritage carriages, artefacts and historical archives.
- Expansion of commercial and retail outlets for rail customers using the Bishops Lydeard site together with additional car parking.

38. The PLC has already made significant progress. It has obtained planning consent for the operational capacity expansion proposals and has now formally acquired the Station farm site from its previous owners. Following Board discussions in early 2013, the PLC will now proceed to acquire the Stationmasters house itself in order to safeguard the integrity of the site and future access and operational flexibility. It is hoped to achieve acquisition by early 2014 at the latest as part of phase 1. The Steam Trust is working on a National Lottery Bid (see later) and the West Somerset Railway Association is developing proposals for its share of the project (see later). The Company will also need the support of the Friends of Bishops Lydeard station and the WSRA In considering the wider development of the station itself.

39. This is a long-term scheme which is only likely to come to full fruition towards the end of the current Plan period and is subject to significant uncertainty around funding

levels and other considerations. Nonetheless, an important start has been achieved and all the partners are committed to making progress as capacity and resources permit.

Strategic Statement

The PLC is committed to the completion of the Station Farm Project in all phases subject to confirmation of funding and project development. It will lead on the phase 1 requirements and, together with its partners, will look to achieve completion of phase 1 by 2016/17. The PLC will support its strategic partners in the realisation of their plans consistent with available finance and agreement on project management and capital programme arrangements.

40. The other major component of the Bishops Lydeard site development will be the enhancement of the current locomotive compound on the southeastern part of the site to provide covered accommodation and additional facilities (engine shed). A proposal and project plan for this will need to be worked up by the management team for consideration by the Board and will form part of the development agenda to be pursued during the 2014/17 Business Plan. This however needs be part of an overall Site Development Strategy for the whole of the Bishops Lydeard site.

Strategic Statement

The PLC will develop a Site Development Strategy for Bishops Lydeard. This will include the development of outline proposals for expansion and enhancement of the current locomotive compound at Bishops Lydeard during the planning period up to 2017. Subject to agreement on the SDS, approval will then be given to working up the business case for the locomotive compound.

Development of Operating Capacity Along the Railway

41. There are a number of locations along the WSR where the opportunity exists to expand capacity in order to improve the operational flexibility and volume of traffic that the railway is capable of handling. These include:

- loop at Washford
- final works on the Williton loop
- loop at Dunster [southern end]
- sidings at Williton and Crowcombe Heathfield
- double track Bishops Lydeard to Norton Fitzwarren [dependent on the outcome of the debate involving Sustrans about a potential cycle track]
- double track Minehead to Dunster.

Strategic Statement

Each of these proposals will be placed in the capital programme for initial examination and, subject to feasibility, resources and business case

examination will be worked up in more detail by the management team over the strategic period of the Plan.

Proposals from Support Organizations

Diesel and Electric Preservation Group [DEPG]

42. The DEPG is based at Williton and its major focus is the preservation of heritage diesel locomotives and the development of a centre of excellence in relation to knowledge, training and education of future generations in the management, maintenance and restoration of heritage diesels. It is the main provider of heritage diesel traction to the WSR and plays a significant role in supporting the operation of the railway including the organization of special events. DEPG has confirmed that it wishes to continue in these roles over the period of the Corporate Plan and is supportive of the proposals to increase/improve operational capacity along the railway.

Chapter 5: Commercial Services

43. Commercial Services across the WSR are currently organized in three distinct areas and each have contributed their own proposals to this Plan:

- Sales and Marketing [including ticket offices]
- Retail [based at Minehead station]
- Catering [the Café at Minehead station and train buffet services].

44. The retail operation at Bishops Lydeard station is run by the West Somerset Railway Association who also run the Quantock Belle Dining train. The retail operations at intermediate stations between Bishops Lydeard and Minehead are run by the voluntary groups [Friends of each station] providing a range of both catering and retail services reflecting the capacity and facilities available to deliver a reasonable customer service at each location.

45. Internally within the PLC, sales and marketing and retail are combined within the Commercial Department, but catering is separately managed and it is accountable directly to the General Manager. It can therefore be seen that current arrangements for commercial services across the railway are both complex and fragmented, reflecting as they do the historical and piecemeal way in which responsibilities and services have been developed. This is not an acceptable situation and is unlikely to facilitate delivery of coordinated and optimized commercial opportunities and solutions.



Sales and Marketing

46. In recent years the Sales and Marketing Department has made significant progress in developing a wide range of marketing and retail initiatives that reflect the changing demands and interests of the travelling public on the railway. The Department is responsible for the marketing and retail activities of the West Somerset Railway PLC and all of the products and services it offers and the sales of these products and tickets to achieve the annual budgeted fares income set by the Board.

47. The PLC recognizes the importance of maintaining and growing its market share within the leisure sector in West Somerset together with sustaining and responding to, the interests of enthusiasts of heritage and preserved railways. The ongoing role of the Sales and Marketing Department will therefore continue to be to promote the West Somerset Railway as one of Somerset's/South West England's leading heritage visitor attractions. It is also intended that the retail component of the Commercial Department activities including the shop at Minehead will continue to expand that the range and quality of the offer to customers as opportunities and resources allow.

48. The railway also has to be mindful of the current economic climate which is likely to be in place for the foreseeable future and the fact that the majority of its market appeal relies on a customer base that is increasingly selective about how it uses its disposable income. What is absolutely vital is a continuing focus on delivering value for customers

and ensuring that the offer to the leisure market and preservation enthusiasts alike maintains its competitiveness and is well communicated. Some of the emerging themes for Sales and Marketing going forward are therefore around:

- The communications "platform" used to deliver sales and marketing messages. Social media outlets are increasingly important particularly in relation to younger age groups whose interest in the railway is less around preservation and heritage but more to do with general leisure and enjoyment.
- Ticket pricing policy. Optimizing the offer against customer use of different ticketing options to maintain and grow overall sales and profit.
- Joint marketing opportunities. Exploring these further with local authorities and relevant tourist organizations across West Somerset.
- The future of specialist galas and their commercial importance to the railway family.
- Targeting younger age groups and families and offering improved value in terms of what they are looking for from their overall leisure experience.
- The importance of Information Technology to the operation and delivery of commercial activities. The WSR needs to strike the right balance between "heritage" equipment which complements the overall preserved railway experience and the use of modern technology to optimize income and improve business intelligence to support decision making.
- Improved visitor information including audio guides.
- Overhaul of the website,
- The relationship between a motivated and sustainable volunteer workforce and the activities of Sales and Marketing. This relates both to volunteers who help to deliver the various programmes and initiatives and also the role of Sales and Marketing in promoting the railway as a positive volunteer experience.

49. Sales and Marketing currently work in cramped office conditions within the general administrative base at Minehead station. This is not an ideal situation for the Department and requires resolution during the lifetime of this Plan.

Retail

50. In terms of the retail operation, the main focus for the PLC currently is the shop at Minehead station. The purpose of the Department is to sell stock items by interacting with potential customers, providing them with an effective service whilst maximising sales and profits for the company. High quality customer care is seen to be central to ongoing success. The WSR PLC retail function is complemented by a number of matching retail operations in each of the stations as described above.

51. By comparison to other preserved railways of a similar size and complexity, the West Somerset Railway does not offer as wide a range of retail options as it might do. This is due to a combination of factors which include:

- lack of space to expand current retail activities at Minehead,
- the relative absence of non railway retail options at Bishops Lydeard one of the two main gateways to the WSR. This is due to be addressed by the Station Farm development, but that remains a long-term project,
- fragmentation of retail services across a number of different organizations,

- the lack of a coherent plan to enhance and optimize retail services with a clear set of commercial objectives which are shared across the railway,
- the age profile of the current volunteer workforce and the challenge of staffing retail outlets in the current economic climate.

Catering

52. The Catering Department has the following functions:

- Responsibility for Food Safety and Food Business compliance issues across the whole WSR.
- To provide quality catering for customers at a profit which can be reinvested in the Company.
- To help and guide other WSR organisations in developing strategies and plans for their food and catering outlets.
- To provide staffed on-train buffet cars for service trains and charters.
- To provide additional on train catering for parties, charters etc.
- To host and cater for special events such as weddings, christenings and corporate days out.
- To design and deliver profitable 'specials', normally with a catering element eg Murder Mysteries, Ale Trains, Cheese and Cider Specials etc.
- To provide a Café facility on Minehead Station.
- To provide catering supplies for other WSR departments and organisations as required.



53. As with Retail, Catering relies on a mix of paid employees and volunteer staff to undertake its activities. The Department currently has an administrative centre at Minehead in which to base its back-office functions. Additionally, it also has shared space with the Quantock Belle at Bishops Lydeard for catering storage including temperature controlled storage. Lack of storage capacity is an impediment to business development and growth as is the need for more food preparation and washing space.

54. On train catering remains a very popular component of the customer experience on the railway with a wide variety of food and beverage options available both on scheduled services and special events/occasions. Pressure on the buffet car stock means that the Catering Department would ideally like to see the purchase of a fourth buffet car to be able to offer on train catering to all scheduled services.

55. Arguably however, one of the biggest challenges facing Catering across the railway as a whole is the disjointed management of catering outlets across the WSR. Every station catering outlet is managed by its own 'friends' group and the BL outlet and QB operation are managed by the WSRA. The result can be unnecessary internal competition, conflicting strategies and plans which can lead to confused and disgruntled customers. An integrated catering strategy involving all relevant participants has to be achieved in order that the railway family as a whole can deliver a consistent quality of

service going forward. This will include setting minimum standards for catering services to be achieved across the railway regardless of provider.

Special Events

56. The WSR is constantly reviewing and updating its annual approach to special events in order to both anticipate and adapt to changing market conditions, customer preference and economic realities. Whilst the targeted special events such as Thomas the Tank Engine, Beer festivals etc. have been very successful, the commercial impact of gala events has not been as beneficial in recent times as the PLC would like. Whilst the running of galas will continue to be a showcase for heritage traction from other parts of the heritage railway network, the PLC will critically examine how these can be made more profitable. This will lead to changes in the way that galas are structured whilst continuing to maximize the appeal to heritage railway enthusiasts and the broader customer base alike. Consultation has also identified the desire to provide more photographic opportunities for enthusiasts and this will be explored further as will the possibility of a wider range of themed events..

Station Farm

57. Although the timetable for the development of the Station Farm project is yet to be finalized, the PLC will, as part of its project management approach, be looking at the commercial and marketing requirements that it will be seeking to establish alongside those of the West Somerset Steam Trust and the West Somerset Railway Association.

Marketing and Commercial Activities with External Partners

58. The WSR already has an extensive network of promotional marketing with external partners and this will continue to be maintained and developed over the lifetime of the Plan. There is one particular area of potential new business that the PLC wants to examine in more detail:

Butlins

59. Butlins at Minehead host in excess of 500,000 visitors per annum with a further 75,000 arriving for day trips/weekend or short stay breaks. The vast majority of these arrived by car with the balance using the bus service from Taunton. The PLC already has some sales and marketing relationship with Butlins, but recent discussions with the resort have identified possible opportunities for additional partnership. In the short term, Butlins wishes to promote the range of services it has to offer together with those available across the local leisure market in West Somerset and would be happy to explore this with the WSR. In the longer term, if the Taunton to Bishops Lydeard link were to be established, then the resort would potentially be interested in the possibility of through ticketing between the national network and the WSR with onward transport from Minehead Station to the resort.



Proposals from Support Organizations

Friends of Minehead Station

60. The Friends off at Minehead Station will continue to rely on fundraising in its own right with the major source of income being realised from the operation of the on-platform bookstall “Readers Halt”. The major problem with this operation is not the access to items to sell but in having sufficient volunteers to open the “Halt” on train running days.

West Somerset Railway Association

61. The WSRA believes that the following are key requirements:

- **New Markets:** New audiences for the WSR must be found as the generation that can remember the days of steam on the mainline sadly cannot live forever. A cognitive shift from the WSR as a showcase for engines to that of a genuine tourist attraction with a wider appeal must be made if the WSR is to survive. The synergistic effects of modern, co-operative advertising will be necessary to find the new audiences, and give them reasons to return to the WSR.
- **Uniqueness of WSR:** The WSR must be made to stand out from other heritage railways and area tourist attractions. Constant pursuit and openness to accept new ideas will be necessary, and finding ways to string area attractions together and turn day trips into longer duration holidays will be needed. This will require honest assessment of what the WSR has to offer, and teamwork between the Company and the WSRA.

62. The Association also wants to see improvements to the visitor experience including complete overhaul of the visitor reception facilities at Bishops Lydeard to bring it into line with for example, comparable National Trust properties. The WSRA considers that spend per visitor is not as high as it could be compared to what other similar tourist attractions achieve. The Association contribution to the Station Farm development [see below] will be a major step in this direction.

Somerset and Dorset Railway Trust [SDRT]

63. SDRT are the current custodians of the Washford station site and manage all the buildings including the Station, carriage shed and siding accommodation on which the Trusts carriage and goods rolling stock are stabled and/or under restoration. The Trust wishes to see Washford developed as a vibrant visitor attraction and wishes to work with the Company to identify the options and opportunities for taking this forward.

