

ISLE OF WIGHT STEAM RAILWAY

**The Isle Of Wight Railway
Company Ltd**

Strategic Vision

6th June 2009

(Revised 2013)

ISLE OF WIGHT STEAM RAILWAY

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Appendix I

Section I – Introduction and Background

In May 2007, the board of the Isle of Wight Steam Railway (the Railway) created a Forward Planning Sub-Committee (FPC) whose brief was to consult widely with

volunteers, staff and members, seeking a broad consensus on the future direction of our organisation, and in so doing to determine and set out a long term vision and strategy plan for the Railway, against which it could set annual and periodic objectives and budgets.

After a number of drafts and much consultation, the Strategic Vision prepared by the sub-committee was adopted by the board in May 2009 and placed in the public domain a month later. It was acknowledged from the start that the document was never intended to be a one-off set of proposals frozen at the date of adoption and it was agreed that it should be reviewed every two years. This is the current version.

Continuing Consultation

The FPC will continue to consult, where appropriate, over changes and updates to the forward plan at its periodic reviews. Many of the policies and papers referred to in the original vision statement will continue to underpin revised versions of the vision document as they are published (see appendix I).

Setting the Framework

The first question the FPC asked was “What we are planning for?”

In attempting to answer that question, one is immediately subject to a host of differing views and opinions. For example, one starting point could be encapsulated in what might seem a perfectly reasonable mission statement such as *"The Isle of Wight Steam Railway seeks to recreate the pre-1966 atmosphere by running Island locomotives hauling Island carriages through Island stations"*

However, this statement makes an assumption that everyone wants to run a 'heritage' railway and re-create past eras; but it is clear that not everyone necessarily agrees that this is what we should do, and, even if we do want to do it, there are those who don't believe it is possible. So just defining and agreeing what we are here to do is contentious!

Therefore, throughout our deliberations, we have considered a number of issues:

- how to balance people's individual desires and (sometimes) single-mindedness with the views of others
- how to overcome resistance to change
- how to overcome resistance to something that may fall outside one's comfort zone
- how to satisfy very real concerns in some quarters about taking any risks, presumably (and understandably) to avoid financial problems or loss and/or damage to historical artefacts
- how to satisfy the varying needs and desires of our management, staff, and volunteers
- how to meet the needs of our customers and maximise the visitor experience

- how to expand our personnel and financial resources to ensure the Railway not only copes with the day-to-day issues, but is able to tackle the long-term desires

This document acknowledges that these issues exist and suggests the broad approach and some of the steps that need to be taken so they can be overcome, to avoid the Strategic Vision document being consigned to the 'nice idea but too difficult' pile and ignored. It continues to require determination and the continued full backing of the board and management team to ensure proposals are implemented.

From the consultations already undertaken, the FPC has taken into account the view of board members and managers that we have a duty to maintain and preserve what we already own, giving priority to developing our current operations, and not putting at risk all that has been achieved. The board will therefore only proceed with each element of the plan as it can be afforded, and each element will be benchmarked against how it impacts on other elements of our operation.

The Nature of This Strategic Vision Document

This Strategic Vision is not a 'business plan' in the traditional sense. It does not prioritise or list the order in which individual items or projects will or should be undertaken and similarly it does not set out detailed costings or look in detail at future funding sources.

It is a long-term strategy document, setting out policies, principles and proposals to guide our thinking and decision-making over the next 20 years (and beyond), and it states and provisionally allocates future land and property use to ensure we operate, develop and grow in a coherent and organized manner. In this sense the document is perhaps similar to a local authority 'Structure Plan'.

However, during our work on this document it has become clear that it would be helpful to give some guidance on which items need attention sooner than others and which projects can be undertaken more easily and quickly than others. Furthermore, early on it quickly became clear that it is pointless considering a detailed set of costly proposals if there is no regard to whether we will ever be able to afford it. Section 4 therefore, looks at how 'financing the vision' might be achieved and whilst it does not look in detail at future funding sources, it sets out the first steps required.

Overall, we believe the policies and proposals contained within this document are realistic and achievable over time.

Section 2 - Securing the Future

Over the past forty years, the Railway has benefited from a wide range of skills which are available from within its membership and volunteers - people who demonstrate a willingness to give substantial amounts of their time, expertise and, often, money to securing 'a little piece of the past'.

Through this considerable goodwill and input, we've achieved and secured much more than just a small piece of the Island's railway history. We've grown the operation, more than doubled the

length of the line, engaged full and part time staff, bought land and property and embarked upon an ambitious plan of restoring and recreating numerous items of rolling stock. The Railway as a business now turns over c. £1.5million per annum, employs 23 permanent and 8 seasonal staff and contributes significantly to the Island's economy. However, despite these best endeavours, the Railway continually faces significant challenges – membership numbers are relatively static, volunteers are not getting any younger, and on at least one occasion the Railway encountered significant financial difficulties. Most worryingly, in many areas, the organization has simply outgrown the facilities available. For example:

- The current engineering workshop was not designed as a place of employment and is inadequate for our current needs
- Despite the opening of the C&W workshop and the start of the HLF programme seven years ago, numerous items of valuable and historic rolling stock remain outdoors all year round. However, this issue should be substantially resolved with the opening of *Changing Trains* in 2014
- The company retains a host of historic artefacts which, with the current museum space, cannot be conserved, stored or displayed to their best advantage in an appropriate environment
- Despite a recent major refurbishment the shop remains limited by its location and space restrictions
- The building housing the company offices and educational facility is in poor condition and has long outstayed its temporary planning consent. A refurbishment was carried out in 2013 but a permanent solution is still required
- Aesthetically, the quality of visitor reception continues to require enhancement

To overcome these ongoing issues and to actively flourish, we must first recognize and accept certain realities which shape our business and our people resources.

We are an operational railway, with all the statutory and safety issues that presents ...

We sit firmly within the leisure industry ...

... But essentially we are a business.

To meet our objectives, survive and flourish we must balance the books. To develop and expand further we must maximize revenue, seek grant aid and additional sources of funding, and maximize the return.

The leisure industry today is very different from that of the 1960s, 70s, 80s and even the 1990s. To 'Travel as Grandad Did' is not enough. We acknowledge that we have to actively compete for the attention of the public against other places of interest: the beach, sport, cinema, online and home-based leisure activities and a myriad of other pastimes and activities available. Of course there are a number of people who will visit and support us because they love railways and steam; but our business must identify with, serve and please the customers, giving them a worthwhile and enjoyable experience. We must acknowledge and remember that for many people, the quality of our car park, refreshment facilities, shop and toilets is as important as the train ride!

In the same way that we compete for paying customers, we also have to compete for people to operate and continue maintaining our Railway. There are now many more options available to people, especially younger people, as to how to spend their leisure time. There are also many more health and safety, statutory and operational obligations placed upon us which can limit the ease with which we can interest and engage potential members and volunteers. In addition to encouraging new members and volunteers, we must continue to interest and engage our existing membership, staff and volunteer workforce.

