



# Somerset & Dorset Railway Heritage Trust

## Strategic Plan 2024

### EXECUTIVE SUMMARY

---

This document sets out the Strategic Plan of the SDRHT looking forward from 2024, the year in which it was produced. The Strategic Plan reflects on the current situation, including the background to how this has developed, looks at where the SDRHT, in the form of the Trustees, believes it should be heading and how reaching these objectives is envisaged to be achieved.

The Strategic Plan has drawn on previous similar documents, consultation with working members, and consideration of examples of similar documents from other relevant comparable organisations.

The SDRHT's objectives are defined over short (12 month), medium (5 year) and longer terms. The rationale for each objective is stated and the priorities associated with each objective are also defined.

In summary, the short-term objectives are:

- 1) Maximising the use of and value from the existing assets of the SDRHT.
- 2) Completion of ongoing major railway projects to which the SDRHT is already committed:
  - a. Somervale sidings;
  - b. Acquisition of 9F;
  - c. Acquisition of Sentinel loco (from SDRHT member), or alternative steam locomotive in running order which is:
    - i. judged suitable for the SDRHT and Company's purposes, including the maintenance and storage facilities currently available; and
    - ii. available for purchase; and
    - iii. within the SDRHT's available funds (including those raised for the original purpose which remain available).
- 3) Establishment of project teams and generation of project plans (including funding plans) for principal projects to be delivered over the medium term:
  - a. Tunnel Lane developments;
  - b. Staged extension(s) towards Chilcompton;
  - c. Restoration of 9F.
- 4) Rolling Stock acquisition and restoration.
- 5) Land purchases of track bed between leased station area and in-filled cutting.
- 6) Opportunistic acquisitions and other investments to support longer term objectives – as listed under the following headings.



In summary, the medium-term objectives are:

- 1) Railway developments within existing corridor:
  - a. Tunnel Lane;
    - i. Maintenance /restoration facility;
    - ii. Passenger halt;
  - b. Running line;
  - c. Station site.
- 2) Railway and other developments outside the existing corridor:
  - a. Staged extension(s) towards Chilcompton e.g. on some or all of the "Redan curve" land acquired, including leisure path use alongside any railway reconstruction.
- 3) Restoration of 9F to full working order (for heritage railway operation, i.e. not to main line condition).
- 4) Rolling stock acquisition and restoration:
  - a. Locomotives:
    - i. Historically significant;
    - ii. For operational /maintenance purposes;
  - b. Passenger carrying vehicles;
    - i. Historically significant;
    - ii. For operational /maintenance purposes;
  - c. Freight vehicles;
    - i. Historically significant;
    - ii. For operational /maintenance purposes.
- 5) Opportunistic acquisitions and other investments to support longer term objectives, as listed under the following heading.

In summary, the long-term objectives are principally around extensions, primarily towards Chilcompton, following on from the corresponding item within the previous time frame. Given the scale of the challenges to be overcome before anything resembling the original railway alignment is made continuous between Midsomer Norton (MSN) and Chilcompton, it may be reasonably assumed that activities to achieve this will still be ongoing well beyond 5 years from the date of this plan (i.e. by 2029).

The Strategic Plan also recognises the likelihood of long-term objectives around developments within the existing corridor which could relate to developments associated with the running line (e.g. further double-tracking and/or installation of run-round facilities in the vicinity of the proposed Tunnel Lane Halt), or further developments to the station site which could include revisiting some of the proposals included within the Outline Planning Application previously developed. There are, at present, no specific proposals to document in this category for this long-term planning horizon.



## CONTENTS

---

Executive Summary .....	1
1 Introduction .....	4
2 Where Are We Now? - Current Situation .....	6
2.1 SDRHT .....	6
2.2 Company.....	14
2.3 Summary of current position (SDRHT and Company):.....	17
3 How Did We Get Here? .....	19
3.1 Brief History.....	19
3.2 Previous Plans.....	20
3.3 Grants.....	21
4 Where Are We Going? .....	23
4.1 Short term (+ 12 months) .....	23
4.2 Medium term (+ 5 years).....	31
4.3 Long term (+ >5 years).....	35
5 How Will We Get There?.....	38
5.1 Short term (+ 12 months) .....	38
5.2 Medium term (+ 5 years).....	42
5.3 Long term (+ >5 years).....	42
5.4 Financial Strategy.....	43
6 How Will We Know How We're Doing? .....	45
7 How This Plan Was Developed. ....	46
8 Appendices.....	47
8.1 Appendix 1: inputs and outputs for strategic plan consultation workshop: 18/5/2024.....	47
8.2 Appendix 2: Table of Contents from previous Strategic Plan (2018-2028) .....	48



## 1 INTRODUCTION

---

The Somerset and Dorset Railway Heritage Trust (SDRHT) is based at Midsomer Norton South (MSN) station, one of a few surviving examples of the stations which existed along the former route of the Somerset and Dorset (S&D) Railway between Bath and Bournemouth, plus the original line between Burnham on Sea and Evercreech Junction, where the two former routes met.

The SDRHT is a charitable organisation (ref. 1045547, registered 5/4/1995) and registered company (ref. 03038464, incorporated 28/3/1995) with the basic objective of preserving the history of the S&D, through the restoration, to the status of an operating “heritage” railway, of a part (or parts) of the S&D infrastructure, plus associated assets. The charitable objects of the organisation, as set out in its Memorandum and Articles and quoted on the Charity Commission register entry, are as follows:

“(1) THE PRESERVATION, RESTORATION AND USE OF ANY SECTION OF THE FORMER SOMERSET & DORSET JOINT RAILWAY CALLED IN THIS DOCUMENT “THE RAILWAY”. THIS TO INCLUDE TRACKBED, STATIONS, BRIDGES, VIADUCTS, CULVERTS, CUTTINGS, OUT BUILDINGS, ADJACENT LAND (E.G. WOODLAND) AND ANY RUNNING STOCK THAT THE TRUST MAY BUY, STORE, BORROW, OR LOAN.

(2) THE PRESERVATION AND DISPLAY OF HISTORIC ARTEFACTS, RELICS AND DOCUMENTS OF THE RAILWAY OR RAILWAYS IN LINE WITH THE COMPANY’S ACQUISITION AND DISPOSAL POLICY.

(3) THE CARRYING OUT OF RESEARCH INTO THE HISTORY AND OPERATION OF THE RAILWAY OR RAILWAYS GENERALLY, THE STUDY OF LOCAL HISTORY IN RELATION THERETO AND THE PUBLICATION OR OTHER DISSEMINATION OF THE RESULTS OF SUCH RESEARCH AND STUDY.

(4) THE EDUCATION OF MEMBERS OF THE PUBLIC ABOUT THE HISTORY AND OPERATION OF RAILWAYS GENERALLY AND THE RAILWAY IN PARTICULAR.

(5) THE PROVISION OF RECREATION FACILITIES IN THE INTERESTS OF SOCIAL WELFARE WITH THE OBJECTIVES OF IMPROVING THE CONDITION OF LIFE OF SUCH PERSONS WHO HAVE NEED OF SUCH FACILITIES BY REASON OF THEIR YOUTH, OLD AGE, DISABILITY OR SOCIAL CIRCUMSTANCES; AND

(6) THE PROVISION OF EDUCATIONAL AND TRAINING FACILITIES FOR THOSE ENGAGED IN THE RESTORATION AND OPERATION OF THE RAILWAY OR RAILWAYS IN GENERAL”

This document sets out the Strategic Plan of the SDRHT looking forward from 2024, the year in which it was produced. The Strategic Plan reflects on the current situation, including the background to how this has developed, looks at where the SDRHT, in the form of the Trustees, believes it should be heading and how reaching these objectives is envisaged to be achieved.

The Strategic Plan has drawn on previous similar documents, consultation with working members, and consideration of examples of similar documents from other relevant comparable organisations.

The Trustees consider it important to set out the SDRHT’s plans, both to meet their obligations in delivering the SDRHT’s charitable objectives but also to provide a framework for future investment and management decisions including achieving those good governance practices recommended by



the Charities Commission and the Office of Rail and Road (ORR), via the Risk Management Maturity Model (RM<sup>3</sup>) and the guidance notes/safety standards promulgated by the Heritage Railway Association (HRA).

