



STRATEGIC PLAN 2006-11

INTRODUCTION – Core objectives

The Swanage Railway is one entity, therefore the Trust, Company and subsidiaries will work in close harmony to deliver the agreed objectives as set out below; the subsidiaries carrying out their defined responsibilities to ensure legal compliance and maximise efficiency in use of financial and manpower resources in achieving these objectives.

The Swanage Railway Trust will take the lead in the following strategic objectives:

1. The extension of the Swanage Railway to enable the delivery of the planned community services
2. Creating the conditions to facilitate capital input for identified projects
3. Facilitating the acquisition and first phases of development of Furzebrook depot
4. Directing SRCL to return a net surplus each year, such surpluses as are not retained within the company to be covenanted to the Trust for improvement and development projects
5. Improving volunteer facilities.
6. Increasing its general fund-raising profile and seeking grant aid for selected projects.
7. Developing the Railway's Museums
8. The phased restoration of the Railway's fleet of heritage coaches and wagons.

The Swanage Railway Company will undertake the following strategic objectives:

1. Completion of the programme to overcome backlog maintenance issues.
2. Consolidation of the SRCL's existing activities.
3. Implementation of a maintenance regime for the fabric of its buildings and structures.
4. Review its activities to deliver surpluses as directed by the Trust.
5. To increase passenger numbers to 200,000 p.a.
6. To operate within the policies of the SRT.

All these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s. Supporting the achievement of these objectives, ways of improving methods of communication between various parts of the Railway will be developed as appropriate, the role of the General Manager in this is crucial.

The following five year plan relates mostly to activities of SRCL, Section 1 defining projects to be considered during the duration of this plan and Section 2 with a more detailed outline of activities for the coming year.

STRATEGIC TARGETS

FINANCIAL

- To reduce the reliance on an overdraft for the winter period.
- Source funds for capital and major project work.

MARKETING

- Continued development of promotions and profitable special events to maximise revenue during non-peak periods.
- Further development of the Park and Ride facility at Norden.
- Continue to review Disabled access to railway facilities.
- Investigation into the commercial possibilities of services to Furzebrook, Blue Pool and Worgret.

LOCOMOTIVE, CARRIAGE AND WAGON

- Development of Locomotive and Rolling Stock plans to ensure availability of appropriate vehicles for services.

INFRASTRUCTURE

- Survey of the infrastructure including identification of backlog issues and development of a plan to fund and undertake works to reduce or eliminate them.
- Provision of permanent facilities for the Infrastructure Departments
- Implement improvements to locomotive watering facilities and locations.
- Upgrading the line between Norden and Motala, including installing a level crossing at Norden.
- Planning for the works required subsequent to any transfer of responsibilities regarding the line to Furzebrook and Worgret Junction.

Civil Engineering and Permanent Way

- Progressive programme of upgrading of running line maintenance.
- Provide permanent bank stabilisation at Harmans Cross.
- Relaying of track and work to drainage in Swanage station throat to include realignment of the exit from the Platform Loop.
- Installation of a footbridge at Corfe Castle.

Signal & Telegraph and Telecom

- Maintenance of signalling installations for service requirements.
- Phase 2 of Swanage signalling and commissioning of Platform I at Swanage station.
- Review of SR communication needs.

Stations

- Continued restoration of Corfe Station to a condition representing the 1950's.
- Development of the Goods Yard at Corfe including the former coal siding area.
- Feasibility Study into the creation of a footpath to or halt to serve Woodyhyde campsite.
- Provision of better facilities for passengers on the Down Platform at Harmans Cross.
- Development and implementation of plans to allow Platform I to be commissioned.

STAFF AND FACILITIES

- Continue to develop the volunteer workforce by concentration on both recruitment and retention.
- Identify necessary improvements to facilities and develop a plan to implement these improvements.

FUNDING THE PLAN

Routine maintenance issues contained in the plan will be financed from revenue and funds for this purpose will be allocated through the annual spending plan and budget process. All projects that result in new or improved facilities (from their 2005 condition) will need to obtain a source of funding. Such sources include:

- SRCL reserves;
- Grants from SRT;
- Grants from external bodies.

Allocation of funding for projects will take place following the submission of a Project Form to the Board of Directors. This supports the process by which a project is managed and controlled.

In addition to funding the enhancements listed in this plan SRCL and SRT will work together to fund the overhaul and return to traffic of selected historic vehicles in the ownership of the SRT.