Our primary focus must be to secure a successful future for our Railway and flowing from the issues raised above, there are seven key, but intertwined, areas on which our focus will always remain:

- Financial security
- Heritage - Meeting our preservation and heritage objectives, and fulfilling our objectives as an educational charity
- Customer Service - Maintaining excellent customer service to maximize our revenues
- Brand and Marketing - Identifying our 'brand' and exploiting it fully
- People and Organisation – Balancing the needs and aspirations of members, staff and volunteers, as well as developing a common sense of purpose and enjoyment throughout the staff and membership
- Land and Property - Securing our land and property needs and maximizing return from these assets
- Health and Safety – Ensuring that H&S legislation is used to allow work to be carried out safely, and not as a tool to prevent progress

We recognise that we have a duty to maintain and preserve what we already own, giving priority to developing our current operations and not putting all that has been achieved at risk. Therefore, in accordance with the seven principles above, we will always consider any new proposals against how it can be afforded, together with how it impacts on, or jeopardises, other elements of our operation.

In focusing on, and securing buy-in to these key areas at all times, we will ensure that the Railway continues to keep the history of the Isle of Wight railways alive.

Section 3 - The Strategic Vision - Key Proposals

This section sets out policies, principles and specific proposals to guide our thinking and decision-making over the next 20 years, to ensure we operate, develop and grow in a coherent and organized manner. In most cases it does not go into detailed planning. Furthermore, there are some areas which still require further input and, as indicated in S.I, the Plan suggests only broad timescales.

Setting the strategy to determine priorities, source funding and to make the final decisions on the order in which individual items or projects will or should be undertaken will be addressed

by the board. However, during the preparation of this document it has become clear that certain items need attention sooner than others and that some projects can be undertaken more easily and quickly than others. Therefore this section does, in places, highlight these areas.

Section 3.1 - Museum

Our whole railway is a museum. Our whole enterprise is a history of, and an interpretation of, Island railway history. Thus in defining what we actually mean by 'a museum', it is too narrow to simply think in terms of a room displaying exhibits, a series of interactive displays, or an archive of exhibits and documents.

Our museum status, together with our charitable educational status, is being given greater prominence throughout our operations.

The Railway as a Museum - Our overall objective is to provide open customer access wherever possible and to put on show as many of our artefacts, exhibits, heritage rolling stock and interpretive elements as practical. Therefore, our historic buildings and structures will be retained and maintained for public access wherever possible; our rolling stock will be restored and operated and/or displayed for public benefit and we will operate in a manner that recreates bygone eras from the mode of train operation to the style of our staff uniforms.

In the four years since this Strategic Vision was originally drafted the changes made by our enthusiastic museum team, together with the imminent opening of *Changing Trains* will greatly help the achievement of this goal.

We wish to develop an interpretive trail and, in this respect, there may be scope to create several 'sub-museums' in different locations around Havenstreet station. These might include a demonstration parcels/left luggage office, a lever-frame and signal post, wagons with demonstration vans being loaded/unloaded, a 'working' P Way hut and so on. The aim is to eventually develop a series of co-ordinated attractions in their own right which will enhance the visitor experience and provide an independent attraction when trains aren't running.

A Museum for Artefacts and Archives - Turning to the more traditional notion of a museum as an area for the retention, restoration and display of archives and artefacts, it is clear that, in the past, we did not give this area its due prominence and importance. For some years we had no museum curator and did not allocate anything other than a meagre budget to it. However, since 2008, a small but enthusiastic team has refurbished both the fabric of the museum and the quality of the displays. Our railway has a substantial archive of documents, artefacts and other items of historical importance, many of which have been willingly given (and willingly received) for our safe keeping and preservation. We therefore have a duty to continue the program of improvements now being carried out.

We acknowledge that we must retain and develop our museum as it is central to our core objectives. Some progress has also been made in disposing of non relevant items.

This strategy document commits to creating a proper museum and begins to specify how it will be housed and presented, how we will get there, and importantly states the principal personnel and approximate capital budget required for making it happen.

Section 3.2 - Brand Identity

Building on the work of our heritage sub-committee, we have created a more recognisable, clear and consistent image across the organisation.

This encompasses all parts of our organisation, from staff uniforms to the style of our stationery, from our external advertising to signage around our property; from the nature and colour of building materials we use to ensuring our rolling stock liveries are consistent and correct for given historical periods. We acknowledge that, in some cases, there are cost issues to maintaining the correct image, but the benefits and effects justify the added expenditure.

In the early days of our organisation the ideal was to distance ourselves from the BR era, so the post-war Southern Railway era became the obvious choice; it has also been suggested that it is our 'Isle-of-Wight-ness' that sets the tone.

What could never have been envisaged in those early days was that the Railway would grow to include four stations and would also have a variety of locomotives and rolling stock from the mainland and from different periods of Island railway history.

Our educational and museum role is assuming increasing importance as the years go on - It is a sobering thought that in twenty years' time there will not be many people alive who will be able to remember what a steam operated national railway network was like, when it featured as a part of everyday life. In many cases we will 'educate & inform' in an informal way, without the public being aware it has happened to them. The approach we take towards our broad image will be crucial to making this a success.

The work of the heritage sub-committee will continue to guide us in developing and maintaining our 'brand identity'. They are working towards some consistency in how we portray ourselves and have a genuine desire to offer something which is as accurate and authentic as possible, given the constraints within which we have to work in the 21st century. We acknowledge the view of the heritage sub-committee that we are first and foremost a heritage railway and should not be frightened to say so, and to restore and conserve accordingly.

Following the recommendations of the heritage sub-committee the individual stations will be portrayed to represent the following eras:

- Smallbrook Junction – British Railways (Southern). The welcome receipt of a LEADER grant in 2011 led to the construction of a simple station building at Smallbrook. It was decided to present this in the mid sixties 'end of steam' style
- Ashey – British Railways (Southern) – A minimal operation, now with interpretation of the history of the area including the chalk pit operation and the racecourse
- Wootton – IW Central Railway – To be portrayed as a typical country terminus. An ideal location for development of replica heritage facilities
- Havenstreet – Southern Railway – The Southern Railway building and platform should form our star exhibit and be retained/restored in Southern Railway condition, with existing public facilities transferred to new structures on other parts of the site.

(More detail on the individual stations is given in Section 3.5 below.)

However, we immediately face a problem. If we identify different historical periods for each station (as above) or for locomotives and rolling stock, can there be one consistent approach to uniforms, marketing materials and so on across the board? For example, a standard Southern Railway uniform would be out of place at an IW Central or a BR (Southern) station! Furthermore, we have given an undertaking that the two Hunslet 'Austerity' locomotives will remain in military livery. There is an opportunity to standardise entrances and information before entry to the site, but once inside, how do we establish the detail and ambience of the period we select?

We firmly acknowledge that we are in the 21st Century and that the strict heritage image to be portrayed in our core heritage areas and across our operations may need some adaptation for other areas and activities. Our business must identify with, serve and please the customers, giving them a worthwhile and enjoyable experience, with a broad approach to brand identity following through from stations to all other areas of our operation. Thus, we have a generic uniform style for all operating staff.

What is essential is that a set of 'brand' or 'image' rules exist to ensure there is a consistent approach, and that we implement the broad approach to our brand identity wherever possible. For example, while our catering must fulfil the 21st century health, safety and hygiene regulations, and provide menus popular with today's public, we can still present the building, the staff and the food with a strong 'nod' towards the Southern Railway or other heritage era.