The purposes of the document are:

- To set out the SDRHT's objectives over short (12 month), medium (5 year) and longer terms, and their rationale.
- To provide context for these objectives, based on a reflection of where the organisation and its activities are at present and how this has come about.
- To summarise how the SDRHT's objectives are envisaged to be achieved, considering dependencies, risks and opportunities; and identifying what the priorities are expected to be.
- To identify where key stakeholders' support will be required to enable the SDRHT to achieve its objectives and the steps necessary to develop closer relationships with them.
- Overall, to provide the foundation for delivering the longer-term financial viability of the SDRHT.

The document is also expected to:

- fulfil the conditions of the leases which the SDRHT holds, particularly that applicable to the station site.
- provide a supporting basis for future grants and funding bids to external organisations.

The SDRHT's majority owned subsidiary company, the Somerset & Dorset Joint Railway Company Ltd (the "Company") is responsible, on behalf of the SDRHT, for the direct management of train services and commercial operations. This document is also expected to provide guidance for the Company's decision making.

This plan will be reviewed annually.



## 2 WHERE ARE WE NOW? - CURRENT SITUATION

---

### 2.1 SDRHT

The SDRHT manages the station site at MSN, including the railway assets such as track and signalling and a running line extending south from the station area for a distance of approximately 1 mile along the former S&D trackbed towards Chilcompton – where the neighbouring former station site existed. There is no running line in the other direction, with both tracks terminating at the northern end of the station platforms.

The station buildings consist of many of the original buildings which survived and some, including the signal box and its adjacent greenhouse, which have been recreated; the originals having previously been demolished.

There is a small maintenance and restoration facility based in and around the former goods shed, which is rail-connected to the main operating lines, and this area includes road-rail access for the delivery and removal of rail vehicles for use on the railway. The railway has no rail connections to other rail infrastructure.

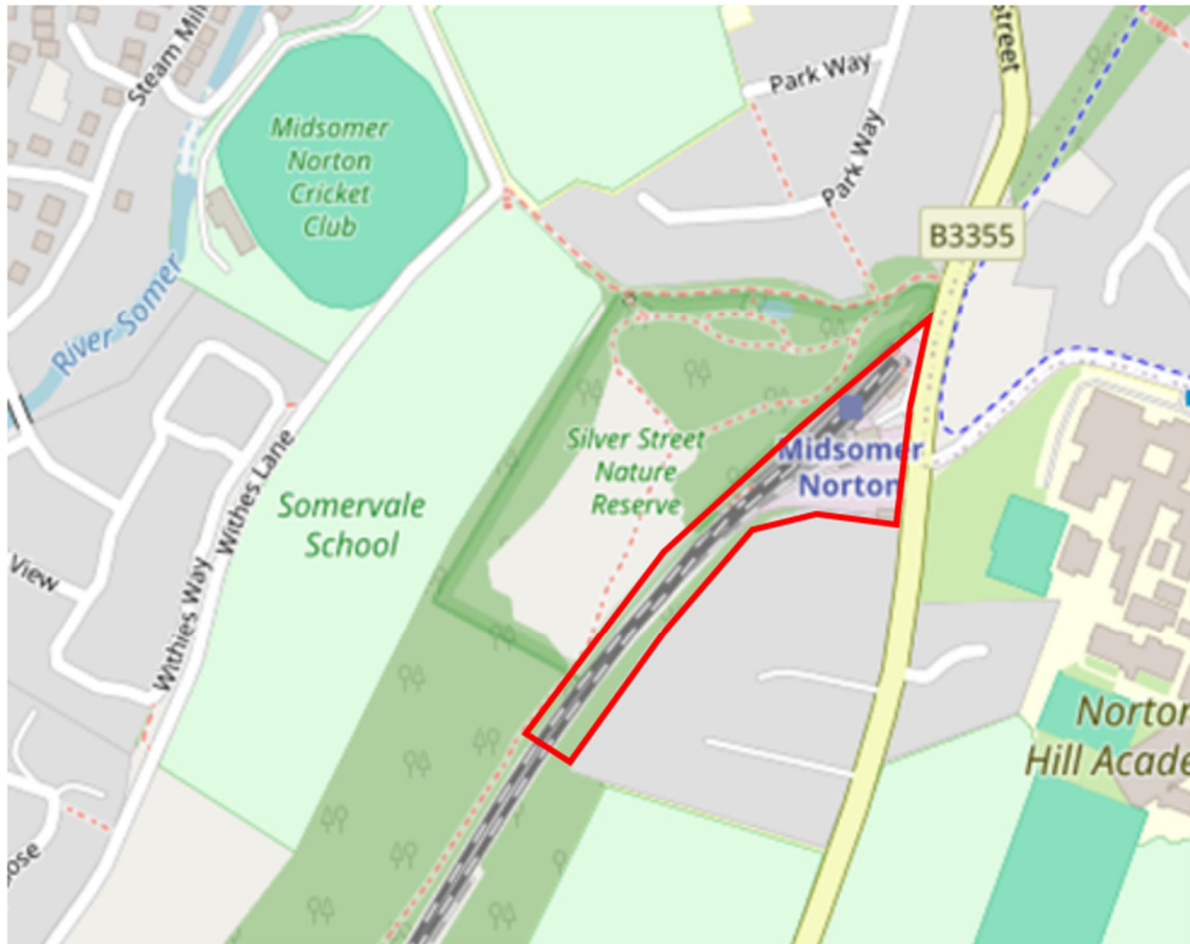
There is an additional siding (the Engineer's Siding) adjacent to the down line (towards Chilcompton), used for storing vehicles and materials and the first ~450 metres (around 22 chains) of running line, together with the station site itself, is double track, as it was through most of the S&D's existence as part of the national network. The remaining ~950 metres (around 47 chains) of running line is single line, largely following the course of the former down line (towards Bournemouth).

The SDRHT has created a museum on part of the station site in what were originally stables associated with the railway. The museum includes an adjacent World War II era Anderson air raid shelter and Pill Box. The museum houses many historical artefacts associated with the S&D, including both articles owned by the SDRHT, most notably the collection of Roy Brown which was donated in its entirety, and items which are on loan to the museum. The picture below shows the interior of the museum:



Retail facilities and refreshments are provided in a combination of the main station building and a number of rail vehicles stored on the station site for this purpose.

The SDRHT leases the station site, including all the buildings, from the Bath and North East Somerset (BANES) Council on a 99-year term from 2017. The terms of the lease include a number of requirements and/or constraints which the SDRHT has to meet. The area covered by this lease is shown approximately in the diagram below (the red outline) – for a more accurate indication of the boundary, see Land Registry Title ref. ST 243265:



[Copyright and Licence | OpenStreetMap](#)

The running line has been re-constructed on a mixture of land which the SDRHT has purchased and that which it leases from two local families and the Duchy of Cornwall.

The SDRHT also owns some parcels of land adjacent to the former S&D trackbed which are earmarked for future developments, principally to enable the construction of additional sidings and maintenance facilities.

In addition, the SDRHT has recently (at the time of writing) purchased a ~750m (around 0.5 mile) stretch of the former S&D trackbed beyond the end of the existing running line towards Chilcompton. This is not continuous with the existing running line, being separated by the former Chilcompton Tunnel and the cutting leading to it which has been in-filled. Note: The in-filled section of the Chilcompton cutting is owned by the Duchy of Cornwall, whilst the twin bores of Chilcompton Tunnel are owned by the Historical Railways Estate - the tunnels are both currently leased to a local gun club. The land acquired extends from close to the southern portal of the Tunnel to the Redan underbridge (still extant but not included) within Chilcompton village, it does not include the former Chilcompton station site. The land is referred to as the Redan curve. The acquisition also included a substantial field adjacent to and east of the trackbed.





The majority of the rail infrastructure assets present throughout are owned by the SDRHT with a small portion of the rail in the yard owned by the Company.

The rail vehicles present are a mixture of those owned by the SDRHT (which form the majority) and those which are owned by individuals/groups of individuals – generally members of the SDRHT. The SDRHT owns small diesel locomotives, carriages and wagons. It does not own any operational steam locomotives. However, there is currently one small steam locomotive resident on the site, a Sentinel, albeit currently non-operational; this belongs to one of the SDRHT members. The SDRHT is also in the process of acquiring a part-restored British Railways 9F, currently owned by a group led by one of the Trustees, with a view to completing the restoration of the locomotive for use on the S&D – this type being associated with the last years of the railway prior to closure – and elsewhere.

