



# MID HANTS RAILWAY LONG TERM PLAN 2018 – 2022

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Mid Hants Railway Preservation Society  
Registered Charity: 284406

Mid Hants Railway Ltd  
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MHRPS = Mid-Hants Railway Preservation Society Limited

MHR = Mid-Hants Railway Limited

Railway = The whole enterprise encompassing all the activities of the MHRPS and MHR

# INTRODUCTION

## **Chairman's Foreword (Joint MHRPS & MHR)**

This document is the first issue of the Mid Hants Railway Future Strategy developed jointly by Mid Hants Railway Ltd and Mid Hants Railway Preservation Society. It supersedes the 2012-17 Five Year Plan and has been constructed having regard to the responses to an on-line consultation, feedback from staff, volunteers, members and shareholders.

The Boards regard it as key to have an ambitious overarching vision for the railway in the long term, which can provide the context for short and medium term planning. The Future Strategy will therefore inform the Boards' decision-making and prioritisation going forward.

The ability of the Boards to deliver this future strategy in its entirety is dependent on a large number of factors including:

- The ability of the Railway to attract more Customers whilst managing and controlling operating costs.
- The business climate over the next 10 years or more.
- Maintaining skilful and enthusiastic staff whether paid or volunteers.
- The success of the Railway in securing external funding, whether this is from grants, gifts, legacies or other sources of income.
- The ability of the Railway to let and manage external contracts.
- The ability of the Railway to gain permissions and waivers where required.
- Environmental and legislative considerations, which may change over time.

Both Boards recognise that the most significant factor upon which the completion of this strategy is dependent is likely to be cost. Therefore, while the strategic direction is clearly defined, the short and medium term plans are working documents and the priorities may change over time dependent upon circumstances and opportunities.

The Boards have set the bar high in their vision for the railway in 2030 and seek to engage our stakeholders in its delivery. We hope that you will want to embrace the possibilities and work with us to see it through!

John Trigg (MHR Ltd Chair) & Steve Crowther (MHRPS Chair)

## **Why do we need a strategy?**

We need a strategy to clearly articulate our purpose and use it to project and motivate activities around the Railway. This will give us a structured approach to challenges and opportunities in the future. This is especially important as we position ourselves to react to the changing expectations of visitors in the future.

Our strategy should support a consolidated plan, make the most of our resources and be easily communicated to everyone involved in the Railway.

## **Strategy Background**

This strategy builds on the previous 2012 – 2017 long term plan and has been influenced by the Marketing research and the associated strategy developed in 2017 as well as the 2017/18 Members & Volunteers survey. It is our first step in working towards our Vision for 2030 that has been shared through presentations across the Railway in 2018.

The nature of this strategy document is that it will be a living document that will be kept under review, being updated and reviewed as necessary. This document aims to recognise what has been achieved so far, describe considerations for developing a strategy and then lay out our strategic intent around 5 key themes; People, Visitor Experience, Infrastructure, Locomotives & Rolling Stock and Financing the Future.

## **Vision and Values**

As part of the strategic planning process the Boards of MHRPS and MHR jointly agreed a vision for 2030 and values to help guide and prioritise the planning process.

Our Vision for 2030 is to:

- Deliver a brilliant visitor experience
- Ensure our assets are protected
- Be known for engineering and operational excellence

Our values are:

- We provide an excellent visitor experience
- We uphold a safe and professional environment
- We develop the capacity to secure the future of the railway

## **MHRPS Aims and Objectives**

### **The Charity's Aims**

The aims of the MHRPS are to:

- Preserve, operate, and exhibit for public benefit, educational and instructional purposes.
- Stimulate and encourage all kinds of railway transportation systems, vehicles, and equipment.
- Foster and support railway preservation.

### **Who benefits from our activities?**

Our beneficiaries fall into four main groups:

- The general public.
- Schools, colleges and formal education establishments.
- Our members and volunteers.
- Railway enthusiasts and historians.