In the four years since the Strategic Vision was published, progress has been made, particularly in re-branding the Refreshment Rooms and the Railway's publicity material and stationery, but we acknowledge this is only a start.

Section 3.3 - People and Organisation

Every member, volunteer and member of staff has his or her own views, aspirations and desires. We will always endeavour to respect every view and aspiration and try and accommodate them as widely as possible. In so doing we will enhance and maximize the potential input from our supporters, and probably broaden and enrich the scope of our operations.

Ours is a 21st century business with an early to mid 20th century face. We will take advantage of the latest business practices, training and systems to deliver all the background services needed in the most effective and efficient way possible, so keeping the maximum amount of income available for maintenance, restoration, special projects, and further development of the attraction.

The respective roles of the board and the management will always be clearly set-out. Clear communication is essential and the relationship between the two must be positive and united in taking the Railway forward in accordance with this Strategic Vision.

Our membership is the backbone to our structure and we would like to significantly increase our membership numbers to a level appropriate to support a first-rate steam railway.

We have around 1,500 members, but far fewer volunteers. We have fewer still paid staff. The more they can complement each other the better.

We are fortunate to have many retired personnel amongst our volunteers, several of whom took early retirement from their former careers and have been able to offer us significant amounts of time. However, we recognise that, in the current economic climate, early retirement may not be an option for many people in the future. Additionally the nationally recognised retirement age is likely to rise progressively. Both of these factors could impact on our future volunteer workforce.

We recognise that, if no action is taken, our workforce balance could change from the current structure of a small paid workforce supported by a large pool of volunteers, to a larger paid workforce running the Railway on a regular basis with reduced volunteer input in all areas.

Similarly, we recognise that, if no action is taken, in 20 years' time most of the core work undertaken by our staff will be the daily operation of the Railway, together with the ongoing care and maintenance of the collection and the infrastructure.

We know that many potential volunteers have an interest and skills to offer in various areas of our operation, restoration and maintenance requirements. Combining this with the fact we are running vintage stock and operating old equipment, we actively welcome all the help we can get to progress restoration and repairs as fast as possible. Wherever possible, individual projects, properly managed and planned, will be facilitated and encouraged.

We will therefore ensure our organization, particularly within the key departments, is capable of accommodating individuals who can devote their time and expertise to properly planned specific projects, and where possible ensure we provide sufficient space and materials to enable this to happen. This has the potential to gain us additional support, funds and skilled volunteer effort.

Taking the above into account we will, as a priority, develop people policies to encompass the following:

- The aspirations of our paid staff must be respected, and we will maintain a system to review and provide feedback to each individual. Our aim will be to assist the general manager to put in place the systems to grow, train, develop and reward our staff, in accordance with good HR and business practice. This should equally apply to volunteers. We will also act appropriately and in accordance with statutory requirements and best practice when an individual is not performing or a post is no longer needed
- Many of the skills required to operate our railway must be handed-on to future generations. Both locally and nationally, the pool of potential staff with general steam operating and steam engineering skills is rapidly decreasing. We will support initiatives to create apprenticeships to learn specialist trades such as boiler work
- We acknowledge that our paid staff have a responsibility to 'get the job done', so when working alongside the paid staff, volunteer input must be there to complement and assist. We will identify how to link volunteer labour with our full-time staff in every department, whilst recognising that in certain areas there may be difficulties due to the particular skills and levels of fitness required of the volunteers. However, we recognise that, ultimately, a strong and thriving volunteer sector can only benefit the drive to meet

the overall aims and objectives of the Railway. The challenge is to develop and train volunteers with the skills required to be able to positively assist our full-time staff

- We therefore wish to develop new initiatives to seek, recruit, train and support additional volunteers, to ensure we have a vibrant and active volunteer resource. To achieve this we aim to
 - search through the membership and identify skills that may be available from within the whole membership
 - set a strategy to interest and engage individuals who possess skills and experience we need, particularly those who can offer a range of skills to take on and complete whole projects
 - set a strategy for actively securing any skills not currently available from within the membership
 - wherever possible, match the skills of a volunteer to the needs of specific departments
 - encourage commitment, as well as instilling 'belief' and 'fun' into all our activities
 - develop a youth group to recruit, train and retain younger volunteers
 - encourage an active social side to enhance inter-personnel relationships and, for those that want it, to increase enjoyment of their pastime/employment
 - be pro-active in our communications with all volunteers, assisted by improved IT facilities
 - engender and encourage a vibrant 'academy' setup, which will provide future volunteers and will be linked to educational outreach work in local schools/colleges
- We will seek ways to ensure staff and volunteers can work flexibly enough to provide longer operating days during the peak season and, where necessary, during special events
- If a need to increase permanent staffing is identified, then any increase must be commensurate with overall growth of the business and meet sound business objectives
- We will aim to ensure we provide our general manager, managers, staff and volunteers, whether in an office, in the workshop or out on the track, with appropriate training and the best available 'tools of the trade' to do their jobs effectively
- We will set objectives to grow the membership and the support – both financial and practical – that they can give. In this respect we will consider setting a target number of members to reach and we will set a strategy to achieve this.

We do not underestimate that it will be very challenging to fulfil each of the above points.

The board of directors will provide overall support and direction to the general manager, his management team and to the whole organisation. Whenever possible, the board will include individual directors with specific areas of expertise and experience to lend guidance and support to each individual department. Thus, for example, we will always aim to include individuals with financial skills, engineering skills, sales and marketing experience, specific experience in museums, fundraising and so on.

Additionally, as a priority, we will seek individuals, probably volunteers, who can take on the challenge of fulfilling some of the above objectives.

Many of the events organised to celebrate the Railway's 40th Anniversary in 2011 helped rediscover the feelgood factor among the membership. We have also made progress in recruiting a number of professional people to help us with our future projects. However, further work is still required in the systematic recruitment of new and younger members and in seeking out new skills from the existing membership.

Section 3.4 - Running Trains

The Railway requires, and will continue to require, the assets and operational practices to provide a service capable of taking advantage of all available traffic and other profitable revenue-earning opportunities, large and small, across the year. To this end we will work towards the following objectives:

Locomotive and Rolling Stock Operations

- A core objective is to be able to operate longer hours, particularly during the peak season and during special events. We recognize the need to be alive to the commercial opportunities and to establish ways of timetabling longer operating days. We acknowledge that, when planning for this, we may require additional staffing well in advance to prepare for longer operating days and to ensure planned maintenance schedules are maintained (for example, if duty fitter's hours are spent on longer running, long-term maintenance and rebuilds may suffer, as more time is spent on routine maintenance)
- We further recognise the need to be able to respond to demand to supply trains for private charters, filming contracts and other commercial opportunities at short-notice
- A core objective is to be able to operate a two-train service throughout the peak summer months and at other peak times. We already have a full-time driver post, but we recognise that this may require an additional member of staff to cover one of the duty locomotives, plus full volunteer cover for the other duty locomotive
- A core objective for the long-term is to operate trains daily for the five-month period from May to September. However, currently we recognise the need to exercise care in determining which days to operate, to ensure it is financially worthwhile to operate on all the days selected
- A core objective is to have the facility to operate after dark. This will be of benefit commercially, as well as re-creating another aspect of former Island railway operations. In the longer term, provision is to be made for block working initially between Havenstreet and Wootton, and eventually throughout the entire length of the line