The general policy of the SDRHT is to recreate the appearance of the station and railway during the 1950s – widely considered to be the S&D's heyday – and this is reflected in the decoration of the buildings and accessories and the principal choices of rolling stock and the liveries carried. An example view of the station during the period which the SDRHT is focussing on is provided below:





The SDRHT is also responsible for the maintenance of the assets it owns and which it leases: this includes vegetation management, buildings maintenance and maintenance of all the railway assets referred to above. The SDRHT currently holds no responsibility for maintenance of any significant civil assets such as bridges, tunnels or viaducts.

A major set of possible developments, particularly focussed on the station site, was identified prior to and during 2019 and submitted to BANES as an Outline Planning Application (OPA). In summary this sought in-principle approval of the following:

- New Maintenance Shed (up to 700 m<sup>2</sup>).
- Extension to existing maintenance shed to provide ancillary café, retail facilities and meeting space (up to 90 m<sup>2</sup>)
- Extension and refurbishment to existing WC building (up to 10 m<sup>2</sup>)
- Education and Training Room and Site Office (up to 80 m<sup>2</sup>), with Museum above (up to 80 m<sup>2</sup>)
- Workshop building (up to 120 m<sup>2</sup>)
- Change of use of former stable building to form 2no. 1 bedroom tourist accommodation units. Associated extension and external alterations.
- Associated landscaping work.

Consent was provided on 20/11/2019 ([Applications for Planning Permission - 20 November 2019.pdf](#) ([bathnes.gov.uk](http://bathnes.gov.uk))) as “permitted development”, subject to several reserved matters which would need to be addressed prior to any full planning consent being provided, for any, or all, of the proposals covered by the OPA. The consent was time-limited to 3 years and hence expired in November 2022. The original plan around progressing the various concepts within the OPA was based on it enabling the SDRHT to secure substantial grant funding from external organisations. In the event, the effects of COVID-19 prevented this progressing as planned and no further progress has been made with the exception of the first item listed below. Nevertheless, the work undertaken in obtaining outline planning consent (OPC) can be used both to inform future planning, including this Strategic Plan, and in providing some precedent to support the approval of future similar planning applications.

Future developments which the SDRHT is currently pursuing include the following:

- Construction of sidings on land acquired by the SDRHT adjacent to the west of the running line, just beyond the limits of the station area. This land is known as the Somervale site. A planning application has been submitted to the local authority (BANES) and, at the time of writing, resolution of issues arising is ongoing. The application is for a significantly reduced version of the equivalent component in the OPA discussed above.
- Construction of a halt towards the southern end of the existing running line. No planning application yet submitted. However, some initial design and specification work has been undertaken, including an assessment of the risks associated with siting a halt on the gradient which applies at this location (~1 in 50 or 2%).
- Construction of a larger, purpose-built, maintenance facility on land acquired by the SDRHT adjacent to the east of the running line towards its southern end. This land is known as the



Tunnel Lane site: Tunnel Lane being the nearest public road, which crosses the former trackbed above Chilcompton Tunnel, referred to above. Status as per the halt referred to above.

The SDRHT currently has 8 Trustees (from a maximum permitted number – defined in its governing document – of 9. Of the 8, 4 Trustees hold specific defined Trustee roles:

- Chairman and Vice-Chairman
- Treasurer
- Secretary

The current organisation chart, including both the board of Trustees and the other principal leadership positions within the organisation, is included on the next page:



Somerset & Dorset Railway Heritage Trust														
	Chairman Stephen Lacey	Vice-Chairman Roger Burfitt	Secretary John Baxter	Treasurer Malcolm Barton	Trustee Phil Jones	Trustee Barrie Papworth	Trustee Joseph Cosgrave	Trustee Keith Bottomley	Trustee Vacant					
Direct Reports:														
CME (Traction and Rolling Stock) Barrie Papworth	Head of Signalling Stuart Garner	Head of Buildings Phil Jones	Head of Gardens Vacant	Head of Permanent Way Trevor Hodge	Head of Personnel Vacant	Land and Planning Manager Vacant	Project Development Team Stephen Lacey Brian Litherland Roger Burfitt Joseph Cosgrave	Legal Lead Vacant	Publicity Vacant	Head of Fundraising Vacant	Telegraph Editor & Production: Stephen Lacey Roger Burfitt	Museum Curator Roger Taylor	Webmaster Patrick Stevenson	Social Media Contacts Keith Turk Stephen Lacey



There are currently 950 members of the SDRHT, which has no permanent paid staff, although contract staff are engaged for certain specific tasks on a paid basis.

Of the members, there are approximately 50 working volunteers at the time of writing. The roles covered include the following general areas, some of which fall within the Company's scope of responsibility – see next section:

- Management of health, safety and wellbeing;
- Railway operations, including signalling;
- Events planning and management;
- Rolling stock maintenance and restoration;
- Buildings maintenance and restoration;
- Grounds maintenance, including garden areas;
- Track maintenance;
- Retail and catering;
- Museum;
- Administration;
- Governance, including finance;
- Development, including expansion and acquisition;
- Marketing;
- Fund-raising.

Key roles and responsibilities are described in a set of Railway Instructions (current listing ref. PA001).

The allocation of responsibilities between the SDRHT and Company is defined in one of the Railway Instructions referred to above (ref. CS010).

The SDRHT is responsible for the safety management of the whole of the railway operations as set out in the Safety Management System (SMS) required by the Office of Rail and Road (ORR). The running of the railway uses a nationwide digital management and compliance system (HOPS) which is endorsed by ORR and the HRA and this is effectively managed by the Company and Trust in combination.

Note: in any railway inspection it is the Trust's Secretary and not that of the Company who is served with any legal notices, such as Improvement Notices.

The SDRHT's income is comprised of the following:

- Membership subscriptions.
- Donations from members or others, including via legacies.
- Gift Aid on both of the above.
- Operating surplus generated by the Company.
- Any grants obtained.

The SDRHT's outgoings are principally:



- Operating costs such as fuel, rent and insurance.
- Costs associated with expansion and development, including purchase of land or other assets and fees for associated professional services.

A summary of the SDRHT’s income and expenditure over the most recent 3 years, as recorded in the Accounts filed with Companies House, is provided below, for information:

Year ending 31/3/	Income	Outgoings	Net Income (Expenditure)
2023	£105,750	£111,691	(£5,941)
2022	£114,415	£71,641	£42,774
2021	£106,759	£81,178	£25,581

## 2.2 COMPANY

The Company is registered (ref. 06993870) and currently has 4 Directors, 2 of which hold specific defined roles:

- Chairman
- Company Secretary

It also has a number of defined management positions which are shown in the Company’s current organisation chart which is included overleaf:



Somerset & Dorset Joint Railway Company

Chairman Matthew Cornborough	Secretary Stuart Garner	Treasurer Patrick Stevenson	Director Phil Jones	Director Roger Taylor	Joint Company/Trust Rep <b>Vacant</b>
------------------------------------	-------------------------------	-----------------------------------	------------------------	-----------------------------	--

Head of Operations Kevin Drake	Head of Safety & Compliance Tony Aldred	Retail Manager Roger Burfitt	Catering Manager Sue Trott	Marketing Manager <b>Vacant</b>	Events Manager <b>Vacant</b>	Schools Liaison Manager <b>Vacant</b>
--------------------------------------	--	---------------------------------------	----------------------------------	---------------------------------------	------------------------------------	--



The key items related to the Company's financial performance over the most recent 3 years are summarised below, extracted from the Accounts files with Companies House:

Year ending 31/3/	Income (Sales)	Costs	Surplus donated to the SDRHT
2023	£92,500	Not available	£4,300
2022	£85,000	Not available	£22,000
2021	£25,339	Not available	£7,534

The Company plans and operates train services and associated events utilising the assets owned/managed by the SDRHT and those additional assets, such as hired steam locomotives and other rolling stock, which it considers necessary, or beneficial, to enable these services/events to take place.

The Company pays for the use of assets, including those owned by the SDRHT, and generates income from ticket sales, retail and catering activities.

The Company's operating cycle is annual and, in general terms, falls between March and October, with the significant addition of extensive operations in December, in the lead-up to the festive season.

A condition of the SDRHT's lease of the station site is that the number of operating days (with trains running) is limited, at present, to the following (from BANES Planning Decision ref: 22/00089/VAR):

"Train operations serving members of the public shall be restricted to:

- i) Weekends and public holidays only during the months of April - October (inclusive) and the month of December;
- ii) Any day classed as a recommended School Holiday Day within the Bath and North East Somerset Council Area;
- iii) The hours of 10.00 to 17.00;
- (iv) Up to 35 additional days in a calendar year between the hours of 10:00 to 17:00 and up to ten evenings between the hours of 17:00 to 22:00. Written records of these opening dates shall be recorded and made available for inspection by the Local Planning Authority on request.