Diesel and Electric Preservation Group [DEPG]

64. The DEPG echoes a number of the contributors to the Corporate Plans in supporting the development of a wider range of facilities to attract and retain greater visitor numbers including its own site at Williton. It reinforces the need to put the visitor first and will be happy to work with the Company on initiatives that increase the attractiveness of the

WSR. DEPG advocates new restaurant and bar facilities together with a new shop at Minehead.

Friends of Watchet Station

65. Friends of Watchet Station are a well-established organization who have overseen and achieved a number of significant improvements over the past five to 10 years. In addition to overall responsibility for the Station area, the Friends also run the Shop. They see the present model continuing alongside secondhand book sales but would like the PLC to undertake an in-depth review of ticketing policy in order to make the journey on the railway more economically attractive to current and future visitors. Examples include special fares for specific trains for local families and for the events.

Friends of Bishops Lydeard Station

66. As a relatively new group, Friends of Bishops Lydeard Station have signalled that they wish to work with PLC to achieve greater press coverage/awareness of the railway particularly for special events. The Friends also believe that customer satisfaction would be enhanced if it was possible to position the rolling stock for the first departure of the day in Platform 2 to cater for early arrivals. This would help deal with the lack of covered space in the event of inclement weather [see Infrastructure below].

Strategic Statement

The Company will develop a new Commercial Services Strategy for the railway. Whilst managed and led by the Company, it will embrace the ideas and proposals from support organizations and seek to establish an integrated approach to marketing, promotion and commercial activities. The PLC will also create a new department for Commercial Services which will include catering, retail, sales and marketing and booking office activities.

Developing the Commercial Services Strategy

67. The key components will include marketing/sales, catering and retail. Key components will include:

Marketing and Sales

- Improving the information available to the Commercial Department from across the railway to enable it to continuously refine and enhance both the content and presentation of the customer offer.
- Improving the working environment of the sales and marketing team so that they can concentrate on their key tasks. This will require separation from the operational administrative base at Minehead station and the provision of alternative accommodation [possibly adjacent to the railway in managed office facilities].
- Securing additional staffing to grow the sales and marketing team. Any move in this direction would need to be self-financing in relation to increased income and covering of costs.

- Develop the Information Technology systems across the railway to enhance the ability to maximize ticketing, information management, use of social media and "best selling items" in relation to the sales and marketing functions. Introduction of new equipment for ticketing, computers at every location and increased use of online functionality to respond quickly to changes in market conditions and new opportunities.
- Review the current ticket pricing policy to ensure that there is a better balance between the customer experience and profit margin to maximize income and generate increased footfall across the railway.
- Developing a joint marketing approach with stakeholder organizations who use the railway including Butlins.
- Review the organization, structure and frequency of galas to maximize visitor/enthusiast experience whilst ensuring that these events remain commercially viable.

Retail

- Developing a plan for recruitment, training and retention of the next generation of volunteer retail staff.
- Examining options for increasing the overall retail space available at Minehead.
- Increasing the capacity of the shop at Minehead by improving shelving, presentation and storage.
- Improving promotion of sales and retail services through the wider Commercial strategy.
- Acquisition of a better till system which contributes to improved stock control and management.
- Improving the visitor/customer offer at Minehead through consideration of a pub/restaurant development and Visitor Centre.
- Developing a retail plan that embraces the activities of the "Friends" groups at all the other stations together with backup services around stock control, sales, joint promotions etc.
- Reaching an agreement with the WSRA around the future retail plan and management of the shop and café facilities at each end of the line.

Catering

- Continue to develop the customer offer at Minehead and on the buffet cars on service trains.
- Develop a plan for the future of dining car trains on the railway in conjunction with the WSRA. The preference is to reach a long-term commercial agreement on the use of the Quantock Belle set, but if this is not possible, to explore and implement other options.
- To contribute to the Station Farm development in terms of the proposals for WSR [or other organizations] options for enhancing catering services.
- To develop relationships with Friends organizations around individual station catering developments.
- To develop its volunteer staffing levels and to enhance the current training regime.
- Hold discussions with the WSRA around future commercial relationships with the café and shop at Bishops Lydeard.
- To increase the Department's price competitiveness.

- Continue to develop the catering component of special events.
- Expand the storage capacity and strengthen stock management across the railway.
- Ensure that the catering function continues to comply with statutory regulation including environmental health and other requirements.
- Develop the business case for a fourth buffet car for the railway. If agreed, proposals will feed into the rolling stock strategy [see Engineering and Rolling Stock].

Station Farm

- The PLC, alongside the Steam Trust and the WSRA, will need to determine what retail and catering considerations it wants to place [if any] within the Station Farm. The original concepts developed in 2007/8 which included a microbrewery, cycle rental facility, pub restaurant and other leisure amenities remain the only publicized ideas pending emergence of proposals from the Trust and the Association. This work will be undertaken within the Working Group involving the three partners.

Chapter 6: Infrastructure and Estate

68. The terms infrastructure and estate refer to permanent way, stations and buildings, land management and signal and telegraph. The WSR PLC currently leases the railway including all buildings, lineside equipment, signalling, permanent way and bridges from Somerset County Council. As indicated earlier, discussions are currently underway regarding an extension of the lease and it is hoped that these can be included before the end of 2013.

69. Although significant progress has been made with individual projects that have contributed to improvements to track and bridges, station platforms and other buildings more recently, the railway has not, in recent years, had a comprehensive planned approach to all aspects of infrastructure management. Proposals have largely emerged as part of the annual planning/budgeting process or they have been reactive to urgent/emergency situations that have emerged and which, if not addressed, would severely compromise the operational integrity of the WSR. This is not a sustainable position. Responsibility for infrastructure has also been somewhat fragmented with individual elements being the responsibility of different heads of department. In recognition of the need to strengthen management and stewardship, the PLC has recently appointed a Head of Infrastructure who has the overarching and professional responsibility for ensuring that all aspects of infrastructure management are increasingly dealt with in a planned and coordinated manner.

70. What this also means is that the PLC will need to establish a dedicated budget for short, medium and longer term infrastructure projects in the same way that it currently deals with locomotives and rolling stock. Whilst this puts additional financial challenge on the PLC, the requirement to ensure that the estate and facilities for which it is responsible are fit for purpose and meet all necessary statutory and regulatory requirements is a priority organisational objective in this Plan. Because there will be more projects than available funding, the PLC will establish a robust business appraisal process for assessment of particular schemes against agreed benefits criteria. Having done so, schemes will then progress to business case stage and be presented for approval. Details are set out in the section on Finance.

Strategic Statement

The PLC will develop an Integrated Infrastructure Strategy which will ensure that all aspects of the estate and facilities for which the organisation have clear proposals for planned preventative work and renewal, capacity enhancement, replacement/upgrading on a systematic basis consistent with agreed priorities, risk assessment and available funding.

71. The following paragraphs set out the main components of such a strategy.

ij] Permanent Way

72. The PLC has a Permanent Way Department which is responsible for the management, repair, renewal and development of track, lineside and immediate land management along the railway. This is a mixture of paid staff and volunteers. The WSR

has previously had an annual intention to renew/replace around 200 yards of track. This needs to be increased [see below]. Point work replacement is, because of cost, undertaken on a specific project basis only. The West Somerset Railway is a mixture of bullhead and flat bottomed rail. The Company has in more recent times installed more new flat bottomed rail on the main running line with bullhead rail being retained for station areas. The other alternative is continuously welded rail [CWR]. The cost of CWR has become progressively more affordable and cost-effective if one takes into account the fact that maintenance costs are up to 50% less than the bullhead rail equivalent. The WSR has also seen the benefits through independent inspection of rail by ultrasonics and of track geometry through dynamic measurement. It is intended to continue this with the assistance of Network Rail to enable a high standard of track to be maintained.

73. The level of track relaying is currently insufficient to keep the infrastructure serviceable. 1 mile per year of related track and replacement of between 1/4 and 1/2 mile of rail will be the new targets for the Company in order to maintain a 23.5 year renewal interval span. In addition, the wider infrastructure renewal programme will reflect the fact that sleepers are widely accepted to have a 20 year life span, fish plates 2 to 5 years, ballast 20 years [if well drained] and rail between 25 and 50 years. As part of the Infrastructure Strategy, the Company will also progress the following major schemes. It has to be borne in mind however that current assets are already being "sweated" and increased utilization is likely to increase maintenance demand further still. The costs of maintenance will need to be factored to future resource planning.



Williton Loop

74. The project to extend the loop at its southern end is under way and is due to be completed during 2014.

Station Farm

75. Planning and design for the three operational sidings that form the WSR PLC component of the Station Farm track layout is now under way. This will also require alteration to the point work and signalling arrangements at the southern end of the Bishops Lydeard station throat. As part of this process and now that the Triangle is completed, the PLC will be using the material delivered by Network Rail to stockpile supplies for ballast renewal and provision within the Station Farm "footprint" as well as other locations on the railway. If it is not possible to reach agreement with the WSRA on the use of the Triangle land for this purpose, alternative options will be sought.

Norton Fitzwarren Triangle and Platform

76. The completion of work on the Triangle in 2012 has enabled the WSR and charter trains to use it for turning locomotives together with continued deliveries of ballast by Network Rail. The platform is used for the August Steam Rally together with shuttle service normally associated with Gala events. Currently, the WSR has no plans to extend the operational length of the railway beyond Bishops Lydeard for regular scheduled services. Turning of locomotives and running an additional 7 miles for the purpose is both costly and operationally difficult. The absence of any passenger facilities at Norton Fitzwarren also reduces its appeal to travellers other than as an "out and back" ride from Bishops Lydeard.

77. The site is owned by the West Somerset Railway Association and it will be for them to determine how they want to take developments forward. As previously stated, the site has potential for a future park-and-ride facility connected to Taunton to Bishops Lydeard proposals, but given the investment being made in the Bishops Lydeard station site with the Station Farm development and the current operational limitations of the Triangle, the PLC is of the view that in the absence of a compelling business case which would need to include doubling of the track, WSR use of the Triangle and platform will continue to be for special events only.

78. Potential/required schemes that will need to form part of the debate around the emerging Capital Programme for the Integrated Infrastructure Strategy include:

- A more extensive annual trackwork replacement programme/strategy. This will replace the current half a mile a year regime with a 1 mile per year.
- A parallel process of renewals.
- Doubling between Bishops Lydeard and Norton Fitzwarren.
- Track relaying at Waterdene.
- Doubling between Dunster and Minehead.
- Trap points at Williton [both ends] to allow for simultaneous entry of trains into Williton station.
- Extension of the Northern headshunt at Williton station.

- Installation of continuous welded rail beyond Watchet Road Bridge to ease the impact of the curve and to improve locomotives tyre profiles. This is seen as a priority,
- Provision of a loop at Washford for engineering use and by Somerset and Dorset Railway Trust,
- Replacement of southern point work at Blue Anchor,
- Provision of trap points at Blue Anchor [both ends] as Williton above,
- Realignment/replacement of southern sidings at Minehead station together with relaying of the station throat,
- Platform loop/siding at Norton Fitzwarren platform [subject to discussion with WSRA],

79. A more distant aspiration and one of the lower priority would be the provision of a loop at Watchet if the proposed development at Washford was not possible. The PLC takes the view that these projects will not only safeguard the integrity of the trackwork along the railway over the strategic period of this Plan, but if the enhancement schemes are implemented, then there is no current case for reinstatement of either of the loops at Leigh Woods or Kentsford.

Proposals from Support Organizations

Friends of Crowcombe Heathfield Station

80. The Friends are strongly supportive of the reinstatement of the siding to the north of the station before the other bridge. The PLC is, in principle, in agreement that such a siding would provide additional track capacity for infrastructure trains and other operational benefits although pre-existing agreements with the residents of Baker's Orchard may preclude making progress with this scheme. The Company will assess the proposal as part of the Capital Programme for the Infrastructure Strategy. However consultation suggests that such a development is likely to be strongly resisted by local residents.



Somerset and Dorset Railway Trust

81. As part of the ongoing development of the Washford station site, the Trust and the PLC have started to hold discussions about the possibility of a loop being created off the running line by extension of the southernmost siding in the SDRT yard. This would facilitate both the ability to lock trains in at Washford particularly for infrastructure trains and heritage freight workings [there is no suggestion of a second passenger platform here] as well as improve the ability of the Trust to move stock around the yard. This too will be added to the Capital Projects appraisal and prioritization process.