Permanent Way and Signal & Telegraph

- We will signal the railway as appropriate to our historical requirements; ensuring signals remain part of the 'railwayscape', with fully operational signal boxes at all stations except Ashley. However, subject to consultation with HMRI and other relevant statutory

bodies, we will develop a flexible signalling system, providing the capability of everything from full block post working (for example, for special events) to a minimalist operation (on our quietest days), and for operation of as much or as little of the operational railway as we choose to use on any given day

- Retention and maintenance of heritage equipment including lineside telegraph poles and wires, and S&T equipment within the signal boxes is considered essential to our heritage, museum and 'brand' objectives. We acknowledge the cost and resources issue here
- We will aim to achieve permanent way of a sufficiently high standard to minimise maintenance requirements and we will invest in plant resources to permit such ongoing maintenance
- We will ensure all permanent way structures, such as embankments, bridges and culverts, are maintained and upgraded as required to ensure safe operation of trains
- Overall, both areas need to be as simple as possible, minimizing staff requirements for operating trains. Both areas must, however, maintain the brand identity of the Railway, especially in all areas seen or likely to be seen by visitors

Locomotives

In terms of annual budgets and workforce the Mechanical Department is the largest by some margin. This focus has given us a mix of Island and other suitable locomotives which ensure steam availability on every operating day as, overall, we require a balanced fleet to meet operational and heritage needs

We have an obligation to preserve the history of Island locomotives and we owe it to future generations to ensure that genuine opportunities do not slip through our fingers. Such opportunities are rare

Our objectives are as follows:

- Short-term – Our central aim is to secure a core of operational locomotives capable of maintaining the required train service. To maintain the required schedule of seven-day washouts, plus allowing for routine maintenance and loco failures, at a minimum this requires three larger, more powerful locomotives with classification for running six bogie coaches or equivalent at 25mph (e.g. *Calbourne*, the Ivatt Class 2MT tanks or the Hunslet 'Austerities') and two smaller locomotives (e.g. *Invincible* or the 'Terriers')
- We will support all efforts to have our three Island locomotives in operational condition for use on our railway as often as possible
- Medium-term – The two Ivatt tank locomotives will join the two or more 'Austerities' as our main workhorses. Class E1 No.2 *Yarmouth* will be restored to operational condition. We wish to have one of the 'Terriers' fitted and operational for push-pull working
- Once eight locomotives in our current fleet are operational, we will be able to meet our train operating objectives, taking into account the requirements for 10-year overhauls, routine maintenance schedules, and allowing for loco failures

- Long-term – A long-term objective is to build a replica of one or more former Island locomotive to enhance our historical portrayal. We recognise that it is in this area that many potential volunteers have an interest and skills to offer
- Ongoing – Currently, most of our trains are hauled by locomotives with no Island pedigree. We therefore wish to develop a fleet which fit the brand, (i.e. former Island-based locos, representatives of former Island locos, or representatives of locos that might have come to the Island), and which are capable of handling all of the required train services. The acquisition of No.2 *Yarmouth* in 2012 was a major step forward and we still seek to acquire any other former Island locos, representative examples of former Island locos (such as the remaining two ex-Island ‘Terriers’ or Australian Beyer Peacocks) should they ever become available. We would then be prepared to dispatch (either through sale or lease) non-Island locomotives should they become surplus to requirements, to fund and accommodate this aim if necessary. However, any such disposals could take place only if the locomotive being acquired adequately replaces the operational resource of the disposed locomotive
- Individual projects, properly managed and planned, will continue to be encouraged and facilitated wherever possible
- It is our policy to retain and maintain a reliable diesel locomotive capable of ‘turn-key’ operation for operating passenger trains at short notice and for emergency cover
- Liveries – Recommendations will fall within the remit of the heritage sub-committee

Rolling Stock

- The need to maintain a serviceable fleet of carriages in a safe and respectable condition will always remain paramount
- This Strategic Vision supports the principles outlined in ‘20:20’(see appendix 1)
- Restoration and provision of suitable carriages as additions to our fleet remains a priority
- We will continue to actively support and encourage the completion of the projects within the HLF programme
- We are actively investing in underframe refurbishment
- Train sets must be capable of operating when required to secure all available traffic and other revenue-earning opportunities, large and small, across the year
- We are pleased to note that, with the entry of carriage 2403 into service, wheelchair facilities will normally be available on every train and we will ensure this continues to be the case. We will also aim to ensure there is adequate storage for buggies and push-chairs on all trains
- A core long-term objective is to have the facility to operate all passenger carrying vehicles after dark
- A long-term objective is to create ‘Formed’ sets of vehicles (with spares) to show different historical periods, with some capable of push-pull usage; and we will develop set formations which are flexible enough to allow high capacity sets to be easily formed

for use at peak times, or shorter, low capacity sets during off-peak times. We will not run unnecessarily large trains when demand does not warrant such trains

- We will continue to support the restoration of a heritage goods set (in addition to the existing restored engineers vehicles) capable of being used on a regular basis in timetabled use. We will target the remaining Island goods vehicles not in our ownership to complete this collection
- We will encourage the restoration and return to use of the former Ryde Pier Tram
- When the tube stock is taken out of service we will secure a representative example of the current Island line stock for static museum display. This may not be a complete vehicle, but could be a representative part of a vehicle imaginatively displayed
- We acknowledge that many potential volunteers have an interest, and skills to offer, in various aspects of rolling stock restoration and repair. Combining this with the fact we are running vintage stock on old underframes, we actively welcome volunteer support to progress carriage and wagon restoration and repairs as fast as possible
- Wherever possible, individual projects, properly managed, planned and resourced, will be facilitated and encouraged

Section 3.5 - Land and Property

Tying everything together is our land and property assets. We have worked hard over the years to secure the freehold of land and buildings, but have also relinquished some of these assets. In some cases it would be useful if we had retained ownership of these assets so wherever practicable we will always take a long-term view if considering disposal of land or property. Wherever possible, we wish to increase the level of customer access to our land, heritage areas and buildings to maximise the visitor experience.

Set out below are a number of proposals and objectives to maximize the use and convenience of our land and property assets.

I. Ownership and Purchases

Our general policy is to retain ownership of all existing land and property that we own. Subject to adequate resources we will seek to own a number of additional properties. As a registered charity and in line with good business practice, we will not pay excessively over the market values at the time of purchase.

The additional properties we would like to own at some stage in the future include:

- All three of the domestic properties fronting Station Approach at Havenstreet. This will secure the whole site into our ownership, and provide buildings for items such as further staff accommodation/facilities, social facilities, administration offices, education facilities, museum archive and reading room, a secondary 'Tea Room' adjacent to the entrance, or even offer revenue-earning potential through holiday lettings. Funding for these properties could be provided through commercial financing/mortgages secured on the properties themselves

- The stables and paddock fields adjoining the Barn Field. This will add to our land bank for car parking and to support special events and other activities
- Ashley station house and gardens. Ashley station building is the only original building on our line and the core of it is still largely in original condition. Securing Ashley station house will help us preserve another piece of Island railway history (see below)
- The four acre field to the north of Wootton station

Further to the above, to protect our interests and to allow for future expansion, our general policy will be to pro-actively consider acquiring additional land alongside our line, especially around our stations, if and when it becomes available. It is acknowledged, however, that all existing land, and any additional land acquired, requires maintenance and this will be a specific consideration with any further acquisitions. We will always aim to provide adequate resources for the maintenance of all land owned.