### **What do we do to achieve our aims?**

We will achieve our aims by supporting the MHR in doing the following:

- Operating the railway between Alresford and Alton.
- Providing interpretive displays.
- Promoting Open Days allowing the public to see behind the scenes of the Railway.
- Supporting and promoting visits by educational groups.

- Supporting training in the operation of the Railway and in the maintenance and restoration of its assets.
- Offering opportunities to our young people.

And by:

- Providing access to the MHRPS's archival and photographic collections.
- Providing information about MHRPS's activities online.

## **How is the Charity governed?**

MHRPS operates through a Board of Directors, who also act as Trustees for its charitable activities. The Trustees determine the general policy of the Society. Individual Trustees are also members of sub-groups within the Board through which detailed objectives and project planning are championed.

The Board meets approximately every two months or more often if circumstances require. Annual budgets are prepared and compared to actual results on a quarterly basis. Timely and effective administration of the day-to-day management of MHRPS is provided by the MHR.

## **Relationship and responsibilities of the MHRPS and MHR**

MHRPS is the majority shareholder of the operating company, MHR and as such, is in a position to influence the MHR on strategic matters.

The day to day running of the Railway is however the responsibility of the General Manager and his leadership team, governed by the MHR Board.

# KEY ACHIEVEMENTS SO FAR

## Pre-2012

The Railway started life in October 1865 as the Alton, Alresford & Winchester Railway and was intended to fill the gap between Alton and the main route from London to Southampton 2½ miles north of Winchester. The London and South Western Railway operated initial services and then British Railways after nationalisation in 1948. The line was closed in 1973.

Preservationists secured funds to buy the route between Alresford and Alton but track only remained on the section from Alresford to Ropley. The first train in preservation ran in 1977 and the railway was gradually reopened in stages, to Medstead in 1983 and Alton in 1985. This included significant restoration of original buildings at each station as well as additional infrastructure rescued from Uckfield, Lyme Regis, Ringwood, Netley, Tawton, Wilton, Cowes, Liss, Bentley and Aldershot.

The MHRPS successfully secured support from the Heritage Lottery Fund for projects to restore the Goods Shed at Alresford providing space for a shop, visitor information, meeting room and toilets. A further project focused on improvements at Ropley including extension of the existing works for a machine shop, staff facilities and dedicated boiler and carriage workshops.

The Railway was successful in acquiring locomotives of its own with the purchase of LMS Black 5 45379, BR Standard 4 75079, SR Merchant Navy 35005 “Canadian Pacific”, BR Standard 4 80150 as well as having a majority shareholding in SR West Country 34007 “Wadebridge”.

## 2012 to 2017

During the course of the last long term plan, the railway continued its reputation for completing locomotive overhauls to a high standard with the completion of SR Schools 925 “Cheltenham”, LMS Ivatt 41312 and BR Standard 4 76017. The MHR also purchased BR Standard 5 73096.

Thanks to support from Network Rail and generous donations and support we were able to relocate and refurbish the King’s Cross footbridge, a Grade 1 listed structure made famous by films including the “Elizabethan Express” and “Harry Potter and the Philosophers Stone”.

We were able to run a Heritage Lottery Fund sponsored Apprenticeship scheme “Mind the Gap”. This scheme enabled apprentices to work with experienced engineers, thus passing on practical knowledge to future generations.

Another Heritage Lottery Fund supported project that was successfully launched in 2015 was the Canadian Pacific Project. This is divided into two aspects:

1. The restoration of the Oliver Bulleid designed steam locomotive 35005 Canadian Pacific, together with the restoration of two wooden framed carriages designed by the same Southern Railways engineer.
2. Outreach and interpretation projects involving the local community, Job Centres, schools and higher education institutions. We are running a number of tours (at Ropley and Eastleigh), events and talks to increase people's knowledge of the locomotive, the Mid Hants Railway and the social history of steam and railways between 1940 and 1960. This includes creating links with communities and schools in London, where 35005 Canadian Pacific frequented during its service for Southern and British Railways.