Friends of Stogumber Station

82. The Stogumber Group would like to see the provision of a non-operational siding on the station building side of the running line for aesthetic purposes and the possible provision of static rolling stock display.

ii] Civil Engineering [Bridges, Level Crossings and Land]

Bridges and Level Crossings

83. The WSR PLC is responsible for the majority of bridges along the railway. Each of the bridges is currently inspected every 10 years for evidence of damage, corrosion, slippage or brickwork repairs. However, this frequency is now insufficient in terms of being able to respond to more urgent remedial work in the light of the impact of environmental and weather concerns. There is therefore a need for a refreshed programme and process for prioritization of repairs as part of coordinated planning in terms of capital budget expenditure which may span more than one financial period. Accordingly, the Company will establish such a process as part of the Infrastructure Strategy which will include a managed programme of preventative and remedial work in accordance with the previously stated appraisal and prioritization process.

84. Particular attention will be given in such a programme to the following areas:

- Bishops Lydeard bridge. Funding and completion of the traffic management scheme as part of the Taylor Wimpey commitment within the adjoining housing development.
- Steel bridges between Bishops Lydeard and Crowcombe Heathfield. Remedial work to eliminate corrosion on girders, joints and rivets.
- Tribble Bridge, Combe Florey. Maintain inspections due to persistent vehicle damage because of height restrictions.
- Churchlands Bridge. Provision of waterproof surface.
- Roebuck.AOCL. Realignment/Upgrade/replace level crossing equipment.
- Minehead level crossing. This is due for replacement by the County Council in the next few years. This will provide an opportunity to double track the crossing in preparation for doubling of the line from Dunster. It will also be necessary to relocate the open foot crossing adjacent to Butlins as part of this project.
- Maintenance and inspection of occupation crossings and footpath crossings.

Land Management

85. As part of its lease obligations to the County Council, the PLC is also responsible for the management and upkeep of the land immediately either side of the railway line. This includes around 50 miles of lineside fencing which presents a significant workload in terms of maintenance, renewal and third-party liaison. The other main challenges here relate to water seepage, drainage, culverts and land slips. There is a clear understanding of the main areas of concern which will be translated into a formal programme of remedial and preventative work under the Infrastructure Strategy underpinned by regular inspection and review. All work will take account of environmental and other considerations recognizing for example that the WSR passes through a number of County wildlife sites.

86. Currently, the main schemes for attention in the Integrated Infrastructure Strategy have been identified as follows:

- Water course and drainage including the Whiskey Trail culvert between Bishops Lydeard and Crowcombe Heathfield. To be dug out and relayed.
- General upgrading and levelling of the "cess" along the line where practical.
- Combating land slippage [requiring discussions with local farmers] between Bishops Lydeard and Crowcombe Heathfield.
- Flooding risk at Combe Florey.
- Fire risk management of foliage and banks at selected locations along the line.
- Weed control management at all locations with particular attention to the running line.
- Management of bank at Crowcombe Heathfield Southern Bridge to mitigate slippage arising from water draining from the road.
- Management of drainage issues at Crowcombe Heathfield Station arising from the local stream.
- Attention to the embankment at Roebuck Bridge including soil erosion.
- Management of land slippage behind the platform at Stogumber.
- Management of the flooding risk and water courses/culvert between the two bridges at Woolston Moor.
- Cutting back of vegetation in Castle Hill cutting.
- Management of Williton culvert to alleviate the impact of flooding in adjacent fields. This will probably require a further culvert underneath Williton Bridge.
- Management of the undergrowth and embankment at Doniford.
- Sampford Brett. Alterations to the stream which will require agreement with the Environment Agency about remedial work in order to avoid line slips. Approved drawings have already been prepared.
- Management of the potential impact of coastal erosion between Doniford and Watchet. Further significant slippage may require movement of the running line further inland and provision has been made for this in terms of land available within the lease. This may also include the need for rebuilding of the road bridge and purchase of additional land outside the current railway boundary.
- Vegetation removal and drainage management at Doniford Bridge.
- Attention to the landslip and water incursion problems in Washford cutting including cutting back vegetation.

iii] Stations, Buildings and Car Parks

87. The PLC intends to introduce a systematic programme of station buildings and car park management and to ensure that where these are leased to/rented by support organizations, that there is clarity of responsibility in any formal agreements about remedial/preventative/preservation and heritage work required and of the what timescale.

88. The major changes in this area during the lifetime of the Plan are likely to be seen at Bishops Lydeard with the Station Farm development and associated enabling works generated from the Taylor Wimpey housing development to the west of the station. However, there is also a significant amount work associated with buildings in particular elsewhere on the railway and a number of the support organizations have aspirations/proposals in relation to their activities which they wish to put forward for consideration.

89. One of the major immediate considerations for the PLC is the opportunity to acquire the Stationmasters house. This building which sits immediately adjacent to Platform 1 occupies a strategic location in relation to the Station Farm development itself which the WSR needs to safeguard. It also provides opportunities for a new income stream [the house is rented] or much-needed additional accommodation for PLC functions. The PLC has been given first refusal on purchase and by the time the Plan is published, the outcome should be known either way.

90. In terms of the other projects that are likely to emerge during the period of this Plan for inclusion in the Integrated Infrastructure Strategy, they can be currently identified as:

- Improve the car parking at Bishops Lydeard.
- Completion of the installation and operational readiness of the second Water Crane at Bishops Lydeard to speed up locomotive turnaround and reduce operational conflicts at the southern end of the station.
- Initiate an annual painting programme for buildings and of stations which are the direct responsibility all the WSR [in conjunction with the specific Friends Groups]. Ensure that all remedial/replacement work uses durable materials to increase longevity. Build in this requirement to all future lease/rental arrangements.
- Reach an agreement with the DEPG over the requirements for the preservation of the Grade 2 listed Goods Shed at Williton.
- Re-tarmac the platform at Dunster.
- Extend the up platform at Williton towards Doniford and moved the DEPG yard lead further north.
- Improve the power supply from the signal box at Blue Anchor to the camping coaches [the cost to be borne by the owners].
- Reinstate an inspection regime for all stations, buildings and facilities,
- Cover the currently roofless men's toilet and wash hand basin at Dunster,
- Update the Asset Register. This will include an asbestos register for all buildings.
- Identify alternative locations for the Signal and Telegraph and Permanent Way facilities and rolling stock in Dunster yard. This will enable the yard to be developed as a heritage goods yard for preserved freight and infrastructure rolling stock.

Proposals from Support Groups

91. The value of the work undertaken by each of the "Friends" Groups at their adopted stations should not be underestimated either in terms of its value to the railway or its importance to the upkeep of station buildings, facilities, grounds and gardens and immediate road access areas. This is particularly the case in relation to preservation of the heritage characteristics and individuality of each of the stations along the line. It is certainly highly appreciated by the PLC and the Corporate Plan is intended to enable the Groups to continue their dedicated work with more targeted and structured support from the WSR. This will be reflected in the Integrated Infrastructure Strategy.

Friends of Crowcombe Heathfield Station

92. The aim is to ensure that as far as possible the station retains an atmosphere and ambience of that of a GWR branch line station in the first third of the 20th Century. The view of the Group is that it is very difficult to see new opportunities at Crowcombe due to

the restricted site, Grade 2 listed status of the station building and lack of substantial car parking. However there is one opportunity, which might present itself, although the chances are very slim. To the rear of the main station building is a brick barn some 60' in length with some land in front of it. It is part of the curtilage of the large house behind, as yet unsold. It is just possible this might come up for sale or rent in the future and with planning permission would offer a variety of uses. Whether a business case could be made for such a venture is unknown at present as there are too many unknown factors. The Friends will keep this under review and bringing to the attention of PLC should circumstances change.

93. The Friends feel that there needs to be a greater footfall at the station, without losing its byway charm. Brown signs from the A358 seem to us to be a priority, and they are seeking the support and help of the PLC in negotiating with Somerset Highways. The station, as proven before, is an excellent backdrop for films, advertising etc. The challenge is that it is further from London than location managers would wish. The Group would like to work with the PLC to promote this location with advertising agencies etc.

94. The Group has also raised the question of re-instating the Goods Office that once stood behind the up platform where at present there is the tin Lamp Room. Preliminary enquiries have put the cost at in excess of £20K as the building was constructed in dressed stone, still available from one local quarry. Whilst this would meet the heritage objectives of the station, it is recognized that this would be too small for any practical use, other than expensive storage and therefore is unlikely to be an infrastructure priority. The other main objective for the Friends is to eliminate the 21st century as far as possible. This means that all signage, station furniture and even staff uniforms need to be consistent with the 1930 era. The last does incur costs to staff and maybe in the 10 year plan some form of loan scheme could be set up for uniforms.

Friends of Bishops Lydeard Station

95. Acknowledging the importance of the station as the principal gateway to the railway, the Friends have identified a number of potential improvements which they wish the PLC to consider in relation to infrastructure enhancement. One of the most serious and urgent is that of car parking which has already been identified above as a project within the existing capital programme being delivered by the WSR.

96. Beyond this, the Group are concerned about the limitations and inadequacies of the current toilets, particularly the female toilets where queuing is often evident particularly at major events. The absence of covered accommodation on the station itself with the exception of the café and shop is also felt to be a significant deterrent in bad or uncertain weather. A covered awning to the ticket office is also felt to be a necessary development.

97. Clearly, the Station Farm development incorporating as it does, emerging proposals for heritage carriage shed, expanded museum, archive and educational facilities together with extensive trackwork enhancement means that there is a limited amount on the improvement that can be sensibly achieved to existing facilities within the current site. This is recognized by the Friends who would like the opportunity to contribute to Station Farm discussions in due course. The Company also recognizes that the emerging Friends Group can provide a focus for communications around developments

at Bishop Lydeard engaging all the various organizations and individuals who have an interest in this exciting period in the station's evolution.

Friends of Blue Anchor Station [FOBAS]

98. FOBAS are concerned that camping coaches should remain a feature of the Blue Anchor scene as they have been since around 1935. They wish to see the Association tidy up and repaint the middle coach.

99. Replacement of the current untidy hedge north of the signal box with wooden palings is also an objective of the Friends. This would match the other palings adjacent to the level crossing and re-create the original appearance of this general area. FOBAS are in the process of taking over the former PW hut at the end of the car park behind the last camping coach. This will be converted into a work shop for maintenance teams of volunteers working for the station. There is also a need to replaster the inside of the ladies toilet, which has been damaged by a damp problem.

Friends of Watchet Station [FOWS]

100. The Friends see their primary aim in relation to the station and facilities as being to:

- Improve the station environment with maintenance work and decorating, extra picnic tables and garden terracing to enhance attractiveness and encourage more custom.
- Improve the original office for staff and management use together with providing a separate shed [perhaps modelled on a GWR Orioles store] for gardening and maintenance storage.
- Make the pagoda more comfortable and attractive to visitors whilst accepting that this may compromise some of the internal originality of the structure.

Friends of Minehead Station [FOMS]

101. FOMS main objectives have always been and always will be the preservation of the listed building that is Minehead Station. They include in that remit the building infrastructure as far as the Seaward Way road crossing. It does not include the buildings on the Engine Shed side of the track although the Friends treat sympathetically requests for assistance received from the company. The Group would like to see more improvement to the station area including:

- Replacing the fencing at the sea end of the Minehead Station.
- Constant identification of minor repairs and improvements to keep the station in a good and presentable state of repair.
- A regular programme of painting and remedial work which is sympathetic to the heritage nature of the buildings and facilities on the station.

West Somerset Railway Association [WSRA]

102. The Association has echoed points made by a number of contributors about the need to significantly improve the visitor experience at Bishop Lydeard both in the short term and, with the Station Farm development, maximize the opportunities available on

the site consistent with resources to be able to do as much as possible in a way which is reflective of organizations such as the National Trust.

Somerset and Dorset Railway Trust [SDRT]

103. Following discussions with the PLC in 2012/13, the SDRT is keen to renegotiate the present lease on the Washford site beyond 2020 and to develop the station further as a major attraction on the WSR. These discussions are already in hand.

West Somerset Steam Trust

104. The major project for the Steam Trust is the Museum development as part of Station Farm proposals. This will provide covered accommodation in phase 1 for five coaches together with exhibits, educational material and capacity for archive material (with other archives possibly being stored elsewhere). The lottery fund application is in preparation and the pre-funding phase is now being revised to ensure that it meets the criteria for local determination in terms of Heritage Lottery rules for funding to be completed in 2013. The main application will be made in 2016 subject to confirmation from the Lottery. Crucial to the success of the Lottery fund will be securing agreement with the PLC about the nature of the Station farm project, and particularly the length of lease or other agreement, which would need to be consistent with the lifespan of the project. This is recognized by the PLC and discussions will be initiated through the Station Farm Project Group.

Other Groups

105. It is known that various other groups along the line have an interest in stations and buildings and their use, for example, Taunton Model Railway Group at Bishops Lydeard. The PLC will continue to discuss developments with and support all the Groups involved in a variety of different ways but it is hoped that the Integrated Infrastructure Strategy will provide a formal route through which "Friends" and others contribution and ideas to this key area of railway business can be properly recognized.

iv] Signal and Telegraph [S&T]

106. The Signal Engineering Department is run by a mixture of paid staff and volunteers. It is responsible for ensuring that the signalling on the railway enables the WSR to safely operate and provides protection for road users at level crossings. The Department is responsible for most aspects of design, procurement, installation and maintenance of all fixed signalling and operational communications systems. This includes approvals from relevant regulatory bodies, consultation with the Highway and Local Authorities and production of Legal Orders for Level Crossings. S and T maintains all the Automatic Level Crossings, Gated Crossings, Signal Boxes, Ground Frames and Token sections on the Railway together with almost 20 miles of lineside cables.