No operations serving members of the public shall take place on other days or months nor at other times."

Aside from other limitations, around the availability of sufficient volunteer staff, this provides a constraint on what the Company is able to undertake.

The Company is responsible for supporting the SDRHT in the safety management responsibilities outline in section 2.1, with a particular emphasis on those aspects associated with operating the railway.





## 2.3 SUMMARY OF CURRENT POSITION (SDRHT AND COMPANY):

The SDRHT and Company have identified the following strengths, weaknesses, opportunities and threats, this includes the output of the consultation exercise described in section 7 and Appendix 1:

- Strengths:
  - Our catering and retail (shop and emporium) operations are well staffed and generate useful income;
  - We deliver a high-quality visitor experience (e.g. museum, signal box, pill box, Restaurant Miniature Buffet (RMB) carriage, themed events, festive trains, friendly and welcoming staff);
  - We offer attractively priced services and events compared with the larger railways;
  - We have enthusiastic volunteers with good morale;
  - We are 100% volunteer run;
  - Our Telegraph magazine is consistently recognised as being one of the better such publications in the UK heritage railway sector;
  - The school visits we offer receive good feedback.
- Weaknesses:
  - The railway is dependent on a few volunteers some of whom fulfil multiple roles;
  - We have no resources to encourage the recruitment of younger volunteers;
  - Our volunteer resource is very low compared with pre - the Outline Planning Consent (OPC);
  - We have inadequate facilities to own and operate our own steam locomotives;
  - The two organisations (SDRHT and Company) are not always fully aligned as regards objectives and priorities;
  - We lack in-house expertise in areas such as fund-raising, civil engineering, planning applications and legal matters;
  - We need more facilities to retain visitors on site for more than an hour or two.
- Opportunities:
  - We have some funds remaining from a major legacy to prime some projects;
  - We can become a key part of the local area regeneration plans;
  - We have a substantial market potential within 1 hour's drive of the railway, both for volunteers and customers;
  - There are few tourist attractions in the local area and the railway at Midsomer Norton is therefore significant;
  - It has been recognised that heritage railways bring economic benefits to the local area as concluded by an All Party Parliamentary Group report into the value of heritage railways <https://gat04-live-1517c8a4486c41609369c68f30c8-aa81074.divio-media.org/rother-valley/docs/rvr-31.pdf>.
  - The Somerset & Dorset Railway is widely acknowledged by the railway fraternity as being one of the most lamented of the lines closed during the 1960s and has a large following which we could exploit better including legacies and regular donations.
- Threats:
  - The SDRHT is not always able to cover its operating costs from revenue;



- Discontent amongst some working volunteers due to alleged poor communications;
- The purchase of the 9F has caused some discontent particularly around perceived unavailability of legacy funds for other purposes;
- Visitor numbers and passenger footfall has been much reduced in 2023 and subsequently;

The work which underpinned the OPA discussed above highlighted the following as key areas which needed, or which would benefit from, further development:

- Parking
- Office and meeting spaces
- Catering facilities
- Retail facilities
- WC and Restroom facilities
- Spaces and buildings with adequate disabled access
- Storage space for rolling stock away from the station area.
- Lack of covered accommodation for work to be undertaken on carriages and locomotives i.e. a loco shed.

This work also emphasised the significant benefits to the longer term aims of the organisation which would be expected from adopting a more outward-looking approach (i.e. engaging more with the local community and recognising the opportunities which could be exploited which are not primarily, or even significantly, related to the railway, or railways more generally: these include opportunities for revenue generation from enhanced facilities which would support onward investment in the railway).



## 3 HOW DID WE GET HERE?

---

### 3.1 BRIEF HISTORY

The S&D closed in 1966 and, whilst some parts of it were retained for freight operations for a limited period beyond that, was largely dismantled over the following 3 years. The railway infrastructure at the location of the SDRHT's activities (i.e. around MSN station) was dismantled during this time frame. Following closure, the former railway land was sold off in separate packages and the station site itself was acquired by the local authority (then Wansdyke District Council) and used as a base for educational activities; first by Somervale School as an Outdoor Centre then by Radstock College as a Youth Training Centre in the Further Education sector.

The originally titled Somerset & Dorset Railway Trackbed Trust was first mooted in 1992 and incorporated from 1995 as both a charity and company limited by guarantee. It secured a short lease on the disused Midsomer Norton Station site, from what was then Wansdyke District Council, in 1996 and began repairs to the station as a small static railway museum. Plans developed for an operating heritage railway with an extending running line towards Chilcompton.

The project accelerated in the early 2000s with a new 25-year lease from what had become BANES Council on the station site. Planning permission was approved for full restoration of the station with a short working railway, which was aided by the award of a major regeneration grant and plans for an extension southwards on further sections of leased land.

The Trust was renamed as "The Somerset & Dorset Railway Heritage Trust" (SDRHT), and the project as the "The S&D Railway Mendip Main Line Project", to reflect the ambitious plans to extend the line.

Progress with the restoration of the site based around MSN station may be summarised as follows, principally based on the previous planning stages documented in the OPC referenced above (note: this is an abridged list):

- 2001: Restoration of railway station and development of working heritage railway with museum and visitor facilities
- 2009: Extension of operational heritage railway and engineering works, including track-laying and associated infrastructure
- 2012: Extension of existing heritage railway to the south of the station to include reinstatement of double-track railway, drainage, fencing and lineside path.
- 2018: Completion of the full current length of running line of ~ 1 mile, to the base of the Chilcompton Tunnel cutting infill.

The Company was formed in 2009, based on the view of the Trustees at that time that, as the scale and scope of activities at MSN increased and – particularly – train operations began, governance of the overall project would benefit from separation of operational responsibilities and accounting from responsibilities and accounting associated with development, expansion, restoration and acquisition of assets, for example. This decision was based on a review of the experiences of other relevant organisations.



Other S&D related preservation groups exist as follows:

- The Somerset and Dorset Railway Trust (SDRT): this group was originally formed around the Radstock station area, the next station north of MSN, prior to demolition. However, the initial preservation attempts were unsuccessful and the group relocated to Washford on the West Somerset Railway where, until recently, it was based subsequently. Following departure from the Washford site, many of the assets of the SDRT including a large S&D locomotive are currently (at the time of writing) at the Mid-Hants Railway, whilst some have been acquired by, or loaned to, the SDRHT. Further details are available here: [Somerset & Dorset Railway Trust | Locomotives, carriages and artefacts \(sdrt.org\)](https://www.sdrt.org/)
- The North Dorset Railway Trust (NDT): this group is based at the Shillingstone station site which it has been restoring, on a similar basis to the SDRHT's activities at MSN, since 2005. Further details are available here: [Homepage | North Dorset Railway, Shillingstone, Blandford Forum, Dorset, DT11 0SA](https://www.ndrt.org/)

### 3.2 PREVIOUS PLANS

The SDRHT's previous Strategic Plan was produced in 2018 and set out what was envisaged at that time during the 10-year period up to 2028. The previous Plan itself built on previous similar documents which it listed as follows:

- An initial Business Plan (1999 to 2004)
- A first Strategic Plan 2005 to 2015

The initial Business Plan formed part of the input to a successful bid for £67,000 worth of funding from the Single Regeneration Budget administered by the former South West Regional Development Agency. The Business Plan was partially succeeded by the first 10-year Strategic Plan, which set out the following:

- Strategic general policies for the project;
- Strategic development aims for recreating the railway;
- An overall development plan;
- Specific targets or objectives.

The aims and targets together made up a series of action programmes for the various sectors of the project, the more definite proposals spread over the first five-year phase, with more tentative proposals for the second five-year phase of the strategy.

The contents list of the 2018 document is reproduced in Appendix 2, for information.

The 2018 Strategic Plan's listed a number of overall strategic policies (which were, in turn, updated from its predecessor). These are considered in the next section of this document.