The overhaul of Bulleid Coach 4211 was completed in 2015. This included rebuilding the wooden structure of the coach including an almost completely new brake end. The coach also provides wheelchair accessible accommodation.

Also in 2015, the new waiting shelter at Ropley was opened. This was an entirely new structure sympathetically designed and constructed to fit in with the Southern Railway's style of other buildings along the line. It is now an award winning building after winning the Railway Heritage Trust's 'Stagecoach Volunteer's Award'.

In 2017 both the 40<sup>th</sup> anniversary of the Railway and 50 years since the end of Southern Steam were celebrated. This was a spectacular occasion, with an interesting and exciting event held over two weekends. The opportunity was also taken to celebrate the contribution of volunteers with 40 years of service.

# STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

In order to support the planning process and agree our strategic priorities we have analysed what we believe are our strengths, weaknesses, opportunities and threats.

## Strengths

- Our product
- Friendly & enthusiastic people
- Growing reputation
- Major local attraction
- Volunteer input
- Level of experience in volunteers
- Working with other groups such as the Urie Locomotive Society, Eastleigh Railway Preservations Society & National Railway Museum
- Diverse and appropriate loco fleet

## Weaknesses

- Uncertainty of capital funding
- Shortage of appropriate skilled staff & volunteers
- Lack of covered accommodation for assets
- Rate of growth of visitor numbers
- Internal communication
- Age profile of members, volunteers and enthusiasts
- Management expertise in some departments
- Lack of covered work space for coach maintenance
- Quality of volunteer accommodation

## Opportunities

- Wider role in community
- Grant opportunities
- Involvement with other trusts
- Development of opportunities for young people
- Run more catering trains
- Enhanced educational facilities

- Relationships with benefactors & patrons
- Eastleigh outstation
- NRM links
- Geographical location/no local competition from nearby heritage railways
- Developing relationships between the MHR and MHRPS Boards

## **Threats**

- Uncertain economic situation
- Health and safety issues reducing operation and income
- Insufficient volunteers
- New legislation e.g. restrictive environmental policies
- Reduced passenger numbers
- Viability of the Railway
- Movement of staff/recruitment, retention issues
- Fuel costs, insurance premium costs
- Litigation affecting the Railway
- Lack of young volunteers
- Hostile takeovers
- Government intervention – compulsory purchase/reopen line

## **Heritage Railway Association “HRA” Challenges**

The HRA have identified a number of challenges that we have considered as part of our planning process.

- The number of railway enthusiasts is declining
- Revenues are under pressure
- Costs are increasing
- The age of those with railway operations and maintenance experience is increasing
- Assets are deteriorating in quality

# PEOPLE

For the purposes of our strategy the people theme encompasses staff, volunteers, members and shareholders.

## Effective Communication

The Communication Cord is our regular newsletter for people working on the railway. It is also available on the staff section of the website. In addition to information shared generally across our website and social media, there is a staff section of the website that is accessible to people in possession of an MHR ID card. Typically operational notices, bulletins and ad-hoc requests are shared on these staff pages.

We continue to run a communications group where representatives from any of the working groups/departments across the railway are invited to attend. The purpose of this group is to provide a structured face-to-face meeting for sharing information, recognising what is going well and identifying opportunities and actions for improvement.

The Mid Hants News is delivered three times a year to MHRPS members, a glossy A4 magazine featuring news, articles, reports and high quality photographs.

## Training and Development

We recognise the importance of developing the skills of our people, to enable this we will encourage and support:

- Apprenticeship opportunities
- Retention of key skills
- Department specific training
- Developing the young operators initiative

## Attracting the Right People in the Right Roles

We will continue to support and develop our Welcome Day process where potential new volunteers are invited to spend a day at the railway, hearing about departments from representatives and getting the opportunity to see some of the working environments. It is important that we are able to ensure we can get the people with the right capability into the vacancies that we have.