107. The Slot Release Instruments at Taunton Station and Silk Mill (operated by the WSR Token carried by the WSR Conductor Driver) are owned and maintained by WSR and provide the direct interface to Network Rail's signalling system. The Department also manages the national railway telephone at Bishops Lydeard.

108. The age of the equipment and installations across the railway ranges from 2 to 106 years old with the Reed system life expired. The PLC does have an annual programme of renewal and repair and this will now be integrated into the Integrated Infrastructure Strategy process, planning and implementation.

109. Some of the challenges facing Signal Engineering over the next five to 10 years involve:

- Managing risk in relation to not renewing equipment as quickly as it is wearing out,
- The need for adequate funding to enable engineers to carry out the necessary level of spot renewals.
- The need for a more robust system to respond rapidly to failures.
- Striking the right balance between authorizing and funding enhancements and the ability to maintain them.
- Having sufficient paid staff with the right skills to overcome some of these challenges.
- Ensuring that statutory planning bodies recognize the risks and requirements associated with the need to upgrade and maintain infrastructure immediately adjacent to the railway and the need to consult WSR PLC on a regular basis.

110. The priority S and T schemes for consideration under the Integrated Infrastructure Strategy will include:

- Renew signal posts and mechanical fittings as part of an ongoing replacement programme – they are approaching the end of their lives.
- Complete cabling Blue Anchor – Williton.
- Review and renew automatic level crossing control systems.
- Implement more robust training and assessment activities to improve Department individual and collective efficiency and competence.
- Re-signalling the bay platform at Bishops Lydeard.
- Consideration of a tokenless block system north of Williton and potential re-signalling of Williton station.
- Provision of setting down posts on the northern side of the level crossing at Blue Anchor.
- Re provision of S&T facilities and rolling stock from Dunster Yard.
- Signaling re provision and upgrade in association with Minehead level crossing renewal.
- Development proposals for S&T accommodation and facilities as part of the Bishops Lydeard Strategic Site Development Plan

111. It is very clear that the interrelationship between the various elements of the Infrastructure role across the PLC is absolutely vital to future success and maintenance of a functioning railway. The appointment of the new Head of Infrastructure together with the development of the Integrated Plan with dedicated budgets and almost certainly a new organizational model for Infrastructure will be a major step forward. Nonetheless, the Board recognizes that S and T skills are at a premium and potentially, more capacity is required to address the likely future demands in this discipline.

Chapter 7: Locomotives and Rolling Stock

Locomotives, carriages, wagons and facilities

112. The ability to see, work on and ride on locomotives, coaches and wagons are perhaps the principal reason why so many people work on/volunteer for the WSR and are the most obvious draw and visual appeal about the railway for the travelling public. Like most preserved railways, the WSR has its own Engineering and Rolling Stock Department run by the Chief Mechanical Engineer. The role of the Department is to:

- Supply and maintain steam and diesel locomotives, passenger coaching stock and freight wagons for the operation of the railway. This is complemented by the work of the Diesel and Electric Preservation Group [DEPG] at Williton who are responsible for the majority of heritage diesel locomotives which see regular use on the WSR together with a number of private owner vehicles which are hired to the Company.
- Overhaul, repair and maintenance of all rolling stock.
- Provide train operating staff for footplate duties.
- Purchase, store and use steam and diesel locomotive consumables principally coal in the most operationally efficient and cost-effective way.
- Undertake mechanical repair and manufacturing work for other departments such as Permanent Way and Signal and Telegraph.
- Undertake external contract work for the locomotive owners and others where capacity permits.
- Maintain the infrastructure to provide the facilities for the above such as plant machinery, water towers, existing equipment etc.



113. A 09 diesel shunter has just been added to the fleet to undertake stock movements at Bishops Lydeard. This has been provided by 4160 Ltd.

114. The Department has a roster of available locomotives that are required to maintain the operational timetable every year. These are supplemented by visiting locomotives as part of galas and other special events together with charter trains. In all instances, Engineering is responsible for ensuring the operational readiness of rolling stock in accordance with agreed schedules. Rosters reflect the type and length of train to be handled. There already exists a long-term programme which is continually updated for locomotive availability, current maintenance, major repairs and restoration projects. This gives the WSR a very clear picture of what needs to happen in order to sustain their locomotive availability over the medium term.

115. Recent discussions have identified the need to apply the same long-term planning and investment process to ensure sufficient availability of carriages to meet future needs. The WSR operates on a tight supply of predominantly ex British Railways Mark 1 carriages supplemented by the diesel railcar and other specialist carriages owned by external support groups including those adapted for disabled use. There are PLC owned

buffet cars in regular service which are supported by the Quantock Belle dining car set owned by the WSRA and which usually runs as a separate train. The WSR normally expects to run seven/eight coach trains in normal timetables supplemented by one or two coaches at periods of high demand and/or preplanned special events. One of the emerging themes from recent marketing feedback is the need to increase facilities for disabled passengers. A further consideration is that many visitors prefer corridor stock to open compartments and this is something that the PLC will bear in mind in looking at future potential acquisitions.

116. As can be seen from any journey along the line, the WSR currently stores a significant amount of rolling stock which it either owns or belongs to other individuals/organizations. The railway is not rich in siding capacity and although this will to a certain extent be addressed by the Station Farm development and potential improvements at Minehead, the reality is that there is far too much rolling stock stored on the railway with little foreseeable chance of every vehicle being restored to a level and quality that owners would like to see. This is regardless of whether the intention is to make something operational or merely retain it as a static exhibit. Therefore, some difficult decisions are going to have to be made about the future of some items of rolling stock in terms of their continued location on the railway. This is particularly the case where storage will impede implementation of proposed projects to increase the operational capacity of the WSR.

117. There is already evidence of progress with the decision by the Steam Trust and the WSRA to install temporary trackwork at Williton next to the Swindon shed for the storage of GWR coaches for progressive restoration by the Trust.

Facilities

118. The principal locomotive engineering and rolling stock facilities together with a carriage maintenance shed are at Minehead, supplemented by the locomotive servicing compound at Bishops Lydeard. There are two other engineering bases on the line, both at Williton. One is run by the DEPG as its maintenance/restoration hub within the Good Shed and Diesel Shed. The other is run by the West Somerset Railway Association Restorations subsidiary and carries out contract work on maintenance/restoration projects for local support groups and other external organizations. All of these are currently run as separate activities. The railway currently lacks dedicated facilities for locomotive/carriage painting and this will need to be addressed as part of this Plan.

119. The current concentration of the locomotive and carriage maintenance facilities and capacity at the northern end of the line is a major constraint on operational flexibility, productivity and effectiveness. The current locomotive compound at Bishops Lydeard needs to be upgraded to a full locomotive running shed in order to cater for the WSR fleet but also for visiting locomotives that can be subject to light maintenance regimes and inspections prior to returning to their original destination.

120. The railway also lacks sufficient covered accommodation for carriage stabling to protect rolling stock from the elements. This will be addressed by the Station Farm development which will enable the three sidings being installed by the PLC to be covered [in keeping with heritage/preservation considerations].

121. It has long been recognized that the goods yard at Dunster requires attention and the aim of the PLC is to try and restore it to a "heritage" perspective which will allow it to become a central location for the display of the best exhibits of preserved freight rolling stock. This will mean that the Permanent Way and the Signal and Telegraph activities and storage areas there will need to be relocated. Dunster is the only goods yard on the WSR which has not been developed away from its original layout and appearance.

122. The absence of a dedicated paint shop facility is a major constraint when it comes to the collective approach to restoration on the railway. There are a limited number of options available to the PLC in terms of size and configuration of building. However, an option appraisal will be undertaken to identify potential solutions and proposals will be put to the Board for consideration.

123. The Company also wishes to improve its purchasing policy especially for safety critical components. A start has already been made with certain locomotive components but the principles process and management action required will be updated and extended across the totality of railway operations and integrated into the Safety Management System.

Consumables

124. The major issues here include:

- The availability of the right quality coal at an affordable price. The railway currently uses a combination of Welsh and Russian coal and is, like every other preserved line, subject to market volatility, price spikes and changes in availability. Coal represents the single biggest cost to the railway in non staff terms and in many ways, the most significant risk. The PLC will continue to develop its commercial approach to coal acquisition not least because differential types also bring challenges in terms of storage and longevity. Environmental considerations will continue to form a critical aspect in relation to supply choice, particularly in the reduction of smoke and sulphur emissions.
- Spare parts. Maintaining and replacing the working parts of locomotives and carriages is an increasingly complex area within a niche market in the UK and wider afield. The PLC has to be sure that it is on top of its game in terms of sourcing, costs, availability and predicted likely future supply. This means continuing to work in conjunction with other railways to secure best value in terms of critical mass and procurement and specification of future need.
- Materials. The PLC needs to ensure that it can use the best possible materials consistent with cost-effectiveness, availability and quality.
- Storage. Storage of consumables needs to be taken into account in terms of all the proposals to expand operational capacity, buildings, train service and other activities. Storage needs to be protective, secure and efficient.

Skills, Expertise and Training

125. These areas are addressed in detail in the section on Workforce and Training. The point to be made here is that the retention, succession planning and development of engineering and maintenance capability in heritage and preserved rolling stock is fundamental to the success and sustainability of the railway. The PLC takes this very seriously and sets out proposals for action later in the Plan.

Relationships with Locomotive and other rolling stock owners

126. Building and sustaining effective relationships with owners is of fundamental importance to the PLC. The railway could not operate to its current level without the availability of additional locomotives to supplement the home fleet. Current relationships are very good and there are a number of long-term agreements in place which see specific locomotives located on the WSR as their "home railway". These arrangements need to be built on and the Company needs to consider what further steps it needs take to secure long-term commitments and also to encourage short-term leases and agreements where required for specific purposes.

Creating an Integrated Engineering Vision

127. As has already been stated, there are three separate engineering and maintenance activities on the railway. Arguably, in the current economic climate, this is not making best use of skills, capacity, facilities or commercial opportunities. The PLC will therefore open discussions with the DEPG and WSRA Restorations over the future strategic intentions for their respective activities. There is no clear plan identified as yet, but the aim will be to see whether it is possible to further improve the engineering provision for the railway which, whilst preserving the individuality of each set of activities, provides for greater flexibility and economic benefit to all parties.

Strategic Statement

The PLC will develop two separate but aligned strategies. The first is an Integrated Engineering Strategy. This Strategy will cover engineering, workforce, facilities and organization and be developed [subject to their agreement] in conjunction with DEPG and WSRA Restorations. The second will be an Integrated Rolling Stock Strategy.

128. The Engineering Strategy will be developed to address the issues summarized in paragraph 127 above. Key elements of the Rolling Stock Strategy will include:

- Potential sourcing and purchase of further locomotives to bolster the home fleet and provide cover for long-term restoration projects where locomotive availability may be at risk.
- Continuation of current long-term restoration projects and planning for subsequent schemes.



- Review of the carriage fleet to ensure future fleet requirements can be met including mobility impaired passenger capacity.
- Review of existing acquisitions and disposal policy for rolling stock.
- Review and strengthen the policy for procurement of safety critical components.
- Development of a business case for the upgrading of the locomotive compound at Bishops Lydeard into a running shed.
- Development of proposals for Dunster goods yard incorporating re location of existing infrastructure activities to alternative sites.
- Review of existing motive power hire agreement template to ensure that it is both reasonable and commercially viable in the current economic climate.
- Review of the rolling stock asset register. Determination of future requirements and prioritisation for renovation/restoration of WSR stock beyond the current locomotives only programme. Reach agreement with all external owners on the future of stored stock on the railway.
- Development of proposals for covered accommodation for WSR operating sidings as part of the Station Farm Project.
- Review and updating of all existing operating hire agreements with external owners/organizations.
- Ensuring that the WSR remains compliant with all external statutory and regulatory requirements regarding the operation of rolling stock, engineering equipment and facilities.
- Continued refinement of the procurement process for parts and consumables. Having a robust framework for subcontracting work to outside bodies in respect of WSR stock and on behalf of owners.
- Developing the business case for the establishment of a dedicated rolling stock painting facility with options for location.
- Beginning discussions with the DEPG and the WSRA on the future use of the Williton engineering base as part of establishing the integrated engineering vision. This will include engineering functions, workforce utilization, commercial activities, procurement and supply chain and management arrangements.
- Aiming to strengthen current relationships with locomotive and rolling stock owners in order to agree longer term deals which provide the necessary resilience for future railway operations covering:
 - Analysis of the likely requirements of owners over the next five to 10 years.
 - Identification of commercial opportunities for future projects covering operations, maintenance, refurbishment and major rebuild [consistent with available capacity/skills].
 - Establishing what owners are looking for from the WSR PLC.
 - Review and agreement on individual contracts in line with Corporate Plan priorities.