2. Havenstreet

Havenstreet is, and probably always will be, our main base. As funding and land re-use opportunities arise we will re-arrange use of land and buildings. The aim will be to create a mix of 'living museum' and essential commercial activities in the core station area, flanked by engineering, administrative and other commercial uses which will be located so as to impact as little as possible on the core heritage area. Most engineering and material handling facilities will be moved and located out of the public gaze. Our objective is to have little, if any, exterior stored project material. It will either have been restored and will be on show, or stored undercover.

Within the Havenstreet station site, we will present a number of larger indoor and outdoor interactive and useable displays. For example, a lever frame and associated signal post, a static loco and other items of static rolling stock which can be boarded and viewed. Other smaller static items will be displayed in a variety of buildings, such as the refreshment building, the station building, various new buildings and so on.

It is also our long-term objective to adapt, where practical, the existing sidings and works structures into areas accessible by the public, to allow full display and interpretation of our restored artefacts in as close proximity to the station as possible, while also retaining the running shed function. Additional covered areas and walkways could be constructed to provide a true all-weather attraction for the public.

Further development of the commercial, community and heritage events programme will require additional facilities, including new toilets of a modern standard, improved shelter for visitors during inclement weather, plus power, water and lighting to new parts of our site, good quality surfaced car/coach parks with lighting for night use, and increased storage for all areas of the business provided at point of use, rather than in any one central location.

Set out below are specific objectives for each part of the Havenstreet Site.

Car Park/Overflow Car Park – The lower section of our main car park will be fully tarmac surfaced. The main car park will have lighting provided. The roadways in the overflow car park will be properly completed.

It is a long-term aim to relocate the main vehicular access to a safer and more appropriate location.

The lower section of the overflow car park, between the Griffin's Sidings access road and the woodland, is to be reserved against any major building or development, as this area of land is potentially accessible by rail and may be required for future rail served facilities.

New Entrance Area – The entrance to the Railway is poor. It does not instantly 'engage' our customers and does not allow for maximizing commercial opportunities. We plan to construct a new entrance building at the north end of the car park closest to the station. The building will contain a booking hall, limited catering facilities, shop, delivery facilities, toilets, the Railway's main administrative offices and other commercial facilities such as a conference room.

This will provide a very visible entrance and booking hall with provision for customers to walk through the shop on their way out of the Railway. When the existing shop becomes part of our museum (see below) customers will be directed from the booking hall and shop, through the museum on their way into Havenstreet station. (We acknowledge that the planning consent for the C&W workshop expressly prohibits use of the yard access gate for public access, but public access from the rear of the new building and via the museum will form part of our overall planning application).

This new building will also allow the financial and commercial functions to be located immediately next to the primary location for welcoming visitors and cash collection.

Disabled parking will be provided to one side of the new building immediately off Station Approach. The access to the coal yard will remain and the alignment improved.

Station Drive and station yard – The drive must be retained to access the cottages and the station, but once the new entrance building has been constructed the existing ticket office could be removed or adapted to some other function. This area and the yard can be used to site interactive displays and items of interest. The original concrete permanent way hut in the north-east corner of the yard should be retained and converted for a permanent way display. The other hut should be removed and the area opened up for public circulation. Additional lighting, to allow evening operations, will be provided.

For the longer term our objective is to construct a public footbridge across the main road from the station yard to the Barn Field. It will run adjacent to the railway over-bridge from the point between the permanent way hut and the running line.

Barn and Field – The barn is currently being tidied-up, refurbished and improved, to provide storage for various departments. The field should be retained for supporting special events and, (subject to provision of suitable public access) could be used to hold events not currently suited to the Show Field (e.g. horse shows, the IV Ploughing Match, etc). Ballast loading and materials storage will re-locate to Griffin's Field. When adequate storage is available in Griffin's Field, the PMVs, wagons, carriage bodies and other engineering materials will be relocated there. The old ballast handling area may make an ideal site for a small period goods yard display as this field has potential for rail access and planning consent for this exists.

The Station Area - The Southern Railway building and platform form our star exhibit and will be retained/restored in Southern condition, with existing public facilities transferred to new

structures on other parts of the site. The former station garden may also be included in this area, to provide a 'sanctuary' that can be enjoyed by our visitors. The station building and the operational facilities within it will be presented as faithfully as possible in original period condition. We acknowledge that during inclement weather, the platform and crossing are quite windswept and exposed to the elements. However, in line with our desire to maintain the platform and station building in as near original condition as possible, we do not propose installing a shelter over the platform, but we wish to increase sheltered areas elsewhere on site.

Additional locomotive watering facilities at the western end of the site could allow for more flexible working and increased train lengths. Extra lighting, to allow evening operations, will be provided.

Engineering – Our aim is to locate most engineering functions within Griffin's Sidings field, keeping heavy engineering, repairs, major restorations, and all permanent way facilities away from the core station area. We acknowledge that the current engineering workshop is inadequate for current and future operating demands and, when designed, was not intended for such intensive use. The construction of a new larger mechanical workshop (alongside *Changing Trains*) has been identified as a requirement for Griffin's Field (see below) and we will invest in bringing the mechanical engineering facilities up to the standard required to meet our commercial and operating needs.

In the short term we are investing in improved ground surfaces around the engineering yard to enable safe use of these areas for working on locomotives and storing dismantled parts during overhauls.

Once a new workshop has been constructed, the current loco works will serve as a running shed, with scope to carry out routine servicing and maintenance, keeping operational facilities close to the station and a point of interest to visitors. The coaling stage and pen is considered adequate for current demands and again creates a point of interest alongside the running shed.

In the 'Goosefield' area the locomotive stores and engineering offices are inadequate. When the current loco works becomes the running shed, the existing machine shop could be converted to provide additional space for loco stores. Space for engineering offices has been identified on the mezzanine floor of the Carriage and Wagon Workshop. The 'portacabin' mess room is unsightly in such a prominent location and messing for operating crew could also transfer to the former machine shop. The permanent way office and tool store will move to replacement facilities in Griffin's Field.

In line with our charitable and educational aims, we will increase public access to these areas, including *Changing Trains*. It is a future intention to display items of interest and historic artefacts such as the former Ryde St. John's Road sheer-legs and wheel lathe.

The current C&W Workshop, which was constructed in 2004 with the benefit of an HLF grant, will remain as the Railway's principal workshop for carriage and wagon restoration, repair and maintenance. In line with the relocation of the engineering offices, it is proposed to create a new C&W mechanical shop. We acknowledge that, if the main engineering workshop is relocated to Griffin's Field, the C&W Workshop will be separate from other engineering functions. However, with its public access it is well located as one of the public facilities within Havenstreet station and as an enhancement to a new entrance building and expanded museum.