We need to ensure that the volunteering opportunities that we have, particularly vacancies, are well advertised making the most of the website and social media to do this. In order to do this successfully we need to continually be aware of the vacancies we have and the specific skills required.

Social engagements such as team events and the Christmas Party (traditionally held in January) are encouraged to give people the opportunity to socialise away from their typical MHR roles.

### **Recognition**

We will promote a culture of recognition, making sure that peoples efforts are recognised by the Boards, department leads and their peers.

Long service awards are presented to people who have 20 years service and this is celebrated as part of the Open Weekend.

### **Membership Recruitment**

We will develop a dedicated member recruitment team, to attend appropriate events to promote the railway and the benefits of supporting the MHRPS as a member.

### **Membership Benefits**

We regularly review the benefits offered to MHRPS members and are keen to explore alternative benefits, as part of this we will consider the most effective method of distributing the Mid Hants News.

### **Regional Groups**

Promotion of regional group activities is important to attract new attendees to meetings. Information and best practice from across the groups is shared to improve regional group attendance.

Attendance at shows and events local to the regional groups is supported to promote the Railway and MHRPS membership.

### **Members & Shareholders Open Days**

Our annual event offered with free entry to members and shareholders. This event includes “Behind the Scenes” opportunities and exhibitions. There is also the opportunity to meet Trustees and Directors.

# VISITOR EXPERIENCE

## Promoting and Growing our Offering

It is important that we develop the retail and catering opportunities that we provide our visitors and ensure these meet their changing needs and expectations.

We will continue to improve how we attract people to visit the railway and will make the most of marketing best practise.

The appearance of our customer facing areas, including rolling stock, has a significant impact on our visitors' experience. We will improve the appearance of these areas and provide a memorable, authentic and enjoyable environment for visitors.

We will continue to develop the innovative events and experiences that we provide.

## Education and Interpretation

Education and interpretation is a significant part of our offering. We have an excellent opportunity to inform people about our activities on the railway and foster a deeper understanding of heritage. We will support this with:

- Development of “Behind the Scenes” opportunities
- Archiving and exhibition of historic artefacts and displays
- Support for outreach and tailored experiences for charitable benefactors
- Telling our story online

## Running Trains

We aspire to run services that are suitable for a variety of target audiences and offer a mix of experiences for the families, enthusiasts and leisure trippers. Where possible we will run services that are complemented by links with local public transport.

We will do this with sympathetic operation that is representative of the British Railways Southern Region wherever possible.

In the future, we would like to develop the capability to run longer trains and will consider the approaches we may take to achieve this.

# INFRASTRUCTURE

## **Covered Accommodation for Rolling Stock**

We recognise the deterioration of our rolling stock is due to the lack of covered accommodation. This impacts on our visitor experience and increases the cost of overhauling or restoring out of service stock, as inevitably more work is required on vehicles that have been left out in the open.

To address this we are reviewing the opportunities available to provide covered accommodation. This includes exploration of offsite storage options. Wherever possible our preference when reviewing options is for our assets to be publicly accessible.

## **Alresford**

At Alresford, we aim to develop the retail and catering opportunities in line with our aspiration to improve visitor experience. We will also give consideration to weather proof spaces for museum exhibits. This will enhance what we can offer visitors and provide space for education and interpretation.

In order to run longer trains in the future we will consider the options for managing longer trains at Alresford.

## **Ropley**

In line with our aim at Alresford, we would like to develop the retail and catering opportunities available to our visitors at Ropley. We will also develop additional visitor attractions including the interactive signal box, miniature railway and review considerations for a nature trail.

We will also continue to develop the engineering facilities available making the most of industry best practice. The yard at Ropley will also be developed to provide a better environment for staff and visitors.

## **Medstead & Four Marks**

We will focus on preserving the typical country station ambience and provide additional interest for visitors with exhibition spaces.

Enhancing the impact of the moving goods by rail exhibition, we would like to develop the goods yard.