129. The Company will also examine the possibility of fitting of retention tanks to its Mark 1 coaching fleet. By 2020, no trains on Network Rail will discharge raw sewage onto the tracks and this is an opportunity for the WSR to make progress in this important area in advance of national network compliance and potential legislation..

Proposals From Support Organizations

Dinmore Manor Group

130. Dinmore Manor Group has the following objectives as they relate to this Plan:

- Continue the current hire contract with WSR for loco 3850 until 2016.
- Fast track 10 year overhaul of 3850 and secure continuous hire to one or more heritage railways.
- Commence restoration of loco 2874 with the aim of completion well before the next overhaul of 7820 becomes due.
- Aim to have two locomotives on hire to heritage railways simultaneously to finance the overhaul/restoration of a third.
- Heighten the profile of the company both within the heritage sector (to ensure customers for their locos) and to the general public (to increase their supporter base).

131. It is clear from the above that the Group wishes to sustain its relationship with the WSR and the PLC over the long term. The Group does want, however to see some recognition of the cost of restoration reflected in the terms of any hire agreement. This point will be considered as part of the review process referred to above.

Diesel and Electric Preservation Group

132. The DEPG has confirmed that it wishes to continue its long-term partnership with the WSR PLC in the provision of diesel heritage traction both for scheduled services where required, participation in special events and in the "standby/rescue function". The PLC welcomes this commitment and has identified two areas for discussion with the Group:

- Future hire agreements and the projected requirement for diesel heritage traction provided by DEPG and,
- The future role of the Grade 2 listed Goods Shed. The lease is up for review/renewal within the next two years and there needs to be clarity about the extent to which restoration of the Shed will be achieved within that period or whether new arrangements need to be put in place. The Shed is in need of major repairs including re-roofing and a source of funds will need to be identified to achieve this.



133. Like many other contributors to the Plan, DEPG has also emphasized the absolute importance of retaining/replacing scarce engineering and mechanical skills to ensure that its fleet can continue to be seen operating on the railway.

Somerset and Dorset Railway Trust

134. The SDRT has identified its strategic objectives for rolling stock as being:

- Renegotiation of the continued use of locomotive 88 on the WSR.
- Restoration of all three Somerset and Dorset coaches and their eventual use on the WSR through a hire agreement.
- Continue the evolution of the Trust as custodians of material evidence of the Somerset and Dorset Railway including rolling stock, shunting displays and historical documentation.

135. The PLC is supportive of these aims and will work with the Trust to seek to achieve them.

West Somerset Railway Steam Trust

136. The Trust is currently focused on the restoration of up to 10 GWR coaches (five Churchward 'Toplight' coaches and four later Collet coaches) which includes the sleeping car (the only currently operational coach). In addition, there are three at Dunster, and six at Williton. Of the latter, the restoration to operational condition of the coach (6705) acquired from the US is the current Trust priority and where most of the volunteer activity on restoration by the Trust can be found. The priorities for the next three to five years will be:

- restoration and running of the GWR Coach (6705) alongside the Sleeping Car (9038) and
- restoration of the "Ambulance Coach" (3639) at Williton as the next of the eight vehicles to be attended to. This is because some donations are restricted to this coach and it remains on rail at Williton and easily accessible.

137. The Trust will also want to negotiate a hire agreement with the PLC in respect of coaches returned to operational condition as they become available.

West Somerset Railway Association

138. Discussions are underway with the Association with the aim of reaching agreement for 2014 and beyond around:

- Running Agreements for WSRA coaches.
- Provision of technical Support for the overhaul of 4561.
- A timescale for commencement of overhaul of 7821 (Ditchat Manor).
- Procedures for acceptance of new Quantock Belle vehicles and procedures for acceptance of future modifications.
- Agreement on the fitness to run of the Inspection Saloon, with the inaugural run planned to be on the back of the Christmas 2013 Quantock Belle. A commercial agreement has yet to be finalised, though it is hoped that a promotion to the benefit of both the Association and the PLC will be launched in readiness for the 2014 season.

Chapter 8: Regulation, Safety and Compliance

139. Regulation, safety and compliance represent three of the most important responsibilities that the PLC has in fulfilling its obligations in running the railway. The Company is authorized to run trains through a Light Railway Order [LRO] which is held by the County Council. Compliance with the LRO is mandatory and all sections of the railway are required to ensure that this is the case.

140. The WSR operates its own internal safety arrangements through the Safety Management System [SMS]. This is the main tool and information system used by the WSR. The individual sections set out all the necessary manuals/guidelines that staff are required to follow. Every member staff is made aware of and/or has a copy of SMS and the relevant sections are part of the introductory process to each Department and ongoing staff supervision. Each part of the SMS system reflects the statutory obligations issued by a range of organizations including Network Rail, Office of Rail Regulation, Rail Accident Investigation Board and the Health and Safety Executive. SMS deals with all aspects of safety, accident reporting, serious untoward incidents and "near misses" which are regularly recorded and acted upon by the management team. Accident and incident summaries are reported to the PLC Board at each meeting and the management team are held to account for ensuring that all the necessary actions are taken and that learning from experience is part of the way in which all staff whether they are paid or volunteers can ensure that they are up-to-date. The Board also has a Safety Audit Subcommittee which acts as the main forum for oversight and review of safety compliance on the railway.

141. The General Manager is the nominated point of contact for safety management and regulation compliance.

142. All staff who are involved with infrastructure and operations are required to undergo a competency programme in Personal Track Safety which is renewed every three years. All staff who are part of the respective Departments on the railway also have to go through their own professional training and competency regimes in safety and compliance.

143. There are of course major considerations in relation to health and safety, equipment handling, management of hazards and technical compliance requirements particularly in respect of engineering standards and rolling stock management, permanent way and signals and telegraph. All these factors feature in the training and development regimes of each department and in the competencies required of individual members of staff. These are updated as required to ensure that the railway can maintain standards which protect both staff, travelling public and the surrounding community.

144. The WSR also learns from the experiences [good and bad] of other preserved railways and the national network. There is regular interaction between the PLC and other heritage lines at management and professional discipline level to be able to share good practice and preventative measures. This includes learning from rail accidents and serious untoward incidents as well as sharing best practice. A lot of this work is coordinated by the Heritage Railway Association of which the PLC is a member. There is considerable partnership work with the national network in relation to the management

of trains and the exchange of technical know-how between the national system and the WSR. Knowledge transfer and expertise is reflected in Director level membership of the Board.

145. Regular inspections of the railway take place routinely and at regular intervals in a number of different forms. They include:

- Independent inspection of rail by ultrasonics and of track geometry through dynamic measurement.
- Inspections by the Office of Rail Regulation in relation to specific aspects of railway operations.
- Regular foot patrols to inspect permanent way.
- Statutory annual examinations of locomotive boilers and pressure vessels.
- Statutory annual examinations of various items of lifting equipment.
- Examination of Gas and Electrical installations.
- Annual inspection of fire protection equipment.
- Periodic testing of railway axles on passenger rolling stock and locomotives.
- Regular examination of bridges and other lineside equipment.
- On a slightly different note, Visit England makes an annual inspection of the WSR's position as a quality heritage attraction.

146. The PLC recognizes that maintaining and improving standards of practice, understanding and compliance across the railway is a continuous process that requires the commitment of staff at all levels supported by the Board in its decision-making on policy, strategy and investment. Therefore the Board makes the following commitment:

Strategic Statement

The PLC has a responsibility to ensure that all regulatory, safety and compliance requirements are dealt with in an efficient, sensible and effective manner. This includes the standards to which the PLC intends to adhere in relation to maintaining the railway to such as axle loadings, line speed similar to those used by Network Rail. The Board and the senior management team will therefore undertake a review of the SMS key areas and will agree action plans where standards and practice are felt to be in need of improvement. This will be coordinated with the new Training and Development Strategy [see next Section].

147. The Board has commissioned an external review of SMS by an acknowledged safety expert. The report was received by the Board in April 2014 and an action plan agreed to be overseen and implemented through the Safety Audit Committee. Further work will include updating the staff website on safety matters together with signal box safety equipment.

Chapter 9: Workforce, Training and Development

Workforce

148. The WSR is first and foremost a "people" organization without whom the railway could not function. In many ways this is one of the most important sections of the Plan because it sets out the way which the PLC will approach meeting the future demands for staff, skills and capacity together with the necessary training and development to underpin individual aspiration and application. The information that has been generated in the production of the Plan in relation to the workforce has identified the following key points in relation to the current workforce, the railway environment and the circumstances in which people choose to work on the WSR.



- Like many other preserved railways, the original enthusiasts and volunteers who had steam experience that helped create the WSR in the 1970s are reducing in number.
- The current economic climate may impact on the ability of people to give their time either free of charge or at the time or place that the WSR would like.
- The costs of volunteering are increasing particularly in respect of travel and/or accommodation. This is something that the PLC needs increasingly to consider.
- West Somerset has a low pay threshold compared to other areas in the West Country and more widely. The ability to attract and retain good quality paid staff with the necessary skills and expertise is therefore a continuous challenge.
- Workforce capacity ie has the WSR got enough staff, is becoming an issue with the demands of maintaining and running the railway to the frequency and intensity required.
- Succession planning and the ability to attract younger paid staff and volunteers to the railway will become increasingly important. The WSR has to think very carefully about the incentives and drivers necessary to attract the right kind of new people.
- Historically, the railway has largely encouraged people to work in the areas that individuals wish to specify. Experience demonstrates that the WSR perhaps has to be more directive/incentivizing in terms of deploying workforce resources to where the demand is greatest.
- There are some posts/roles, mainly on a voluntary basis which have proved difficult to fill in a sustainable way. Examples include Station Masters at the bigger stations. The PLC needs to find a way to address this issue in order to create stability and longevity where possible.
- Not every Department has a clear hierarchical structure where it is also possible for people to be "promoted" through the system based on experience and ability.
- There are major pressures on some paid roles in key areas of WSR business that require review and action to be taken particularly in the technical disciplines.

- The railway has to continuously create a meaningful experience for both paid staff and volunteers to encourage people to want to work on the WSR and to feel that they have been able to make a difference in terms of their contribution.
- The railway has to strike the right balance between professional practice and enthusiastic volunteering.

149. The WSR employs around 50 paid staff who are supported by up to 1100 regular volunteers [including the Company Board of Directors]. Paid staff are generally to be found in the management team, engineering and back-office/commercial functions. Volunteers are engaged in every aspect of the work of the railway.

150. Every contributor to the Plan has emphasized the importance of nurturing and developing the workforce. In the past four years over 500 new volunteers have gone through induction and been passed onto Departments or stations. The 2012 Census, although not attracting a 100% response, had indicated a retention rate of around 28% over 3 years and 45% over two years. So far in 2013, 40 new volunteers had undertaken induction and been placed.

151. There are some clear messages from the Census and other types of feedback around volunteer recruitment and retention that have come to the attention of the Board.

- It was clear that some volunteers felt that the culture on the railway is one that does not always promote and recognize the value of newcomers thus running the risk of creating a "them and us" situation.
- Costs were a key consideration for some particularly those who travel from long-distance.
- There was a perceived lack of interest from some Heads of Department and supervisory staff in the work that volunteers do and their development.
- Communications were poor internally and information about developments and key issues is not regularly or uniformly shared.
- Whilst friendly rivalry can be helpful, differences between the Northern and Southern ends of the railway often results in miscommunication, bad blood, buck passing and criticism of organizations and individuals in public which is extremely unprofessional and can present a bad image to the travelling customer.

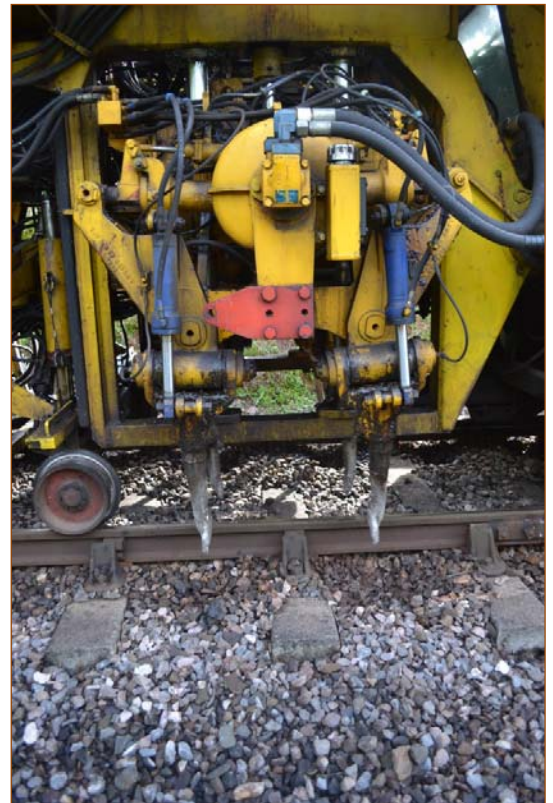
152. All of these points are of considerable concern to the Board and, even if only partially true, represent an unacceptable state of affairs which requires collective action. Of course, not everyone will always be satisfied all of the time. However, if the railway puts the visitor first in everything that it does, it must also recognize that the paid staff and volunteers are an equally important asset. Taken together with the wider information on workforce issues, the creation of the Corporate Plan provides the opportunity for the WSR to take an in-depth look at how to workforce development needs to move forward five to 10 years. The PLC will therefore commit itself to the following:

Strategic Statement

The PLC will work with its staff, support groups and external organizations with the necessary expertise to create a workforce strategy aligned to a new approach to training and development.