The previous Strategic Plan listed the following activities as being on-going at the time of its production:

Activity	Update as of 2024
Laying track on the third extension (600 yards) which will bring the running line to the edge of the infilled tunnel cutting just north of Chilcompton.	Completed.
Continuing the expansion of the signalling system to include the use of the double track section.	Completed.
Initial planning work on track layout and accommodation for covered stock on the "Somervale Depot".	Objectives have been amended, as discussed elsewhere in this document.
Development of a "Trust and Company" Framework document which reviews the roles and responsibilities of both the Trust and the Company.	Completed – see section 2.1.
Ongoing maintenance of station buildings and grounds.	Ongoing – and discussed elsewhere in this document.
Formal accreditation for the museum by the South West Museums.	Completed.
Continued training of volunteers and young people from local education establishments.	Ongoing and discussed elsewhere in this document.
Completion of restoration of Mark 1 BSK M34527.	Completed and now in service
Restoration of Milk Tanker 44000.	Completed and now in service
Progressing restoration of Wickham Trolley B40W.	Completed and now in service.
Transfer of BR Mark 1 coach SK M26049 into Trust ownership	Completed
Transfer of LMS Brake Van 294176 into Trust ownership followed by comprehensive restoration by Trust volunteer.	Completed and now in service
Introduction of safe operating procedures and systems.	Completed.
Establishing relationships with the local authorities and other public and private organisations.	Ongoing and discussed elsewhere in this document.
Development and implementation of maintenance for locomotives, carriage and wagons.	Completed

### 3.3 GRANTS

Over the years, the SDRHT has been very successful in attracting grants for specific projects, with support from the Radstock Regeneration Plan (RRP), Norton Radstock Town Council (NRTC), its successor Midsomer Norton Town Council (MNTC), the local Sperring Trust (ST) and, most substantially, from the National Lottery (NL).



The RRP provided funds to buy the first track, NRTC saved the stable block roof from collapse and enabled the NL £49,500 funding for the subsequent museum collection and Pill Box restoration; MNTC and ST have provided small but significant individual project grants over many years. These have totalled well over £100,000 during the Trust's existence.



## 4 WHERE ARE WE GOING?

The SDRHT’s overall strategic policies (reproduced from the earlier 2018 Strategic Plan) are that the SDRHT and Company will:

1. Restore sections of the former S&DJR main line to develop the existing operational heritage railway.
2. Restore and make accessible S&DJR heritage associated with the developing railway, including motive power and rolling stock, infrastructure, buildings and grounds.
3. Support local tourism by attracting visitors from all destinations, developing an S&DJR-themed group of attractions and visitor facilities, and combining with other attractions where appropriate.
4. Encourage community involvement through local volunteering, educational visits, skills training, and use of local contractors, services and suppliers wherever possible.
5. Encourage access for all, in so far as consistent with safe railway operations, security, environmental protection and management of the historic character of the railway.
6. Manage the railway corridor to conserve and enhance the built and natural environment.

The policies cited above have been reviewed in generating this document and are considered to remain valid with the following caveat: for items 2 and 3, whilst the underlying purpose of the SDRHT (and hence Company) remains principally associated with the S&DJR, it is recognised that there needs to be flexibility in how this is achieved in practice, in order to ensure the overall success of the project. This could include pursuing and/or supporting projects which are not purely S&DJR focussed where, in the Trustees’ collective view, these (a) support the overall purpose of the SDRHT and (b) do not detract from the S&DJR heritage aspects already preserved.

On the basis of this review, the SDRHT’s current objectives can be broken down into the following areas:

### 4.1 SHORT TERM (+ 12 MONTHS)

	What	Why	When (priority)
1.	Maximising the use of and value from the existing assets of the SDRHT.	This fits with at least 4 of the 6 strategic policies listed above (#3-#6) and also aligns with several of the outputs of the consultation workshop exercise (See Appendix 1). See section 5 for further detail.	See section 5.
2.	Completion of ongoing major railway projects to which it is already committed:		



	What	Why	When (priority)
a.	Somervale sidings	This supports or enables several of the strategic policies listed above (e.g #2, #4 and #6). Significant efforts and resources have been applied in reaching the current position (see summary in section 2.1). Both SDRHT and Company recognise the significant benefit to railway-related aspects (e.g. increased operational flexibility) and other aspects associated with the station site (e.g. enabling removal of some vehicles from the station site) which the sidings will provide, for a relatively modest outlay.	When planning approval is given. Urgent.





	What	Why	When (priority)
b.	Acquisition of 9F	<p>This fits with several of the strategic policies listed above, particularly #2. It has already shown its relevance to #4 in generating interest from new volunteers particularly those with engineering skills and is expected also to fit with #3. Both in itself and as a result of its potential as a marketing tool to raise the profile of what else is being progressed at MSN, the 9F is seen as a significant asset to the SDRHT. The basis on which the SDRHT is progressing the 9F acquisition is that, once item 3c below is fully in place, it will become a self-funding sub-project, which will not impact on the SDRHT's medium to long term capacity to progress other activities.</p>	<p>Timescales already defined in purchase agreement between SDRHT and the seller.</p>

	What	Why	When (priority)
c.	<p>Acquisition of Sentinel loco (from SDRHT member), or alternative steam locomotive in running order which is:</p> <ul style="list-style-type: none"> <li>• judged suitable for the SDRHT and Company's purposes, including the maintenance and storage facilities currently available; and</li> <li>• available for purchase; and</li> <li>• within the SDRHT's available funds (including those raised for the original purpose which remain available).</li> </ul>	<p>As with the previous item, this fits with strategic policies #2, #3 and #4. Both SDRHT and Company recognise that steam locomotive operation provides significant benefits both in generating visitor interest and hence, potentially, increased revenue income and volunteer interest. It is also recognised that the option of hiring steam locomotives to support this makes the revenue aspects difficult and hence presents risks financially and constraints with respect to conditions which may be attached to the hire agreement(s). N.B. The existing proposal to purchase the Sentinel locomotive is currently on hold pending resolution of both technical issues with the machine itself and negotiations between the SDRHT and the owner.</p>	<p>Conclusion of existing situation: urgent. If applicable, acquisition of alternative locomotive: moderate.</p>
3.	<p>Establishment of project teams and generation of project plans (including funding plans) for principal projects to be delivered over the medium term:</p>		



	What	Why	When (priority)
a.	Tunnel Lane developments;	<p>These developments fit with all 6 of the strategic policies listed above. The two key elements proposed:</p> <ul style="list-style-type: none"> <li>• a traction and rolling stock restoration and maintenance facility;</li> <li>• a passenger halt;</li> </ul> <p>are expected to transform the actual and potential scope of operations which are possible within the existing railway corridor (i.e. without extending operations beyond the existing section of S&amp;D mainline which has already been re-instated). Further details are provided in section 4.2.</p>	<p>Moderate. Other items listed in this table are more urgent but ensuring that the short-term objective listed (establishment of project team and generation of project plan) within the 12-month period is desirable, given the size of the opportunity they're expected to support, and envisaged to be realistic.</p>

	What	Why	When (priority)
b.	Staged extension(s) towards Chilcompton;	<p>Whilst the specific stages involved with any extension towards Chilcompton are yet to be defined, collectively they will inevitably fit with the first strategic policy listed above. It is also expected that, at some point, all of the other strategic policies will be relevant (e.g. as a result of the likely incorporation of a cycle route along the former railway alignment, alongside the reinstated railway which would be expected to relate to policies #3 and #5).</p> <p>With the major step recently taken by the SDRHT in the longer-term pursuit of this objective (i.e. the acquisition of the Redan Curve), this extension presents the most likely opportunity for developing the railway beyond its current limits of operation, notwithstanding the very significant obstacle which the intervening tunnel and in-filled cutting represent.</p>	Low. This should be progressed once items (a) and (c) either side have been completed since they have greater urgency and/or clearer routes to delivery.



	What	Why	When (priority)
c.	Restoration of 9F.	See item 2b above. Significant work has already been done to put in place the elements required in terms of engineering project management, for the completion of the restoration itself. The fund-raising to support requires consolidation and specific project leadership to take the sub-project forward and deliver it successfully.	High. To capitalise on the initial momentum generated and ensure that the principle behind the acquisition described in item 2b above is upheld, the full, formal, establishment of a fund-raising project team and generation of a fund-raising project plan is required.