## **Alton**

The flow of visitors arriving at Alton has changed with the provision of the new footbridge. We will make improvements to the visitor entrance to ensure the best possible welcome and improve the flow of people around the station.

In order to run longer trains in the future we will consider the options for managing longer trains at Alton.

## **Car Parking**

Although not specifically mentioned for any of the stations, we are considering how additional car parking can be provided along the line that will meet our visitors current and future needs.

# LOCOMOTIVES AND ROLLING STOCK

## Locomotive and Rolling Stock Requirements

To meet the current and future operational needs of the organisation, there is a requirement to have:

- Five Steam Locomotives that are Class 4 and above and preferably six coupled.
- Three Main Line Diesels and three Diesel Shunters
- Three Service Sets including provision for the Real Ale Train
- Catering vehicles including provision for Dining Trains
- Additional spares plus Heritage Train (Bulleid Coaches)
- Heritage Goods Train

## Locomotive Overhauls

In order to sustainably meet these requirements, we are aspiring to have no more than two overhauls requiring significant input from Staff and Volunteers occurring simultaneously and will prioritise locomotives owned by the MHR/MHRPS.

We are aiming to:

- Complete 30506 as soon as possible
- Complete 35005 & 34105 by mid-2021 or sooner
- Overhaul 850 once 30506 is complete
- Prioritise 75079 and 73096 for completion after 35005 and 34105
- 30499 & 30828 to join when ready
- 34007 will be conserved in the short term with a view to exploring potential overhaul and operation options by a 3<sup>rd</sup> party, otherwise 34007 along with 45379 will be built into the plan after 73096 is in service
- Conserve 80150 & 34058

It is recognised that with the complexity of overhauling and restoring steam locomotives this approach will need to be flexible.

Where required we will hire in locos from 3<sup>rd</sup> parties to cover gaps, including Diesels

## Hampshire Unit

We would like to operate the DEMU as much as is practical, within our ability to maintain it.

## **Rolling Stock**

The appearance of our rolling stock impacts our visitor experience; in the short term we will improve their outward appearance by painting the coach roofs. We will also explore opportunities to increase the throughput of MKI overhauls.

We are completing the restoration of Bulleid coaches I456 & 4367 as part of the Canadian Pacific project and they will form the basis of an appropriate heritage coach set when paired with 4211.

In order to meet our charitable aims, the Railway should be able to operate a goods train with a variety of vehicles appropriate to the period we aim to portray. There is a rolling programme to restore goods, freight and departmental stock on the line and vehicles of significant heritage value may be acquired with a decision required on a case-by-case basis.

We will continue to seek opportunities to provide undercover storage for the vintage wooden coach bodies.

# FINANCING THE FUTURE

## Increasing Operating Revenue

We are planning to increase our operating revenue by increasing our passenger numbers. Once we have visitors on site we are working to attract more secondary spend through retail and catering.

We will also develop our premium offerings that provide an enhanced quality experience that we can charge for appropriately.

## Fundraising Approach

We are continually reviewing our fundraising approach and will prioritise requirements and targets against an annual plan. To support this we will develop a dedicated fundraising team.

## Membership

We will support the growth of membership to increase the funds available through subscription fees. We will also develop appeals that are suited to targeting members.

## Donations

In order to increase the amount of donations we receive, we will target potential donor groups with tailored campaigns. Linked to this we will organise fund-raising activities to seek donations at specific events.

We will also identify potential corporate sponsors and make appropriate approaches to develop mutually beneficial relationships.

## Legacies

We will continue to promote legacies and to support this we will explore partnerships with Will writing services.

## Grants

To make the most of grant opportunities we will identify and monitor organisations providing grants. Once opportunities are identified we will develop funding applications that are based around specific projects that meet grant requirements.

## HOW CAN YOU HELP?

There are a number of ways that you can help the Railway with achieving its strategy of working towards the Vision for 2030 such as volunteering, joining as a member and donating.

Visit <https://preservation.watercressline.co.uk/support> to find out more.