153. The key workforce components of the strategy will include:

- A review of volunteer recruitment policy and procedure including induction to increase the ability of the WSR to attract new entrants and retain their commitment. This will include a new approach to targeting key activities on the railway which require additional capacity through "streaming/encouraging" volunteers to priority areas whilst trying to meet individual preferences.
- Ensuring that every new member of staff whether paid or voluntary has a proper induction and is familiar with all the relevant statutory and safety compliance issues in their area of work.
- Establishing a clear process for ongoing training and opportunities for progression.
- Marketing the railway to outside bodies including educational establishments and promoting the positive aspects of volunteering.
- Establishing regular communications and updates on railway developments [see Section on Communications and Public Relations].
- Ensuring that there are arrangements for annual review.
- Strengthening the accountability and responsibility of supervisory staff in relation to workforce management and development.
- Review of supervisory grades in each department to ensure there is sufficient capacity in relation to workforce management and development.
- Identifying a Board level Director responsibility for workforce, training and development.
- Creating resources to support implementation and continuation.
- A requirement for Heads of Department and the Management Team supported by the Board to review internal communications, management style and practice together with cultural concerns and identify the necessary actions to address the problems identified above.
- Retention and development of Station Masters.



Training and Development

154. The WSR has a Training Department headed by a Training Officer. There is a Training Advisory Committee [TAC] which coordinates all training and development

activities across the railway. The Training Policy has recently been updated. The Training Department either runs or facilitates a wide range of courses, briefings and compliance update activities. This ranges from Personal Track Safety courses through to formal inspections by external bodies. It is the responsibility of the Training Department to ensure that all other Departments and Heads of Service have access to the annual programme of training activities on the railway or provided externally.

155. The key issues that have been identified for consideration in this Plan by TAC, the Training Officer and others cover:

- The need for a proper and realistic training budget supplemented by special allocations for specific purposes.
- All developments on the railway should include provision for training and development together with the appropriate resources.
- In order to be able to compete in the local employment market, the PLC should consider establishment of formal apprentice schemes including day release in conjunction with local educational establishments. This particularly applies to engineering and other technical activities for which formal qualifications are required.
- The need to strengthen the authority of the Training Advisory Committee and to the Training Officer in relation to training course attendance and compliance. Not all Heads of Department view this as importantly as they should. This culture needs to and will change.
- The need to integrate training and development activities with support organizations as required.
- Exploration of the opportunities to offer training and development tailored courses externally to other preserved railways and the national network on a commercial basis. Occasional courses are already requested by/offered to national network operators.
- Creating the conditions whereby Senior Managers and Heads of Department have sufficient time to engage with the training and development of their staff. This particularly applies to the technical areas where the specialist expertise involved requires Service Heads to either involve themselves directly or identify to TAC or the Training Officer how the necessary expertise can be procured.
- Review and update the Competence Management System to ensure that it reflects current and future thinking around management of and response to incidents.
- Design and implement formal Departmental training programmes.

156. Training is and will remain, a fundamental part of the Company's operation and needs to continuously evolve and develop. In order to be able to deliver the aims set aside above, the Company will commit itself to the following strategic objective:

Strategic Statement

In order to deliver on the above, the Company will review its current training activities and develop an updated comprehensive training strategy covering all aspects of railway activity building on the excellent work already undertaken by TAC and the Training Department. This will be linked to the previous statement on the acquisition, development and retention of the paid staff and volunteers to ensure that the railway maintains a well motivated, trained and committed workforce.

Chapter 10: Finance and Activity

157. The management of resources and continued achievement of financial sustainability is integral to the ongoing success of the WSR. Historically, the PLC has worked tirelessly to ensure that the railway is able to "pay its way" and by judicious use of recurring revenue and one-off financial contributions, has managed to balance its books on a regular basis and also generated surpluses for reinvestment in the railway

158. The WSR had an annual turnover in 2012 of around £2.3 million. This is derived primarily from railway related income supplemented by one off contributions. Around 75% of Company costs relate to staff with the most significant non-pay item being that of fuel.

159. The period over which this Plan is to be implemented presents fresh challenges and opportunities not only for the PLC but also for the support organizations who contribute to the WSR. All the charities and support groups are facing increasing pressures in relation to levels of donation, membership and fees and costs. Everybody is looking for ways in which to maintain the difficult balance between heritage, education and preservation and the commercial realities surrounding the operation of a line like the WSR.

160. The Board of the PLC takes the view that the WSR must increasingly operate both as a premier heritage railway and as a sustainable business. It cannot deliver the first without ensuring the second is in place. This will mean some difficult choices over the strategic period of the Plan around prices, cost management and control and levels of investment. It is also the case that the Board recognizes that with increasing competition for resources for a wide range of developments and other projects as outlined in the Plan, there must be greater rigour applied to decision-making and the process by which investments are agreed. The current system needs improvement and the changes required are described later in this Section.

161. In terms of passenger numbers, the WSR has maintained its overall position reasonably well. However, there is room for improvement and with the early indications of recovery in the national economy, the Board wants to set ambitious but realistic targets around the assumptions for future activity.

162. The Board also accepts that the organization does not undertake as much external fundraising as it should or could do. Historical reliance on shareholding investment, one-off donations [legacies, bequests, etc.] will not deliver the financial impact that future aspirations require either in terms of value or reliance on availability/timing. Recent successes by other preserved railways in the UK have illustrated the potential for working in partnership to achieve significant allocations from both governmental funds and other sources.

163. As can be seen from elsewhere in the Plan, there are a significant number of development proposals emerging covering all aspects of the railway. Some of these will be able to be undertaken in house at a reasonable cost that is controlled by the PLC. However the vast majority will require funding beyond the resources of the PLC to provide. Taunton to Bishops Lydeard is a good example of where the vast majority of any investment will have to be found externally. This will need to be a managed process

over the lifetime of the Plan. Developing the capacity to attract external funds either directly or in partnership with other organizations including local authorities who have the necessary skills and expertise around bidding and knowledge about funding sources will be a key future requirement for the railway.

164. Equally, the WSR has not benefited significantly from opportunities afforded by such as the Heritage Lottery Fund in relation to the local projects. The Station Farm development and the work being undertaken by the West Somerset Steam Railway Trust on a lottery application provides the opportunity for testing out this funding stream for a major scheme of this size for the first time as part of the partnership work with the WSRA.

Passenger Activity

165. In 2013, the WSR has planned and budgeted for 196,000 visitors. For future planning purposes, the realistic assumption is that an indicative target of between 200,000 and 226,000 people [204,000 for 2014] will be the basis on which budgets will be set and costs identified for both revenue and capital expenditure.



166. As has been identified in previous chapters of the Plan there is significant potential for passenger growth provided that the WSR is able to deliver the incentives and range of customer experience through the development projects proposed that will entice visitors to the railway on a regular basis. By far the most significant segment of passenger activity is the leisure visitor usually on a family basis. The PLC with its support organizations has to consider how best to market and present the "offer" such as to make these indicative targets a reality over the lifetime of the Plan. Clearly, these numbers will be kept under review and revised in the light of business performance.

Budgets [revenue and capital]

167. The WSR has an annual budget setting process which is part of the financial cycle initiated in autumn prior to the year to which the budget relates. There is a comprehensive mechanism for building revenue budgets including staff and non-staff costs and for ongoing scrutiny and management of expenditure in any given financial year. Capital expenditure is one area where there is no formal process currently [the exception being locomotive restoration for which long-term financial provision is required given the nature and timescales for such activity]. Heads of Department are given challenging but achievable targets in relation to managing resources, increasing income and areas of cost reduction by the Senior Management Team.

168. The annual budget is signed off by the Board in the Autumn and subsequent financial performance is monitored on a regular basis through the consideration of financial reports. This is supplemented by regular review and agreed actions in the

Finance and General Purposes Committee which is a subcommittee of the Board and includes both senior management and Board representatives. In relation to financial governance, the Board has an Audit Committee and external auditors appointed at every Annual General Meeting.

169. For an organization like a heritage railway, making predictions about income and expenditure levels up to and beyond the annual business cycle is a notoriously difficult thing to achieve. Passenger traffic, visitor levels and variable costs particularly in relation to fuel all contribute a level of volatility and uncertainty which makes financial planning particularly in relation to investment, an inexact science. However, what the PLC is clear about it is that it must achieve financial balance on an annual basis and that all considerations around budgetary management must be founded on that principle. The PLC will therefore aim to hold its cost base for the time being at 2013 levels.

170. In terms of income growth therefore, the PLC anticipates that this could be in the region of 1% to 2% per annum underpinned by a number of assumptions:

- Growth in passenger numbers derived from continued choice of the WSR as a leisure activity and driven by an improving national economy.
- Changes to the pricing policy and ticketing arrangements as outlined in the Section on Commercial Services.
- Extended marketing and development of retail opportunities in line with the proposed integrated strategy.
- Sustained management of costs, both fixed and variable, to reduce unnecessary wastage and non-core requirements.
- Careful scrutiny and decision-making around development projects [see below].
- Review and commercialization of leases, licenses and subcontracting arrangements [see below].

Capital Programme

171. While there is a list of projects awaiting implementation, the PLC does not currently have a formal capital programme which prioritises schemes against available funding. Funding is usually allocated after completion of the annual revenue budgeting cycle with schemes being agreed in year on an ad hoc basis in line with available resources. This informal approach to capital has to change because:

- The range of development proposals in the Plan requires the Board to adopt a more structured approach to decision-making which prioritizes schemes and allocates resources on the basis of clear criteria and benefits realization.
- The long-term nature of many of the projects particularly around rolling stock and buildings means that many financial commitments will run over a period of a number of years and the funding will need to be secured for the totality of any scheme [unless there are alternative arrangements in place].
- Whilst acknowledging that safety will always be a perfidy consideration, competition for resources within the PLC will be significant and it will be important for the Board to be able to demonstrate that there has been a fair and transparent process when reaching decisions.
- Any increase in partnership work and external fund holding will inevitably require commitment projections beyond the annual allocations cycle.

- Greater emphasis will be given to infrastructure investment over the life of the Plan.

172. A comprehensive capital programme covering all aspects of Company business will therefore be developed from 2014 onwards.

Business Decision Making

173. Alongside the development of a capital programme has to come a revised approach to business decision-making. The Board will ensure that in future capital developments and schemes with revenue consequences have to be accompanied by a formal business case to be signed off by the Finance and General Purposes Committee PLC Board depending on the investment level required. The Board will determine the thresholds for decision-making at subcommittee and full Board level. This system will be developed for introduction in 2014 including a full set of business criteria benefits realisation and other key tests to be applied differentially according to the size and nature of the project.

Leases, Licenses and Subcontract Arrangements

174. The PLC has a comprehensive set of arrangements in place with a number of support organizations on the railway and external partners. A number of these are historical and do not necessarily reflect the current environment in which the WSR has to operate. The Board recognizes the importance of maintaining relationships and goodwill and it is clearly the case that activities across the railway reflect a certain level of "give and take" when it comes to services and support. This is particularly the case with organizations which are registered charities.

175. However, whilst not wishing to lose the principle, the PLC must modernize and update its approach to leases, licenses and subcontracting arrangements in order to ensure that the economic value is reflected in commercial terms and that all these activities are put on a firm business basis. Therefore, the PLC will place all existing agreements, regardless of organization, type or length on a true commercial basis in order to maximize income opportunities, commercial development and improve control and oversight of subsidiary relationships with support organisations on the railway. This will cover:

- Undertaking a review of all current leases, rental arrangements etc. to establish their current and future status.
- Developing a robust model drawn from business, financial, commercial and other inputs.
- Assessing the extent and range of commercial opportunities consistent with review and renegotiation.
- Considering in-house opportunities for PLC from current external activities.
- Establishing a new formal management and oversight programme for all commercial agreements.
- Including proposals and implementation within the next three year business planning cycle [see below].