Griffin's Field – Griffin's Field already contains two sidings and road access has been provided. Completion of *Changing Trains* is imminent. Construction of new permanent way and mechanical engineering facilities are now the priorities here.

Detailed specifications for heavy engineering to meet our current and future needs are now under consideration and initial proposals are for a two-road building with substantial space for a boiler shop, machine shop, carriage inspection pit, an erecting shop, secure stores and messing facilities. Within and around the new building there must be space for loco dismantling and open storage of items awaiting repair.

The new mechanical engineering facility will have a public viewing area and sufficient space for any 'new' Island loco to be built and/or restored.

All heavy engineering and major restoration work will therefore be moved away from the core station area. Similarly, all engineering storage and all Permanent Way materials handling and storage will be located in Griffin's Field.

Our permanent way department manages a significant budget and has a substantial amount of equipment to maintain in order to discharge its responsibilities. A further building is required for offices, small workshop area, storage of vulnerable items, messing, lockers, washing and toilets.

Changing Trains will be completed in 2014 and will house the equivalent of sixteen bogie coaches undercover and four more under a side lean-to. The building will act as a display facility, allowing public access to the vehicles it houses. It will be wheelchair accessible and include a DDA compliant toilet. *Changing Trains* will form part of our museum facility, enabling the display of some of our larger exhibits. Public access will be via the rear of the existing 'Goosefield' area through the Carriage and Wagon Workshop. We see the structure as an ideal platform for a solar array.

We will bring the quality of trackwork on the north-western siding up to passenger carrying standards so that we can offer opportunities such as brake van rides and rides on the Ryde Pier Tram.

'Plessey Building' and its replacement – Although temporary refurbishments were carried out in 2013, the structure will ultimately need replacing. Ideally, in its place, there would be no more than an open vista into the Show Field, opening the view from the station and enhancing the feeling of a rural station. However, with our restricted availability of land we propose to replace it with a single-storey, multi-purpose education/exhibition/hospitality building which will be a single storey structure in two parts linked with a central covered concourse. It will locate on at least the footprint of the Plessey Building with the intention that it does not impinge upon, but enhances, the ever-growing need for space for special events.

Essentially it will comprise two separate buildings which can be constructed at different times, as funding allows. Each building will be open plan with sliding walls and patio doors opening onto the Show Field, providing total flexibility for exhibitions, conferences, hospitality, catering, AV presentations, covered exhibits and so on. The west building will include a catering store and will be linked to the Refreshment Building. The east building will provide additional toilets, a first aid post, and an operating office. Both buildings will be linked with a central canopy over a central concourse leading from the station area to the Show Field.

Volunteer Accommodation, Gas House, Museum and Shop – We will consider providing a canopy over the front of the Gas House and/or shop building, to provide some shelter for visitors during inclement weather.

When the new entrance building is complete the shop will vacate its current location and will move to the new building. The space vacated will be used to display museum artefacts and to provide our visitors with an introduction to the Railway.

In the longer-term, the museum may be re-located elsewhere (our challenge is to find a new location). At this stage the space vacated will be retained for public use.

Once the shop and museum have been relocated our aim will be to release the remainder of the first floor of the Gas House for further staff facilities. These could include a bar and social area, more sleeping accommodation, locker room and so on. In the long-term, we wish to see volunteer accommodation and social facilities located away from our core heritage and commercial area.

Visitor Toilets - The toilets located off the Refreshment Rooms are used only by visitors to this building and are not readily available when the Calbourne room is closed for private functions. The previous disabled toilet by the shop was of minimal help, but this facility has now been incorporated into the new volunteer accommodation building and its use has increased significantly. The main toilets in the station building are inadequate for modern needs. In the short-term, we have positioned a small temporary toilet and shower facility in the Show Field. A more permanent facility is under consideration either adjoining the sewerage works or to the rear of the station building.

Refreshment Rooms – The outdoor seating area (under the pergola) will be re-styled to fit our brand identity. In the long-term, providing sufficient space can be retained for the Children's Play Area, consideration will be given to extending the pergola to provide additional covered space for seating and for offering additional covered space for functions.

Children's Play Area

This will remain largely in its current location

Show Field – The maximum area possible will be reserved for special events of all kinds. Other than those items specified under 'Visitor Toilets' and 'Plessey Building and its Replacement' above, and possible small development in the south-east corner, there will be no building or major structural development in the Show Field (unless deemed essential for commercial purposes) until suitable additional land is available for special events. In that event, any future development in the Show Field will be restricted to provision of commercial and public facilities.

In the short-term, power, water supplies and land drainage will be provided around the field and the roadways extended. Once these are in place we can actively offer the field to other users to hire for their events. We acknowledge the need to reduce vehicle movements to and from the Show Field via the farm crossing, so the bottom access to the field off the main road will be made available for servicing and deliveries.

3. Wootton

Wootton will be maintained as a quiet rural terminus. It is an ideal location for development of replica heritage facilities and plans are now progressing to further develop the site in the style of an IWCR station of 100 years ago.

Track Layout - Subject to being able to maintain adequate visibility from Packsfield Crossing, the siding will be reinstated. This has the advantage of not only being available for the storage and display of restored rolling stock but also to provide greater operating flexibility when required on special operating days. The siding will be constructed by using SW chairs recovered from the main line, thus recreating a stretch of heritage track as recommended in the Heritage Policy Discussion Paper issued in 2006.

A new siding will be constructed off the existing loop, running adjacent to the fence line and including a short dock. The pointwork will be near the existing ground frame. The area will have public access and be displayed as a small goods yard. On special days the yard could provide shunting demonstrations. Consideration is also to be given to construction of a second platform, which would incorporate a stop block and dock.

Signalling – The signal box will be relocated to the platform and full signalling, in the style of the IWCR will be installed to allow block working when required between Havenstreet and Wootton.

Utilities - Full lighting, to allow evening operations, will be provided throughout the site. A suitable waiting facility for passengers, toilet facilities and a ticket office in the style of the original station building at Havenstreet has now been provided, as have interpretation boards.

Other - In designing the layout of the site, full consideration must be given to making as much of it as possible accessible to visitors. For example, this can be achieved by the sympathetic landscaping and fencing of areas, enabling photographers to capture currently unobtainable shots from new locations.

Joint Partnerships - We consider that there may be a case for a joint partnership with others; for example, a local caterer or a local heritage centre. This should be investigated further with the Parish Council and others.

Undertaking the Work - Developing the elements described above will constitute a long-term, ongoing and significant project which can act as a focus for significant volunteer input for many years to come. It is an ideal project for a volunteer team to take on as 'theirs', which we will actively encourage. We see such a team being volunteer-led and working under delegated authority, but working with, and drawing on the expertise of, our paid workforce, under the overall management and guidance of the Chief Civil Engineer.

4. Ashe

It is our policy to acquire Ashe station house and grounds, if and when it becomes available. Such acquisition would be with the assistance of a grant or commercial mortgage. Our intention is to restore the station as an authentic railway building, but gaining an income from it in part as a holiday let and in part as a period tea room/museum and garden. It is noted that Ashe station is located in an area popular with walkers.