FURTHER DETAIL

The following documents will be developed to demonstrate plans for particular areas of the railway:

SRCL Marketing Plan – a plan of the services to be operated and the strategic and tactical marketing that these services will require.

SRCL Locomotive Plan – showing SRCL's requirements to operate the planned train service and overhaul plans on its own and other owners locomotives.

SRCL Carriage Plan – showing SRCL's requirements to operate the planned train service and overhaul plans for vehicles in its custody.

SRCL Wagon Plan – showing SRCL's requirements to operate the planned train service and overhaul plans for vehicles in its custody.

SRCL Infrastructure Plan – major projects currently planned during the period of this strategic plan.

SRT Heritage Coaches Project Plan – SRT plans for the funding and overhaul of Maunsell and Bulleid coaching stock.



MARKETING PLAN 2006-11: PART I

INTRODUCTION

The Swanage Railway's twin aims are:

- 'To create a heritage railway that recreates a Branch Line railway of the 1950s and '60s, operating a service in Purbeck for the benefit of the local community and visitors to the area'
- 'Working towards connecting the Swanage Railway to the National Network'

Part 1 of this plan outlines the plans for marketing those train services already operated by the Swanage Railway Company and how these and other services may be developed in the coming years. Part 2 of the plan outlines plans for the other commercial areas of the Railway: On Train Catering, Retail and Station Buffets.

In line with the Railway's Strategic Plan these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s.

As part of the Strategic Plan the Marketing Plan takes into account the following objectives:

MARKETING

- Continued development of promotions and profitable special events to maximise revenue during non-peak periods.
- Further development of the Park and Ride facility at Norden.
- Continue to review Disabled access to railway facilities.
- Investigation into the commercial possibilities of services to Furzebrook, Blue Pool and Worgret.

FUNDING THE PLAN

All marketing costs are treated as SRCL revenue costs and will be financed from revenue. Funds for this purpose will be allocated through the annual spending plan and budget process.

MARKETING THE RAILWAY

In promoting the Railway all marketing material should aim to complement these aims. As such the Railway's corporate style is intended to be sympathetic to its aim of recreating a Branch Line railway of the 1950s and '60s. Clearly the Swanage Railway's corporate image must also incorporate modern media formats. There is a clear 'Swanage Railway' logo for use on all material. This is supplemented by a 'Purbeck Line' logo which is associated with community based services. There are standard formats for General Posters, Handbills, Flyers and Leaflets.

A Style Guide is available from the General Manager. The aim of this style guide is to present a unified corporate image of the railway – both within and without. The introduction comes with a series of computer files (either on disk or by e-mail) as follows:

- Comp slip (Microsoft Word Document)
- GIL_____ (Microsoft Font File)
- Letter (Microsoft Word Document)
- Letter (SRT) (Microsoft Word Document)
- Letter internal (Microsoft Word Document)
- Memo (Microsoft Word Document)

This should provide a series of template documents for most purposes. The general idea is that all communications with outside bodies will be in the corporate green/cream colours whilst internal documents may be in the same style but using black and white.