External Fund Raising

176. In line with earlier comments, the PLC will aim to enhance the capacity of the WSR to undertake fundraising and partnership development work to meet the strategic objectives of the railway under the Corporate Plan. This will involve:

- Developing an understanding that identifies the technical and corporate limitations and opportunities around the PLC as a fundraiser.
- Learning from other preserved railways e.g. Bluebell, Swanage, North Yorkshire Moors, Severn Valley with inputs from the Heritage Railway Association as to "how they did it".
- Considering membership of other existing Partnerships to further learning and development opportunities aligned to PLC objectives.
- Identifying capacity, skills and financial requirements to do this well.
- Undertaking a mapping exercise of all standard fundraising outlets drawing on experience from other railways, local authorities HRA and other sources.
- Linking emerging opportunities to strategic priorities from the Corporate Plan.
- Utilize the expertise and knowledge of local authorities in both identifying potential sources of external funding and seeking their support for making formal bids where appropriate.



Developing the 3 Year Business Plan

177. As part of the implementation of the Corporate Plan, the WSR needs to move into a three-year business planning cycle that enables the management team to implement some of the longer term priorities agreed by the Board. Accordingly, 2014 will see the development of the new planning process which will complement and absorb, the annual budget setting arrangements. This will also facilitate introduction of the new capital programme process. Year 1 will be firm commitments as is the case currently, Year 2 will be commitments and other proposals subject to confirmation of Year 1 outputs and financial performance and Year 3 will be commitments and aspirations. Each element of the cycle will be updated on a rolling basis in line with the requirements of the Corporate Plan.

Financial Management and Systems

178. The PLC has a comprehensive electronic budgetary system with nominated budget

holders who are provided with management information on a monthly basis. Although there is no formal system of commitment accounting as yet [this may be a possibility under the Plan], managers are not expected to break even/underspend on a monthly basis as long as they manage resources effectively over the financial year and deliver on major items of expenditure which are within revenue limits. There is no approved system of cross subsidy between the main budget headings across the PLC although managers are allowed to manage under/overspends within their overall budgets in year. There needs to be an improvement in executive management control and decisions in following up the trends and movements shown in the monthly budget comparisons.

Future Areas of Significant Financial Risk

179. All organizations carry a level of risk some of which can be directly influenced and managed and other elements which are outside the control of the WSR but nonetheless have to be considered in relation to contingency planning and response. The PLC has a risk management system for the railway but does not currently have a formal financial risk system. The major areas of future significant financial risk are considered to be:

- worn out infrastructure
- the need for individual departmental audit programmes
- fuel
- safety and compliance
- financial control
- lease compliance requirements
- impact of legislation
- age range, time commitment and experience of volunteers and the impact on paid staff and operational delivery
- climate change e.g. increased flooding, cutting and embankment slippage and coastal erosion
- insurance cover.
- pensions auto enrolment and staff take up

180. The PLC will put in place plans to mitigate the impact of these and other risk areas as they arise. Many of these issues are covered in other parts of this Plan and the intention is that the actions derived from implementation of change will have the direct beneficial impact on risk mitigation both in terms of financial and non financial matters.

Remuneration Policy

181. The Remuneration Committee is a subcommittee of the main Board. One of the areas of Company policy that needs updating is its approach to salary structure, benefits, annual and sickness leave. In April 2014, the Board approved a review of the salary structure of the PLC with a report expected within 12 months.

Funding of Locomotive Restoration Work

182. The Company will need to ensure that funds specifically earmarked for locomotive restoration over a long period of time are completely ring fenced to enable the locomotive component of the rolling stock policy to be sustained and to reduce any impact arising from complications in hire agreements.

Future Policy on Borrowing

183. As a not for profit organization, the Company needs to be very careful about the concept of borrowing money to fund developments or other activities. To do so will put a clear burden of responsibility on future Directors and managers. The Company therefore takes the view that all developments should in future be funded from existing profits, shares, and legacies and grants. The exception to this will be any project that is clearly self funding and/or has an immediate safety requirement to be met which is unavoidable.

Chapter 11: Partnerships and External Relationships

184. Although the WSR is one of the biggest preserved railways in the UK, it recognizes that to continue to be successful as a leading provider of leisure, tourism, heritage appreciation and education services in the local area, it has to do so in partnership with a range of other organizations. Many of these are local support groups which have extensive knowledge about the railway and have made valuable contributions to the Plan.

185. Another key group of partners can be found in the rest of the preserved railway network with which the PLC has very well developed and important links at both Board and management team level. This includes the Heritage Railway Association which is the overarching national body for the preserved railway fraternity. Locomotive and rolling stock owners represent a further key constituency that the PLC needs to work effectively with in order to sustain the ability to bring new engines and diesels to the railway on a regular basis including special events and to enable owners to continue to regard the WSR as their "home" railway.

186. The importance of managing relationships with the national regulatory bodies and the national rail network cannot be understated. Whilst these will always be arm's-length in nature, the ability to work effectively with regulators, Network Rail and Train Operating Companies is crucial to ensuring that the WSR continues to be a safe and well-managed system in which the national network has confidence in terms of compliance and doing business.

187. Commercial partnerships are a vital part of what the WSR needs in order to be a sustainable heritage railway. This includes technical relationships with suppliers and other railways, managing the procurement process and being able to share/exchange information, expertise and guidance with other preserved lines as part of a wider contribution to the heritage network.

188. The development of this Plan has provided the opportunity to refresh and renew relationships with other important local players including local authorities and MPs. The debate about Taunton to Bishops Lydeard has thrown up the opportunity to engage with new organizations such as Community Rail Partnerships and local authority working groups. Continued engagement of this kind will be important in terms of:

- Opportunities for learning and understanding/management of "political" processes associated with multiagency projects.
- Opening up potential routes and sources of external funding.
- Obtaining the backing of key decision makers for important/major schemes.
- Raising the profile of the WSR in relation to its role in the local railway network in the West Country.
- Improving the understanding of how preserved railways need to work, particularly with our relevant local authorities.
- Enhancing the understanding of external players in relation to the contribution of the WSR to local economic, environmental and tourism development in Somerset.

189. Developing external partnerships is not something that will happen without ongoing commitment and engagement. Accordingly, the PLC will:

- Appoint a Board level Director to take the policy lead on external relationships and be the point of contact at Board level.
- Continue with all external activities at management level but seek to strengthen these and make them more formal where required.
- Respond to the request from local support organizations for more formal interaction with the Board at least on an annual basis.
- Develop partnership working with other rail related organizations.
- Work with local authorities to determine what sort of ongoing engagement they would like to see,
- Establish a new Partnership Development Group as the overarching forum for stakeholder engagement and shared decision-making across the railway on matters of mutual interest. A proposal will go to the June 2014 PLC Board with the intention of creating the new Group with immediate effect.

Chapter 12: Communications and Public Relations

190. This is an area of the business where the Board acknowledges that there is need for considerable improvement. It has been aware that the historical arrangements on which both internal and external communications have been based on are longer sufficient to meet the needs of staff, support organizations, the media and shareholders.

191. A number of the contributors to the Plan have emphasized their desire to have more communication with the WSR and on a more regular basis. Many organizations are keen to understand how they can do more to support the PLC but in order to do this, they need to feel that there is a greater level of engagement and support.

192. The need to establish more effective internal communications and dialogue is absolutely crucial. Evidence suggests that "mixed messages" and misunderstandings have a material effect on the well-being of volunteers in particular, their understanding of the railway and what is required. This is particularly the case where segments of the railway are being managed by other organizations such as the WSRA. Effective communication will also impact on the cultural change required to move the railway towards the concept of "one railway" which has been an aspiration for some time, but so far, not achieved.

193. The WSR is also not very adept at projecting good news externally. Analysis of the specialist railway media would suggest that the WSR has a disproportionately small coverage compared to its contemporaries and that there is an imbalance between "negative" and "positive" stories. This is particularly disappointing when there is so much of a positive nature happening on the railway.

194. The PLC also has been slow to adapt to the opportunities and requirements of social media. Although progress has been made recently, there is much more to do particularly if the WSR is to attract the younger generation both in terms of visitors and the potential volunteers of the future.

195. The PLC has historically also been reliant on an external organization [the WSRA] for communication of much of its information about railway matters and developments to Company staff, external organizations and wider readership through the Association's quarterly magazine. As part of the review all of its communications processes, the Board will examine whether this is still the most effective way of the Company reaching wider audiences on a regular basis and to ensure that the information content needs of the PLC are being properly met.



196. There is recognition that this area is also a specialist one which requires a particular range of knowledge and skills and also leadership at Board level. Therefore the PLC will commit to the following strategic statement.

Strategic Statement

To enhance and sustain internal communications with shareholders, staff and volunteers and to establish the PLC story as the first point of reference. Develop a new approach to external public relations with the aim of ensuring that the PLC is able to project and communicate the work of the railway more effectively and to broaden the coverage and understanding of the WSR in the wider media system and amongst the public at large.

197. To do this, the PLC will:

- Appoint a Board level lead on PR and Communications with a mandate agreed by the Board following recommendations from the Forward Planning Group [existing Director pending Corporate Plan agreement and implementation].
- Appoint a specialist PR adviser to help formulate a press and communications plan. The purpose of the plan is to energize and develop external marketing of WSR PLC plans, developments and achievements to external sources [public, local authorities, local general media, national specialist railway media]. This will require identification of a new/extension of an existing budget.
- Make the Briefing from the Board a regular feature of post Board actions.
- Following the staff and volunteers meeting in September 2013, initiate a programme of staff/volunteer "surgeries" on a regular basis to be undertaken jointly by designated Directors and senior management.
- Consider establishment of a standalone Company PLC magazine of which the PLC has greater control in terms of content and editorial comment.
- Place more emphasis on development of its social media platforms and their use including improvements to the existing website.
- Establish more robust relationships with the railway press, key external partners and opinion formers including undertaking regular communications/briefings on key issues.
- Consider regular briefings of shareholders using a combination of the above techniques together with individual targeted briefings of influential opinion formers.
- Learn from the experience of other railways in terms of their approach to communications and public relations both internal and external.

Chapter 13: Corporate Organisation

198. The WSR is a Public Limited Company [PLC]. It has a Board of Directors [14] and a senior management team led by the General Manager which is accountable to the Board through the Chairman. In addition to the Chairman, there is a Vice Chairmen and Finance Director and Company Secretary together with a nominated representative from the WSRA. The Board currently meets monthly and has four subcommittees:

- Finance and General Purposes. This is the main interface forum between the management team and the Board and oversees implementation of all main Board decisions together with operational, commercial and financial performance.
- Audit. This oversees the financial governance of the organization and provides the link to external auditors.
- Safety Audit Committee.
- Remuneration. This sets the pay and conditions for employed staff across the PLC.

199. The PLC works to a formal Memorandum of Agreement and Articles of Association and is registered at Companies House. The PLC is required to comply with all legal obligations in relation to the Companies Act 2006 and its successors.

Shareholders and the Annual General Meeting

200. The PLC is controlled by its shareholders of which there are 7994, 4785 of whom are actively engaged with the railway. There is only one category of Shareholder. At shareholder meetings each shareholder present is entitled to one vote on any resolution to the meeting. However, a poll may be requested in which case voting is based on the number of shares held by each shareholder. Members are entitled to vote by proxy. Shareholders who have invested a minimum of £2000 [Silver Pass holders] and a minimum of £4000 [Gold Pass holders] receive extra travel benefits.

201. The total number of shares issued is 20,421,373 of which 18,387,398 belong to the active shareholders.

202. Historically, the PLC will only communicate with Shareholders before the AGM with the Annual Report and AGM papers. This follows a survey of Shareholders a few years ago.

203. Shares cannot be traded on the Open Market unless by Private sales. They can be transferred but a new Shareholder must own 1000 shares (10p per share) The Board give final approval to the number of shares issued and this is reported to the Board by the Company Secretary. The PLC has a Share Registrar [currently a Board Director] who is responsible for dealing with all applications, transfers and probate.

204. The Annual General Meeting takes place in June every year within six months of the financial year-end and all Shareholders are invited to attend. Directors and Auditors will be put forward for election on a roving programme basis. The process for running the AGM adheres to the normal conventions for such meetings and reflects the good practice in corporate governance that the PLC needs to practice.

Review of Corporate Structure and Management Arrangements

205. In 2013, the Board decided that it was time to review the corporate structure and management arrangements of the PLC. This was because it had become clear that the current structure was not best suited to take forward delivery of all the requirements that the WSR needs to achieve in the next 10 years particularly in conjunction with this Plan. At a seminar in February 2013, the Board set out and subsequently endorsed at a formal Board meeting, the following principles of organizational design which any new proposals are required to meet.