Once acquired, a reinstated loop would add flexibility to our operations and a siding could allow displays of restored vehicles (although not for long-term storage), added interpretive facilities, or the provision of a camping coach. The long-term possibility of acquiring or leasing land to reopen the quarry branch is worth noting.

We are aware that, if required, it may be possible to provide a loop to the east of the current station.

For the foreseeable future (until the former station house can be acquired) the station will remain largely in its current state with small improvements as finances and manpower allows. Again, the care and improvement of Asheys is seen as an ideal project for a volunteer team to take on with the support and guidance of the Chief Civil Engineer. Simple lighting, to allow evening operations, will be provided.

5. Smallbrook Junction

It is not intended to develop Smallbrook into anything other than an interchange station with its current basic facilities. Lighting, to allow evening operations, should be provided.

Even if an extension to Ryde has taken place, the loop will be retained for additional flexibility in operating the railway (although this may not be required if the loop is replaced at Asheys).

We are aware of the major development proposal near Smallbrook and are monitoring developments closely.

6. Ryde St. John's Road

We are actively pursuing the opportunity to extend our operations into Ryde St. John's Road station and, if this becomes possible, will seek to maximise the commercial and other opportunities it may provide. We acknowledge that any such extension may radically alter our operations and may trigger a review of this document.

7. Newport

The policy to extend to Newport, if and when realistic, will remain, although we see no immediate prospect of this happening. We are aware that the former Whippingham station, which is another rare example of an IW Central Railway station building, still remains largely intact. We have no immediate plans to pursue or fund its acquisition, but nonetheless we would welcome it into our ownership as a long-term heritage asset should a Newport extension become feasible.

8. Island Line

In the unlikely event of Island Line closing we will consider the best way to minimize disruption to our own operations while maximizing on any heritage, PR and customer opportunities which may arise. We would not consider running it as a public transport undertaking but would actively pursue the prospect of operating parts of it as a heritage operation.

9. Property Maintenance

A property management team will be required to care for all of our land and property assets in the longer term, either working as a department in its own right or in tandem with another (for example, property/civils & P. Way now sit together with the estates function now part of the civil engineering department). The care and maintenance of our property is seen as ideal for substantial volunteer input, with volunteer teams taking on specific projects working with, and drawing on the expertise of, our paid workforce, and under the overall management and guidance of the Chief Civil Engineer.

Section 3.6 – Other Attractions

We will monitor any proposals for developments on land adjoining, or close to, our property and, where necessary, take appropriate action to achieve the best outcome for the Railway.

Section 3.7 – Commercial Outlets, Administration, Support and Other Functions

Our supporting commercial functions (shop and catering), administration, finance, marketing, IT systems and office support have grown organically with the business. These are all essential, not only to our day-to-day well-being, but to our survival in today's business and operating environment. We therefore recognise the need to properly invest in these areas to ensure that all parts of the organisation function effectively, and to ensure we maximise our revenues.

Shop

Although we intend to re-locate the shop to the proposed new entrance building, we have upgraded it to ensure it presents an attractive and rewarding shopping experience for our customers.

We will consider the possibility of providing basic retail facilities at Wootton.

Catering

We recognise that our catering must continue to offer products appealing to today's customers, and must keep abreast of changes in tastes and needs. Additionally, we will develop new offerings to attract new customers to the Railway.

We will consider the possibility of providing basic catering facilities at Wootton. Similarly, if Ashe station is purchased, use of some of the land will be considered for a Tearoom.

Marketing and PR

We recognise the importance of effectively presenting our Railway and events to the outside world to ensure we attract visitors and customers, and grow our visitor numbers. We will continue to invest appropriately in advertising, marketing and PR.

We are now a major partner of Visit Isle of Wight and at all times we will endeavour to maintain and strengthen our relationships with local and regional tourist bodies, transport operators, and other visitor attractions for our mutual benefit, and to ensure we continue to be one of the leading visitor attractions on the Isle of Wight.

Administration

We will ensure that our systems are sufficiently modern and comprehensive to fulfil our requirements.

IT systems

The Railway has recently invested heavily in new IT facilities. However, we will invest further in this area to ensure we have a fully integrated system serving all departments, and we will develop systems capable of better targeting and serving our customers.

Ticketing

We have invested in an electronic point of sale system and, notwithstanding our commitment to robust revenue protection, will endeavour to work with the provider to replicate Edmondson style ticketing as far as possible.

Our Magazine – Island Rail News

We will continue to invest in a high-quality members' magazine for the foreseeable future. However, we will aim to also publish this online in due course. We will monitor developments in electronic communication to take advantage of any appropriate new methods to reach our membership.

Website

We recognise this as an essential marketing, communication and sales tool.

Section 4 – Funding

Section 4.1 – ‘Financing the Vision’

In setting out these aims and objectives for the future, we recognise that developments of this nature cannot be funded purely from our own operating revenue. At present we have a business which generates a modest annual surplus which is enough for a slow drip-feed progression.

The sample estimated figures below reveal the sort of costs and therefore the levels of funding likely to be required for the capital projects outlined in this document, excluding possible extensions and new builds. It must be noted that these figures are unaudited, subject to detailed review and are for indicative purposes only.

EXPENDITURE

CAR PARK

Tarmac remainder of existing car park

£40,000

| | |
|---|-------------------|
| New entrance | £15,000 |
| Lighting | £15,000 |
| ENTRANCE BUILDING | £450,000 |
| RE-DEVELOP SHOP/MUSEUM SPACE IN GAS HOUSE | £30,000 |
| MISCELLANEOUS LAND & PROPERTY ACQUISITIONS | £500,000 |
| GRIFFIN'S FIELD | |
| Museum Building with toilets | £250,000 |
| ENGINEERING | |
| Mechanical Engineering Workshop | £800,000 |
| P-Way, Stores and Other Engineering Facilities | £200,000 |
| BARN FIELD FOOTBRIDGE | £100,000 |
| SHOW FIELD AREA | |
| Two single-story buildings linked by canopy (inc. toilet block) | £400,000 |
| Show Field improvements | £20,000 |
| OTHER STATIONS | |
| Ashey (purchase and restoration of building and station) | £400,000 |
| ADDITIONAL LABOUR/MATERIALS | £250,000 |
| MISCELLANEOUS/CONTIGENCY | £130,000 |
| Total Expenditure | £3,600,000 |

INCOME

| | | |
|---|--------------------|-------------------|
| Ashey station (Grant) | | £300,000 |
| Capital expenditure budget | 20 years @ £30,000 | £600,000 |
| Current Fundraising Streams | 20 years @ £35,000 | £700,000 |
| Mortgage on entrance building | | £300,000 |
| Legacies | 20 years @£50,000 | £1,000,000 |
| Other Grants, donations, sponsorships & fundraising initiatives | | £700,000 |
| Total Income | | £3,600,000 |

Notes & Assumptions

- Where possible, already published figures have been used, but all the above are estimates at this stage

- This Strategic Vision document must not be viewed as an ‘all or nothing’ exercise. Which projects are carried out and the timing of these will depend largely on funding. There could be individual projects or several undertaken together, forming a larger ‘package’

If we assume that ...

- these figures are somewhere near correct
- we manage to maintain current levels of fundraising and capital expenditure
- we secure substantial levels of grant aid, legacies and donations

... we could ‘finance the vision’ in 20 years!