	What	Why	When (priority)
4.	Rolling Stock acquisition and restoration	See next section for further detail for what might be covered by this item, which is expected to fit with the strategic policy #2 as a minimum and likely one or more of #3, #4 and #5. Plans in this respect to be determined at present. However, beyond the two key items discussed above (i.e. the Sentinel locomotive, or an alternative, plus the 9F), the planned acquisition of rolling stock for both historical significance and operational and/or maintenance related expedience is expected to remain a requirement and the pro-active planning of funding and, where required, project management of the type referred to under the various parts of item 3 above, to enable these activities to progress, will therefore be invaluable.	To be determined. The generation of the plan is expected to highlight priorities which are case-specific. The plan itself is, in a rolling stock context, the next priority after the items listed above (2b, 2c, 3b, and 3c).
5.	Land purchases of track bed between leased station area and filled in cutting	This fits with strategic policies #1 and #2 particularly. The underlying motivation is to bring as much as possible of the current running line into SDRHT ownership and hence reduce the risk that future viability of the project is jeopardised by leases expiring and landowners being un-willing to renew.	High - in order to protect the future operation of the railway and protect the investments which the SDRHT has made on areas beyond (to the south of) these leased land parcels.

	What	Why	When (priority)
6.	Opportunistic acquisitions and other investments to support longer term objectives – as listed in the following sections.	These may fit with any or all of the strategic policies listed above. The SDRHT recognises that some degree of flexibility in planning is going to be required to be able to respond effectively when strategically, or tactically, significant opportunities arise. These may require the re-allocation of resources and/or the re-prioritisation of the items listed above. Such considerations shall be made by the Trustees taking full account of the rationales discussed above, taking due account of risks and benefits presented both by pursuing the opportunity and by not pursuing it. This may include acquisition of track for future extensions such as in section 4.2, item 3a Chilcompton, and section 4.2, item 1ai for Tunnel Lane maintenance/restoration facility.	Ad-hoc

#### 4.2 MEDIUM TERM (+ 5 YEARS)

	What	Why	When (priority)
1.	Railway developments within existing corridor		
a.	Tunnel Lane	As discussed previously, under the corresponding entry in section 4.1, these developments are expected to be transformative and provide, between them, full alignment with the strategic policies listed.	High

	What	Why	When (priority)
i.	Maintenance /restoration facility	<p>Much consideration has been given to the construction of a purpose-built maintenance and restoration facility to replace the current arrangements based around the former goods shed at the station site which present a significant constraint, and very limited facilities compared to most similar organisations. As noted previously, the OPA included provision for such a facility on the Somervale site, which aligned with the expectations at the time the 2018 Strategic Plan was produced. Further investigations around these proposals concluded that this site was not suitable for this purpose. Hence the full planning application submitted with respect to Somervale is for sidings only. The Tunnel Lane site has been selected instead as the proposed location for this facility and land has subsequently been acquired for this purpose.</p>	<p>See related comments in relation to the next element of the Tunnel Lane development.</p>



	What	Why	When (priority)
ii.	Passenger halt	<p>Provision of some means of passengers boarding and alighting trains, in addition to the original station at MSN, opens up the possibility of offering a train journey rather than simply a train ride. Even without further development or expansion of the infrastructure, the opportunities for onward exploration via the footpaths which radiate from the area where the running line currently ends at its southern point, including to Chilcompton, provide a significant additional dimension to what the SDRHT and Company are currently able to offer. There are also commercial benefits with respect to taxation which are expected to increase revenue on ticket sales.</p> <p>Key considerations to be taken into account relate to the track gradient at this point (noting that the risks associated with this have now been assessed), accommodating the proposed adjacent maintenance / restoration facility, accommodating future extension towards Chilcompton, accommodating possible future development of the track layout (e.g. installation of a run-round loop), together with basic considerations on train lengths.</p>	<p>This is expected to be the simpler, cheaper and quicker development to complete (compared to the previous item). It has standalone benefits and serves a purpose regardless of when or, in extreme circumstances, if the maintenance /restoration facility is progressed. It is therefore the higher priority. N.B. Judgement will be required on costs and benefits /disadvantages of proceeding with this separately from the other related development (e.g. in a specific planning application) and ensuring the development of one does not impede the eventual development of the other.</p>
b.	Running line	<p>To build on the progress made under item 1 in section 4.1, in the reasonably foreseeable event that progress with at least some of these items will extend beyond the first 12 months.</p>	<p>As set out in the relevant part of section 5.1.</p>

	What	Why	When (priority)
c.	Station site	As previous item. Note: this could also extend to revisiting other items within the OPA, where these are not dependent on completion of item 1ai above (i.e. the maintenance/restoration facility on the Tunnel Lane facility.	As previous item.
2.	Railway and other developments outside the existing corridor:		
a.	Staged extension(s) towards Chilcompton e.g. on some or all of the "Redan curve" land acquired, including leisure path use alongside any railway reconstruction.	See item 3b in section 4.1	Moderate: as significant as the impact of any development of the Redan Curve land could be, this has to be seen as a lower priority than the Tunnel Lane developments described under item 1a above.
3.	Restoration of 9F to full working order (for heritage railway operation, i.e. not to main line condition).	See item 2b in section 4.1	Moderate: as significant as the potential benefits, directly and indirectly, which the 9F is expected to deliver, this also has to be seen as a lower priority than the Tunnel Lane developments described under item 1a above.
4.	Rolling stock acquisition and restoration:	See item 4 in section 4.1. Examples in some categories, where currently known, are included below.	See item 4 in section 4.1.
a.	Locomotives:		
i.	Historically significant	None identified at present.	N/A
ii.	For operational /maintenance purposes	None identified at present.	N/A
b.	Passenger carrying vehicles	None identified at present.	N/A

	What	Why	When (priority)
i.	Historically significant	None identified at present.	N/A
ii.	For operational /maintenance purposes	The BR Mk 1 SK currently being stored at the East Somerset Railway's facility at Cranmore and previously ear-marked for conversion to better provide wheelchair access to the trains operating would fall into this category. This clearly fits with strategic policy #5 particularly.	When a fund raiser is appointed who can explore funding opportunities.
	For operational /maintenance purposes	Additional BR Mark 1 braked vehicle (BSK/BCK/BSO or even BG) to provide greater operational robustness and additional capacity.	High
c.	Freight vehicles		
i.	Historically significant	Four Wheeled mineral wagons connected with coal mining industry of the Somerset mines.	Medium
ii.	For operational /maintenance purposes	None identified at present.	N/A
5.	Opportunistic acquisitions and other investments to support longer term objectives, as listed in the following section.	See item 5 in section 4.1.	Ad hoc.

### 4.3 LONG TERM (+ >5 YEARS)

#### 1. Extensions:

##### a. Towards Chilcompton (see note below).

- i. See earlier sections (4.1 and 4.2) on the scope, approach and rationale for extension towards Chilcompton. Given the scale of the challenges to be overcome before anything resembling the original railway alignment is made continuous between MSN and Chilcompton, it may be reasonably assumed that activities to achieve this will still be ongoing well beyond 5 years from the date of this plan (i.e. by 2029). Hence, it is logical to include this in this section too. It is also reasonable to assume, on the basis of information available at present, that this extension will remain a priority over anything which might be progressed in the other direction – see next item.

##### b. Towards Radstock.

- i. Between MSN and the site of the former Radstock station, most of the former railway alignment remains and much of this has now been converted to form part of the National Cycle Network. However, major obstacles to the



possible reinstatement of a railway exist in the form of missing under-bridges, including that immediately to the north of MSN station, over Silver Street, and the loss of Radstock station site itself. The 2018 Strategic Plan referred to a list of possible activities envisaged to begin to explore the possibility of extending towards Radstock and, at present, these are likely to remain the best outline of what might be required. Hence, the text from the previous Strategic Plan is reproduced here:

“To produce feasibility studies and detailed plans for extending the railway from Midsomer Norton towards Radstock, and identifying a new Radstock station site, this would include:

- seeking outside expertise to take on overview of the project and potential funding sources;
- seeking support from Bath & North East Somerset Council, plus Midsomer Norton and Radstock Town Councils, and Norton Radstock Regeneration Company;
- negotiating with the public owners of sections of the historic trackbed;
- commissioning a feasibility study on replacing three missing over-bridges (*sic*) (two major, one minor);
- accommodating the existing cycleway and any proposed extensions alongside the railway;
- working with the local planning authorities to identify any constraints, including environmental ones;
- exploring the potential for a physical link with the North Somerset Railway (or Somer Rail) project and thereby an outlet to the national rail network at Frome;
- Preparing an overall project plan.”