- Clarification of the governance arrangements through clear separation of the non-executive and executive functions of the PLC. Board members become Non Executive Directors.
- Delivery of the principles of good governance as set out in the Nolan/Cadbury proposals.
- Board Members are chosen for their skills and personal/ organisational fit with the PLC.
- Remuneration of Non-Executive Directors for expenses incurred on the PLC business
- Given the need to strengthen wider partnerships and treat all stakeholder organisations equally, the new Partnership Development Group will be established. This does not prevent representatives from any external stakeholder from attending Board meetings on request or by invitation to discuss specific issues with the PLC.
- Associate status on the Board will be reviewed as part of Phase 2 of corporate restructuring covering management arrangements. This will be addressed once Phase 1 is complete and therefore not before mid-2015 at the earliest.
- All Board members must have a specific portfolio with a role profile for which they are individually accountable alongside their corporate responsibilities.
- Strengthening of the management and leadership of the executive and heads of service functions within the organisation is a priority and any new models must be both sustainable and affordable.
- The Memorandum and Articles of Association must be complied with (or altered as required) in whatever structure is preferred.
- The Board is responsible for business and financial policy, strategic direction, regulation and corporate governance.
- The Executive focus must be on overall business performance, operational delivery, financial management, commercial and marketing, engineering and infrastructure and workforce requirements

206. The Board established a Working Group comprising the Chairman, Vice Chairmen and Lead Director for Planning and Organizational Development with a brief to develop proposals for change. The Board has approved proposals for first phase strategic change covering the Board and its immediate substructure. This will include identifying specific Director level responsibilities on the Board [which have previously been shared between managers and Board members] . It is anticipated that implementation will begin from Autumn 2014 and be completed sometime during 2015.

Developing the Human Resources [Personnel] Function

207. The Company is taking steps to strengthen its Human Resources [HR] function arising from the recent availability of additional professional personnel expertise amongst its volunteers. There is now a fundamental opportunity to review the existing function; agree a strategy and deliver an improved service backed up by policies, procedures and best practice as a key part of the business performance of the Company and to support the well-being of its workforce.

208. The strategy will see the HR profession at the centre of business performance. In the past `Personnel` delivered the fundamentals that underpinned the employee life cycle –including recruitment, induction and salary administration. Whilst these still remain part of the fundamental role, the changing business world means that the common theme of the HR function is also about supporting organisational performance.

209. HR needs to be recognised as a business discipline and encouraging managers to view `the people discipline` is crucial. Managers need to embrace people management and `own` the people related policies and procedures. Whilst managers have the operational responsibility for effective personnel management, they cannot be expected to do it alone and the HR function needs to work in partnership with them and staff to support, guide and advise line managers at all levels.

210. The key elements of the HR strategy will include:

- **Organisation design and development..** Advice on management structure, reporting relationships together with job descriptions and person specifications.
- **Employee relations.** To provide guidance and advice on policies and procedures; to keep abreast of changes to employment law to ensure company compliance; to carry out regular reviews to ensure best HR practice; to support line managers in effective implementation.
- **Employee Engagement .** To encourage the Company to recognise the importance of employee friendly policies; to link with efficient and effective utilisation of volunteers.
- **Resourcing and Succession Planning.** To contribute to manpower reviews; to support and administer the recruitment process; to provide guidance on aspects of working arrangements; to consider introduction of an appraisal [work review and development] process.

- **Performance and Reward.** To contribute to pay reviews and consider introduction of a job evaluation scheme.
- **Training and Development .**To design and deliver operational and personal development programmes, to include appropriate management development; to link to appraisal system. This will be undertaken as part of the Training Strategy development referred to earlier in the Plan.
- **Service delivery and information.** To prepare contracts of employment and subsequent changes; to interface with pension arrangements; to ensure all aspects of personnel administration are carried out effectively and efficiently – including maintenance and update of personal records and any associated data base, holiday sickness records etc; to provide regular reports on HR function and highlight items of special interest and for future action.

Strategic Statement

The Company will implement its review of the PLC first phase corporate structure at Board level by the end of 2015. Phase 2 management arrangements will then follow. Development of the Human Resources Strategy together with evolution of HR functions will continue during 2014 and beyond.

Chapter 14: Heritage and Preservation

211. This Chapter is deliberately placed towards the end of the Plan because it needs to reflect the heritage and preservation components of the proposals set out in all the other Chapters. The WSR PLC is committed to preservation of the heritage of that railway in all its forms and thus continuing with the outstanding work that staff, supporting organisation's and other individuals and groups have undertaken in the last 40 years.

Strategic Statement

"The PLC will ensure that there will be specific commitments developed and undertaken within its planning and operational work across the railway that maintains and in some cases, restores and enhances the preservation of the WSR heritage. This is not just the responsibility of the PLC but will be pursued in consultation with and involvement of, the wide range of stakeholders that have an interest in this area."

212. Moving forward, the PLC therefore will take the following steps over the lifetime of the Plan

The Built Railway

213. With regard to the existing buildings and structures the PLC intends to treat these as if they were listed by English Heritage as grade 2 status. Specifically, the Company will :

- Maintain the historical appearance [internal and external] of the railway
- Use traditional materials and if possible from the same historical sources eg local pink stone together with lime putty where this is practicable and economic
- Where modifications and/or alterations are essential, they are to be carried out sympathetically and using appropriate designs and materials (perhaps trying to anticipate what the GWR would have done if they were carrying out the work in the 1930s?)
- In relation to 20/21st century additions such as lighting, cabling, PA, security cameras and sensors and mobility access, we will ensure that these are installed discreetly and with care used to minimise visual impact (follow the examples of the National Trust and English Heritage)
- Adopt a similar approach to notices and signage
- Require all paintwork to be in GWR colours and dressings (Washford – SR and Dunster BR(W) excepted)
- Work towards all lineside plant associated with the railway eg turntable, water towers, water cranes, PW huts, fog signal man huts, pillboxes etc being restored, maintained and painted in appropriate colours and livery. Where possible original railway equipment to be reused where available.

- In respect of the line side we want the view out of the carriage window to enhance the experience of the passenger. Vegetation/ Fencing/ Junk should all be attended to in order to create the appropriate vista.

Maintaining and Preserving Traditional railway Working Practices

214. One of the fundamental reasons why volunteers and the public visit a preserved railway like the West Somerset is to experience and observe the maintenance and application of traditional railway working practices. The PLC is absolutely committed to this principle and as a result for the foreseeable future will require customer and passenger facing staff to wear appropriate uniform GWR, BR(W), WSR. However, the PLC would expect uniforms in modern materials to reflect style rather than insisting on originals and or some materials.

215. In terms of other commitments, some of the main areas are summarized below.

- Maintain the capability to use oil burning head and tail lamps
- Use correct traditional railway nomenclature (signalman not signaller, train not service, railway station not train station etc)
- Maintain the use/application of
 - Edmondson tickets
 - o -Operational water cranes.
 - o -Manual signal boxes.
 - BA level crossing.
 - o -Token instruments.
 - o -Guards flags/whistles.
 - o -Calling out station names.
 - Appropriate side shows where possible, visiting vintage car clubs, Minehead ice cream kiosk needs to stay but change in image.

216. All of these activities are seen as an essential part of the WSR experience and the offer of authenticity which the PLC and stakeholder organizations make to customers regardless of whether or not they travel on the Railway.

The Approach to Making Essential Alterations

217. It will be necessary in certain circumstances to alter or make modifications to the permanent way and works, buildings (internal and external), locomotives and rolling stock, and lineside equipment and apparatus. In these cases, archive standard records should be made and kept. Changing legislation which increases Health and Safety requirements needs to be regularly reviewed to ensure that the risk of legal action and

financial penalties is minimised. Quoting “grandfather rights” might not always be a defence for perceived inadequate safety provision.

218. A good illustration of the practical application of this policy comes in the area of future use of bullhead or flat bottomed rail. The PLC is in the process of developing a track renewal strategy and it has discussed the issues relating to continuing with bull head rail or renewing with flat bottom rail. In principal, it was agreed that in the future flat bottom rail would be used outside of station areas but that the WSR would continue with bull head rail within station and heritage areas.

219. The PLC will also pursue the maintenance and replacement of wooden sleepers track, semaphore signals and other historical signalling equipment in station areas and other publicly visible locations.

Locomotives and Rolling Stock

220. The main attraction for many visitors to the WSR are the locomotives and rolling stock used on the Railway. Whether these are owned by the PLC or other groups/individuals or running on the railway as part of special events, the Company will always endeavour to:

- Maintain stock in an appropriate pre-preservation livery, (or in a livery that can be justified and approved by the Board)
- Rebuild rolling stock using, where practical and economic, traditional methods, materials and design , with modifications only accepted where original cannot be justified on safety or access grounds. Overall external appearance is the most critical aspect whilst making every effort to preserve the traditional methods and skills as a legitimate and important heritage activity
- Maintain a cross section of railway vehicles of GWR, SDJR, BR(W) era ie steam, diesel, DMU, coaching stock goods and track plant
- Maintain WSRplc historic vehicles that are important to the history of the present company(eg the EWS wagon used for the Minehead coastal protection traffic)
- Maintain the traditional engineering skills and manufacturing processes , including the use of traditional railway tools and equipment .Where available original drawings and specifications to be sourced and used to ensure product is as close to original as practicable.
- Use Non service vehicles that are a part of the railway scene but which must be restricted to numbers that are practical. It is not necessarily an excuse to dispose of a vehicle simply because it is in a poor state of repair. The PLC needs to leave and mothball some projects for enthusiastic groups in the future.
- Use traditional internal furnishings, moquettes., wood, veneers, lighting etc.

221. In addition to vehicles and plant, the PLC wants to pursue the development of apprenticeships in traditional methods. Recruitment of volunteers (and paid staff) with the traditional engineering skills necessary is more and more difficult as those engineers etc. who are conversant with the technology reduces over time. The WSR has not been particularly good with the development and retention of apprentices and this is a factor requiring consideration. A strategy is required facilitate this aim. This will be pursue in any way which enables the PLC to:

- a) encourage engineers with the required skills to volunteer (and if necessary employ where a specific need has been identified)
- b) develop a meaningful apprenticeship scheme

Museums and Historical Artefacts

222. The PLC recognises that the WSR has less to offer by way of Museum experience and a range of artefacts than some comparable heritage railways. This is why the Station Farm Project in conjunction with the Steam Trust and the West Somerset Railway Association is so important. Nonetheless, the PLC will work with stakeholder organizations and groups to maximize display opportunities within existing buildings and settings and will be receptive to reasonable ideas that enhance the range of items that can be viewed.

223. Equally, the PLC understands the importance of acquiring, maintaining and preserving a wide range of railway artefacts that represent the GWR within the local setting in the West Somerset. To this end, the Board will examine the feasibility of establishing a historical artefacts asset register and will seek expert advice from a variety of sources as to how to this might be achieved. This will be a live document and if established, will contain statements and information about status and likely funding requirement and/or timescale for restoration.. A data base, library or pool of advisors from which project leaders can source information on what is correct is also required

Delivering the Policy

224. The proposals for heritage and preservation in this chapter will not happen merely by virtue of being written into the Plan. As part of its corporate restructuring programme, the Board will appoint a Director with responsibility for preservation and heritage issues who will set up a core planning group, enlisting members from the WSSRT, DEPG and WSRA if appropriate with responsibility for the guardianship of these matters. The PLC will also welcome input from support groups who will partner in this area,

225. This group will have authority and responsibility for the approval of “change” to the Railway. It will be a subcommittee of the Board with formal terms of reference and will be accountable to the Board.

Chapter 15: Outcome of Consultation, Implementation and Review

226. The Corporate Plan has been subject to formal consultation with the following stakeholders:

- All staff
- Shareholders
- External support organizations and individual groups and owners
- Network Rail
- First Great Western
- Somerset County Council
- West Somerset District Council
- Taunton Deane Borough Council
- Minehead Town Council
- Watchet Town Council
- Parish Councils
- Members of Parliament for Taunton Deane and West Somerset
- Heritage Railway Association
- Office of Rail Regulation
- Local media and specialist railway press.

227. The draft Plan was also posted on the WSR PLC website and publication notified through Online. Consultation lasted for three months with the responses being presented to the PLC Board in February and March 2014. Over 70 responses were received with almost all replies being of a positive nature with many interesting and helpful suggestions a number of which have been incorporated into this final draft.

228. In terms of implementation, the Plan will now be published and the Board will receive regular updates on progress. The key requirement will be to develop the first three-year business plan for the Company covering the period 2015 to 2017. This will contain the detailed proposals for change and development together with their timing and funding arrangements.

229. The business plan will be reviewed on an annual basis and updated to incorporate further elements of the Corporate Plan as part of the business planning cycle [usually late summer/early autumn]. The Corporate plan itself will be reviewed no later than Year 6 [or sooner if circumstances dictate].

Appendix

West Somerset Railway PLC

Schedule of Organisations/Groups Contributing to the Corporate Plan

Shareholders, Directors, Managers and Staff, West Somerset Railway PLC

Diesel and Electric Preservation Group
Dinmore Manor Group

First Great Western

Friends of Bishops Lydeard station
Friends of Blue Anchor station
Friends of Crowcombe Heathfield station
Friends of Minehead station
Friends of Watchet station
Friends of the West Somerset Railway

Heritage Railway Association

Iain Liddle Grainger MP
Jeremy Browne MP

Network Rail
Office of Rail Regulation

Somerset County Council
Somerset and Dorset Railway Trust
Taunton Deane Borough Council
West Somerset District Council
West Somerset Railway Association
West Somerset Steam Trust