A lot of assumptions!

If we are to fulfil this Vision, we need to be smarter with our use of assets (human, mechanical and property); continue to control costs closely and obtain best value in all our processes; create new ongoing income streams; and also not forget ‘how to be poor’.

Each is essential to the generation of more cash to fund the business. The order in which we put in place each piece of the income and expenditure jigsaw will dictate the order in which our developments can take place. We have already started down this road with new events and new selling outlets on the Havenstreet site. But much, much more is required.

Section 4.2 - Other Sources of Revenue

Special Events/Promotions – The existing programme of special events will be retained and refreshed as necessary. New events and customer promotions are being introduced with the aim of offering something different, new and special as often as possible through the operating season. Effective use of staff and volunteer input here will be crucial to ensure new volunteer input is found and staff time involved is not to the detriment of the overall operation. We have a Special Events Officer whose brief is to create new events to broaden our appeal and generate new revenue streams, together with building a team of volunteers to assist with developing and running special events.

Website and Online – The Railway introduced a much-improved website in 2010 which meant on-line payments were possible for the first time. However, further developments to include such facilities listed below are now being implemented.

- A positive and attractive ‘shop window’ for the world
- Clear and easy to follow customer information, including opening information, events, downloadable map, facilities, etc
- A prominent, easy-to-use and properly promoted online booking facility
- An online shop, prominently marketing items for purchase
- Downloadable offers and vouchers for special offers

- Interactive items to keep users on our site – e.g. games, surveys, competitions, forums, discussion board, occasional podcasts, film of the Railway, etc
- Facility for data capture
- Online advertising (e.g. from suppliers, other railway related businesses, other railways, Island businesses, etc)

Locomotive ‘Footplate Experiences’ – These have been offered in the past and could be re-introduced.

External Users and Corporate Business - Hire of our facilities for weddings, parties, conferences and training seminars, and hire of the Show Field for external fairs, shows and other events.

Filming Contracts and Photo Shoots – The Railway is already listed as a highly useable location on the dedicated website that lists film and TV locations on the Island. We will widen our marketing to different media and to location-finders, and ensure there is an ongoing drive to promote the Railway as a suitable location. The return to steam of *Calbourne* in 2010 led to a number of profitable photographic charters, something we intend to build on.

Hiring out of Locomotives – We are aware that locomotive hiring elsewhere has proved expensive for loco owners, so subject to a full assessment of our needs at the time, and providing it is financially worthwhile, short-term or even long-term locomotive hire could take place. The Ivatt tender locomotive is currently on loan to the East Somerset Railway as part of the EI acquisition.

Joint Ventures with Other Attractions – We will consider suitable joint ventures with other attractions.

Section 4.3 – Grants and Fundraising

Funds raised through sponsorship, business partnerships, grant-aid, legacies and donations will be the key to fulfilling most of the ideas in this Strategic Vision. Since this document was originally published in 2009, we have raised over £1,700,000 for different projects. However, we acknowledge that we can still develop our activities in this area, delving further into what is available for different activities and how we access it. We need additional people and skills to complement and enhance the current fundraising work.

Prioritising - This Strategic Vision is not viewed as an ‘all or nothing’ exercise. It is working in a logical manner to develop from what we have already achieved. Which projects are carried out and the timing of these will depend on our particular needs at the time and the available funding.

Whether we focus on individual projects or several to be undertaken together forming a larger ‘package’, flexibility is essential. At each stage we will also re-confirm that we are being realistic in our costings and timescales, and ensure we are not jeopardising or risking our achievements so far.

Section 4.4 – The Fund-raising Sub-committee

We have established a fund-raising sub-committee, whose initial brief was to consider the best way to proceed. Fundraising is critical to the implementation of this plan and to the continuing success of the Railway. The Group has been established by and will report to the board and its members will focus on securing funding from a wide variety of sources including:

- Grants
- Appeals and Donations
- Legacies
- Sponsorship and Business partnerships
- Specific fundraising events and activities
- In-house opportunities such as the annual draw, social events and on-site collections

It currently comprises the general manager, the Railway's special events co-ordinator, the company chairman and two other directors. Since 2009 it has been relatively successful, having completed raising the matching funding for 'Changing Trains' and partly raised the money for the Wootton Project. However, it is still seeking a principal mentor and benefactor who may be able to open and exploit business and corporate connections. He or she may also chair the Group.

Section 5 – The Story So Far and The Next Steps

Section 5.1 – The Story So Far

Since the publication of the original Strategic Vision in 2009 much has been achieved:

1. Phase I of the Wootton Project, including a new station building with modern facilities for our staff and visitors, has been built and extensions to the headshunt, loop and platform completed
2. *Calbourne* has returned to steam, to be joined shortly by *Newport* and the first of the Ivatt tanks
3. *Changing Trains* is in an advanced state of construction and will open in early 2014
4. Basic facilities have been provided at Smallbrook Junction
5. The E1 locomotive has been acquired for the Railway, thanks to a very generous bequest
6. Carriage 2403 has entered service, giving us wheelchair facilities on every train in normal circumstances
7. Two more goods wagons have been restored and a grant obtained for the restoration of a third
8. Restoration of the Ryde Pier Tram has started.

Section 5.2 Feedback and Support

In the preceding pages you will have been reminded how much our Railway has achieved over the past 40 years, together with how much it takes to keep us going today!

We've given a wide-ranging set of ideas and proposals for taking our Railway forward over the next 20 years, opening up exciting new opportunities for preserving, operating and expanding our piece of Island railway history.

So what are the next steps?

- We welcome your active participation in offering constructive comment and new ideas to contribute towards fulfilling this Strategic Vision. We will be pleased to hear from you ...
 - In writing ... Please write to The Chairman, c/o The Railway Station, Havenstreet, IW, PO33 4DS
 - By e-mail ... Please e-mail forwardplanning@iwsteamrailway.co.uk
 - Or if you would like to meet one of the Forward Planning team in person, please liaise with Peter Vail to arrange.

- We welcome contact from you if you are able to offer ...
 - assistance as part of our Fundraising team
 - your services as part of the special events team
 - experience in museums, fundraising, civil engineering, mechanical engineering, building construction or project management which could assist the board and management team

- We welcome active assistance from you as a working volunteer, helping to operate our Railway – whether you have just a day or so every now and then, or more spare time to offer, your Railway welcomes your participation!

We look forward to hearing from you ...

Appendix I

List of documents used in drawing up the Strategic Vision.

- The Railway Company's founding aims and objectives as set out in the Memorandum and Articles of Association
 - 20:20 Vision – A Carriage and Wagon policy document
 - Papers on locomotive policy (dated September 2001) and locomotive provision (dated November 2004) from the CME
 - Papers on the mechanical engineering department (dated May and June 2006)
 - The Heritage Policy, the Heritage Policy discussion paper and other supporting papers (dated September 2006)
 - A report into the mechanical engineering facilities (dated November 2007) from J G Peters
 - Papers on operating requirements (dated March and April 2008) from the Operating Manager
 - A paper on C&W provision (dated May 2008) from the CME
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The Isle of Wight Railway Co Ltd.
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