For the avoidance of doubt, extension towards Radstock is not a priority for the SDRHT at present and hence there are no associated preparatory works for any of the items listed above which are envisaged at present and included in this Plan. This position will be revisited during the annual review of this document and any update to that situation will be captured in a revision to the document.

2. Developments within existing corridor:

- a. As with the corresponding items in sections 4.1 and 4.2 these could relate to developments associated with the running line (e.g. further double-tracking and/or installation of run-round facilities in the vicinity of the proposed Tunnel Lane Halt), or further developments to the station site which could include revisiting some of the proposals included within the OPA. There are, at present, no specific proposals to document in this category for this planning horizon.



Note: previous Strategic Plans have referenced extensions beyond Chilcompton towards Shepton Mallet as an aspirational long-term objective of the SDRHT heading south from its current location. Whilst these aspirations remain, this Plan is based around the extension targets listed above and hence the SDRHT does not currently envisage making any investments or acquisitions beyond these targets. For completeness, the relevant section from the 2018 Strategic Plan is reproduced below. Those items which the SDRHT will continue to pursue, beyond Chilcompton, as far as possible, within the scope of this Plan, are highlighted in green font:

#### "5.5.1 Safeguarding opportunities for longer term railway extension

To take advance measures to secure opportunities for extension of the railway on land beyond that already used by the railway. This includes.

- Working with local authorities to present and secure support for an expansion strategy beyond 2028;
- Ensuring safeguarding of the historic trackbed to south and north of the current railway against obstructive development.
- Identifying current obstructions and exploring potential solutions;
- Getting early notification of development proposals that might hinder or block future extensions.
- Working with the relevant authorities, communities and developers to include provision for a railway corridor in any redevelopment or new-build schemes;
- Potential advance purchase of sections of the railway corridor, either reactively as opportunities arise or by pro-actively approaching private owners;
- Exploring opportunities to establish further bases for the railway away from the current operating sections (as has occurred on other heritage railways);
- Exploring potential links to other nearby railways."

## 5 HOW WILL WE GET THERE?

---

Using the same horizons referred to in the previous section, it's envisaged that achieving the SDRHT's objectives will involve the following activities:

### 5.1 SHORT TERM (+ 12 MONTHS)

1. Maximising the use of and value from the existing assets of the SDRHT.

This will be achieved via the following actions:

- a. Increase volunteer base. This is recognised as being the primary requirement, without which progress on any of the remaining objectives will be limited. It is therefore the priority.
  - i. Initially, this is to be progressed by recruiting an additional Trustee (which may be a co-opted non-voting additional Trustee position) with the specific remit of leading all volunteer-related aspects, including recruitment, retention, competence management, training and development. It's envisaged that this person will pursue initiatives such as those listed here:
    1. Formulate a plan to attract more volunteers, particularly the younger generation.
    2. Build relationships with local colleges/schools whereby students may gain skills/trades experience.
    3. Encourage volunteers to acquire CRB clearance and safe-guarding training etc, so that we can better facilitate young persons training on site.
    4. Consider setting up a youth branch, noting the example from the Swanage Railway.
    5. Establish a volunteer welcoming and mentoring team.
    6. Develop better system for dealing with enquiries, telephone calls/messages etc from potential volunteers.
    7. Look after volunteers to reduce loss of valuable specialist skills.
    8. Volunteer information board to provide regular updates.
    9. Staff training to raise awareness of need to meet requirements of the ORR, Health & Safety, legal obligations etc.
    10. Enhancing communication by regular updates through website and social media platforms to attract volunteers.
    11. Foster relationships with professional Institutes including Engineering and Railway Operations to attract young industry professionals.
  - b. Improve asset management regime. The over-riding intention is to move to a more consistently planned, pro-active, approach to asset management, across all of the assets owned and managed by the SDRHT. The expectation is that this will initially involve the confirmation of specific individual responsibilities for each of the asset areas to be managed and, through this, the identification of any gaps (i.e. where an



Asset Manager is not in place). Gaps will be addressed via additional volunteer recruitment, as summarised in the previous item. Once in place, each Asset Manager will be tasked with generation of an asset register and, for each item in this register, an Asset Management Plan covering the following areas (noting that not all areas will be applicable to all assets):

- i. Inspection
- ii. Maintenance
- iii. Renewal / Replacement
- iv. Restoration
- v. Disposal

The Asset Management Plans will include indications – which may well be estimates – of timescales, for example, time intervals between specific track maintenance activities, or between a building/part of a building requiring painting, or until restoration of a specific asset will be completed. The Asset Management Plans are expected to evolve and be amended based on experience but, nevertheless, are expected to inform annual budget requirements and, where necessary, any decisions by the Trustees on prioritisation.

- c. Strengthen governance of both SDRHT and Company. It is recognised that significant work has been done previously to establish strong governance arrangements for both the SDRHT and Company, plus the interface between them. Some of these are referenced earlier in this document (see section 2.3). However, an integral part of strong governance is continual review and improvement. Hence, to ensure that these arrangements continue to be best practice for an overall organisation of the type and size (and with the available resources) which this Strategic Plan relates to, the initial step proposed is to undertake an assessment of the combined organisation (SDRHT and Company) against the criteria set out in the ORR's RM<sup>3</sup> model (see earlier reference – noting there is a version of RM<sup>3</sup> specifically targeted at Heritage Rail organisations). This exercise will then inform next steps on what specific actions will be required, or beneficial, to provide the strengthened governance. These will be documented in a separate RM<sup>3</sup> Action Plan. The exercise will specifically consider the current list of principal named roles in each organisation and whether this remains valid, or whether there are omissions (e.g. a General Manager), or roles which are not required.
- d. Look for quick wins to improve station area:
  - i. Parking both on and off site
  - ii. Office and meeting spaces
  - iii. WC and restroom facilities
  - iv. Better segregation of restoration, storage and maintenance from operational / visitor areas.

Noting that most, or all, of these improvements should be addressed in the longer term through the more substantial developments which the SDRHT is planning (as discussed elsewhere in this Plan), the need for short term focus to address some of the more significant current shortcomings in the station area is recognised. The



initial proposal is that a sub-project group is set up, including a Trustee and relevant members of both SDRHT and Company (based on the organisation charts presented in section 2) to consider how best to approach these issues, on an interim basis, considering options available, costs, benefits, risks, dependencies and priorities, to develop a project plan for their resolution.

- e. Invest in facilities to support existing strengths in catering and retail. Initial proposal is that the Heads of Retail and Catering (see section 2.2) jointly prepare a funding proposal document setting out what's required in this area, options, costs, benefits, risks and dependencies and priorities.
- f. Local community outreach. Initial proposal is that this should become a specific role in the organisation chart for the SDRHT (current version provided in section 2.1). Once appointed, noting that this may well be dependent on the priority activities under item a in this list, this individual will then be tasked with producing a plan to build on the work which has been done to date and build stronger and more extensive links with all relevant parts of the local community. It may reasonably be expected that this will then support the activities proposed under item a in this list and therefore, potentially, all of the other planned activities.
- g. Strengthen brand and marketing activity. These are two separate but related matters. However, in both cases, the fundamental decision is on whether to rely on volunteer input to cover the required activities, or engage external professional (and hence paid) support. The initial proposal is to commission an external consultant, with expertise in both areas and experience in the sector in which the SDRHT and Company operate, to:
  - i. Brand: assess the significance of brand in the context of the current and planned activities of the SDRHT and Company and the markets, including paying customers, volunteers and other relevant parties (e.g. funding organisations), considering other comparable organisations in this context, assess the strength/weakness of the current brand, of each organisation individually and the collective – if different, and provide proposals for any changes – with a definition and rationale for the expected benefits which should be expected.
  - ii. Marketing:
    1. Review what the organisations currently do, could do (realistically) with the resources they have available and can reasonably expect to have available, and should do – taking into account the marketing activities which comparable organisations do.
    2. Provide a recommendation on the best approach which the organisations should take in future, including proposals for the optimum division of responsibilities between the SDRHT and Company and the extent to which they should engage paid support with the expected costs and benefits of doing so.







- Continued use of ring-fenced SDRHT funds (existing) in accordance with the agreed payment programme, to complete the acquisition from the current owner.
- See also item 3c below.
- c. Acquisition of Sentinel loco (from SDRHT member), or a suitable alternative. This will be achieved via the following actions:
  - Conclusion of discussions with the current owner to determine whether or not the SDRHT will purchase the Sentinel loco.
  - Next steps dependent on step 1 above, as discussed in section 4.
- 3. Establishment of project teams and generation of project plans for principal projects to be delivered over the medium term:
  - a. Tunnel Lane developments
  - b. Staged extension(s) towards Chilcompton.
  - c. Restoration of 9F.
    - In all 3 cases, the “how” is discussed in section 4.
- 4. Rolling stock acquisition / restoration.
  - How these will be pursued will be dependent on the content of the plan referred to in section 4.
- 5. Land purchases to consolidate SDRHT ownership of trackbed for existing running line.
  - Approaching the respective landowners to begin negotiations on possible purchase.
  - Fund-raising to support purchases where terms are agreed.
  - Consider fall-back option of negotiating more secure/longer term leases where purchases are not possible (i.e. the current landowners do not wish to sell).
- 6. Opportunistic acquisitions and other investments to support longer term objectives – as listed in the subsequent sections.
  - How these will be achieved will be case-specific but, in a general sense, this points to retention of some reserve of funds set aside to enable such opportunities to be pursued. The size of this fund will be determined by the Trustees taking into account the overall budget available and known discretionary and non-discretionary spending commitments.

## 5.2 MEDIUM TERM (+ 5 YEARS)

At this stage, the level of definition which can be provided on how these will be achieved is described in section 4.2.

## 5.3 LONG TERM (+ >5 YEARS)

At this stage, the level of definition which can be provided on how these will be achieved is described in section 4.3.



## 5.4 FINANCIAL STRATEGY

Over and above the comments which have been made in the previous sub-sections on the subject of financing the proposals described and particularly the action identified under item 1j in section 5.1 regarding fund-raising, the following key principles can be stated on the financial strategy underpinning this Strategic Plan.

N.B. These are carried forward essentially as per the previous 2018 Strategic Plan.

The financial strategy behind the Strategic Plan will cover:

- routine annual expenditure plus ongoing smaller-scale development and then
- the funding of major development schemes – such as the Tunnel Lane Developments.

The former is expected to be largely covered by existing revenue streams, including any minor grants. The latter will be treated as capital expenditure, requiring identification of major capital funding sources, e.g. through appeals and/or large grants. In this way, the project can ensure the viability of its core operation through expected revenue, while dealing separately with significant expansion schemes.

As previously, regular revenue streams are expected to be from the following, predominantly:

- Membership subscriptions and donations.
- Standing order donations.
- Visitor donations.
- Gift Aid claims, grants and other sources.
- Specific appeals
- Income generated by the Company, including via:
  - VAT reclaims.
  - Train ticket sales.
  - Special events.
  - Retail services
  - Catering.
  - School visits.
  - The station shop.

Previously, the SDRHT focussed primarily on reactive appeals for funding projects and other costs. It was identified in the 2018 Strategic Plan that a more predictable basis of financial planning needed to be achieved and the SDRHT will continue to focus on measures such as monthly contributions as well as seeking grant aid and matched funding to support this. Effort will also continue to be directed towards promoting legacies, as stated previously (section 5.1, item 1j).

Where significant funds have been received, the SDRHT will seek to use this in conjunction with grant and matched funding for projects, wherever possible.

Putting the Strategic Plan into practice will require clear annual action programmes of projects, tasks and activities and the requirement for these subsidiary plans has been identified in each of the previous sub-sections. It's recognised that the certainty over budgeted figures for revenue and



expenditure for each of these plans will decrease over longer timeframes (e.g. comparing year 5 with year 1).

As has already been commented, the overall organisation (SDRHT and Company in combination) is entirely dependent on voluntary labour for all functions. Some revenue spending tasks and some major capital spending tasks may have to be out-sourced for reasons of urgency, scale, need for professional assistance, etc. Where applicable, the associated costs of this out-sourcing will need to be factored into individual project plans.



## 6 HOW WILL WE KNOW HOW WE'RE DOING?

---

As a minimum, progress against the Strategic Plan will be reviewed as part of the Annual Review proposed. However, for the shorter-term objectives particularly, clearly this will be of little benefit. Hence, for the objectives and actions set out for the next 12 months, it is proposed that these will be reviewed at least quarterly. This review should be undertaken by the Trustees with input from those responsible for delivering each of the items, where these are not from the Trustees themselves.

In many cases, the actions defined point to the development of subsidiary plans covering specific focus areas and these plans will be expected to include their own progress monitoring mechanisms (e.g. defining key performance indicators) and those responsible for the implementation of each plan will then be expected to provide regular feedback to the SDRHT (and/or Company as applicable) on progress. Proposals for the frequency of this feedback should be included in each of the subsidiary plans.

It is also recognised that, aside from recording progress of activities, another indication of “how we’re doing” will be through the views of those individuals involved, and hence regularly seeking feedback, in the form of a volunteer survey, is proposed. This could be part of the Communications Plan referred to in section 5.1.

It’s recognised that both the SDRHT and Company are entirely volunteer-based and tasks undertaken by volunteers are not always easy to programme, depending on the availability of numbers at different times and the range of skills. The action programmes will therefore need some built-in flexibility.



## 7 HOW THIS PLAN WAS DEVELOPED.

---

Beyond the consideration of other documents, as referenced previously, including previous Strategic Plans, the principal input to the development of this Strategic Plan has been through consultation with the working volunteers. This took place in a structured workshop chaired by representatives of both the SDRHT and Company held on 18/5/24. Appendix 1 includes further details of the content of this workshop and its outputs.



## 8 APPENDICES

---

### 8.1 APPENDIX 1: INPUTS AND OUTPUTS FOR STRATEGIC PLAN CONSULTATION WORKSHOP: 18/5/2024





## 8.2 APPENDIX 2: TABLE OF CONTENTS FROM PREVIOUS STRATEGIC PLAN (2018-2028)

- 1 Introduction
  - 1.1 Purposes of Document
  - 1.2 Purposes of a New Strategic Plan
  - 1.3 Background to this Document
  - 1.4 Trust-Company Structure
  - 1.5 Scope
  - 1.6 Out of Scope
- 2 Background Information
  - 2.1 Outline History of the Project
  - 2.2 Summary of Achievements to Date
  - 2.3 Current Projects in Hand
- 3 Previous Planning Framework
  - 3.1 Plans and Actions from Previous Planning Framework
  - 3.2 Business Plans
    - 3.2.1 Strategic Policies
    - 3.2.2 Previous plans
    - 3.2.3 Budgetary Planning
    - 3.2.4 Policies
    - 3.2.5 Strategic Policy Framework
    - 3.2.6 Policy Approval
- 4 Finance
  - 4.1 Financial Strategy
  - 4.2 Assets and Liabilities
  - 4.3 Income and Expenditure
- 5 Strategic Plan for 2018 to 2028
  - 5.1 Financial Strategy
  - 5.2 Revenue Streams and One-Off Fundraising and Appeals





- 5.3 Short-Term Aims for Year 2018-19
  - 5.3.1 External Resources
  - 5.3.2 Completion of the Southern Extension
  - 5.3.3 Explore Longer-term siding capacity
  - 5.3.4 Complete plans for the Somervale Depot
  - 5.3.5 Explore possible improvements to the catering coach area
  - 5.3.6 Improvement of on-site and off-site transport management
  - 5.3.7 Retail and Shop area
  - 5.3.8 Refurbishment and redecoration of the station area and buildings
  - 5.3.9 Volunteer recruitment and training
  - 5.3.10 Develop links with local authorities and other public and private agencies
  - 5.3.11 Publicity and Marketing
  - 5.3.12 Transfer of day-to-day activities to the Company
  - 5.3.13 Themed Events
  - 5.3.14 Memorial Services
  - 5.3.15 Grants, Legacies and Donations
  - 5.3.16 Educational facilities
  - 5.3.17 Information Technology
- 5.4 Medium Term Aims for Years 2020 to 2023
  - 5.4.1 Somervale Maintenance Depot
  - 5.4.2 Passenger Operations to Chilcompton tunnel infill
  - 5.4.3 Additional Motive Power
  - 5.4.4 Facilities for families and younger visitors
  - 5.4.5 Refurbishment and maintenance of existing stock and carriages
- 5.5 Longer Term Aims for Years 2023 to 2028 and Beyond
  - 5.5.1 Safeguarding opportunities for longer term railway extension
    - 5.5.1 Southward extension of the railway
    - 5.5.2 Northward extension of the railway



- 6 Next Steps
- 7 Implementation and Monitoring