THE RAILWAY'S TRAIN SERVICES, THEIR MARKETING AND DEVELOPMENT

Service	Product	Pricing	Promotion	Development
<p>Core service – Norden Park and Ride A majority of Train Operating income comes from Norden Station and is primarily from users of the Park and Ride facility. Such users fall into two categories: visitors to the Railway who use Norden for its convenience and 'casual' users using the Railway as a means of accessing Swanage and Corfe Castle. Many users of the Park and Ride facilities at Norden demand a relatively high frequency. Research on other schemes indicates that a 30 minute frequency is the optimum. Traffic from Norden features a strong morning and afternoon/evening peak.</p>	<p>The service offered uses a three level timetable, with the ability to upgrade from one level to the next without disrupting service patterns. The service provides trains at key times for the Park and Ride service from Norden. A 10 30 departure from Norden is provided in all timetables. On most operating days the last return service from Swanage is at 16 30. At peak periods this is extended at both the start and end of the day at peak periods.</p> <p>The frequency of service is increased with demand leading to the following basic service:</p> <ul style="list-style-type: none"> ■ 80mins at weekends from Mid February to end of December. ■ 80mins daily from Beginning of April to end of October and school holidays. ■ 40mins at weekends from Easter to mid October and daily during the peak summer period. 	<p>Most passengers are price conscious – the journey is often only a part of the day's experience. It is possible to charge fares at a higher level than a public service in recognition of the heritage aspects of the journey. For this reason steam traction is important for this market with the use of DMUs (providing good all round vision of the countryside) acceptable to most passengers alongside a steam service, but not in replacement for steam traction. At points of transition within the season the use of DMUs in this way can increase the frequency of service with little negative effect. However, the use of diesel-hauled trains of conventional coaching stock is not acceptable to most passengers in this market.</p>	<ul style="list-style-type: none"> ■ General leaflet, available from stations and distributed to other venues. ■ Website. ■ Adverts in tourist guides. ■ Association with promotion for special events. ■ Joint marketing with other attractions and businesses (Model Village, National Trust, Wilts and Dorset, South West Trains, etc.). 	<p>Future growth in this market is likely to be limited during peak periods as many trains run at the limit of capacity in at least one direction. There is room for growth in traffic that is against the peak flow and current efforts to tap this include further development of the existing links by boat from Poole Quay and Bournemouth Pier.</p> <p>Further development of general traffic can also be generated by developing closer links with other attractions with the aim of becoming the preferred means of arrival at these destinations. Growth in this area will be incremental but possible with little additional outlay in terms of promotion. This will be particularly effective if linked with the development of coach visits during the less busy period of the season. Examples of existing developments of this nature are The National Trust at Corfe Castle, Corfe Castle Model Village and Durlston Castle.</p>
<p>Core service – Swanage to Corfe Castle The second greatest source of income is traffic from Swanage to Corfe Castle where most passengers visit the village and attractions. These users share many characteristics with those from Norden but is more evenly spread through the day.</p>	<p>Party travel is an important part of this market and is an area that is under development. Discounted fares are offered for groups larger than 10 persons with various offers to promote travel outside the peak season. Joint offers exist for non-travel options both within and without the railway (e.g. Cream Teas, Corfe Castle Model Village)</p>	<p>Varying levels of discounts are offered:</p> <ul style="list-style-type: none"> ■ Flat rate discount for ad hoc parties. ■ Increased discount for advance booked and coach parties. ■ Further discount for specified periods off peak. 	<ul style="list-style-type: none"> ■ Website. ■ Leaflet distribution to coach and tour operators and other selected sectors. 	<p>A specialist package for school parties including educational package is being developed to enhance the Railway's product to these groups. Continued promotion to coach operators is also planned. The party travel system will also be included in plans for corporate sponsorship being developed together with the SRT.</p>
<p>Residents and temporary residents At various times the core services also carry passengers who are resident in the area. This is an important long-term market of the aim of building up business for the eventual running of through services is to be successful. At the present time the only trains that are run specifically for this market are the evening services that have run for at least the last ten</p>	<p>Where separate services are operated for this sector they run using lower cost traction options. Many services are provided by DMUs with good all round vision and, as such, are marketed as a way of viewing the Purbeck countryside. There is a standard evening timetable which operates on selected dates through the summer</p>	<p>Price is highly sensitive with trains competing with buses or the private car in many cases. This problem has been approached in different ways over the years and the long standing season tickets for campers were supplemented by the Purbeck Starcard (since renamed the Purbeck Residents Railcard) to cater for the needs of both temporary and</p>	<ul style="list-style-type: none"> ■ General leaflet, available from stations and distributed to other venues. ■ Website. ■ Flyer. ■ Adverts in tourist guides. ■ Posters at 	<p>Continued promotion of the Residents Railcard will take place. This card aims to increase the amount of repeat travel by local residents, together with the possibility that they will bring accompanying passengers at full rate.</p> <p>Sale of day return and season tickets by campsites as an extension of the agency status of some TiCs. Such passengers tend to use</p>

<p>years and the early morning service that was introduced experimentally in 2005. Trains run specifically for this market are often operated using diesel traction (either DMU or loco-hauled) and this seems to have little effect on passenger perception.</p>	<p>season, normally:</p> <ul style="list-style-type: none"> ■ <i>Fridays and Saturdays from Easter to the end of September</i> ■ <i>Daily from mid July to mid September</i> <p>Increased ridership is encouraged by the provision of catering options on some evenings.</p>	<p>permanent residents.</p> <p>On those services that are run specifically for this market a lower price 'discount' fare is provided. This fare is set with regard to the costs of equivalent forms of transport including taxis.</p>	<p>campsites.</p>	<p>trains outside the daily peaks if using the railway as a true means of transport. This also aims to try and ensure that revenue loss is minimised at stations with no regular booking offices, and in particular to tackle the problem of revenue collection from passengers joining the trains at Herston.</p> <p>Further ideas for promoting the evening services – such as Music Evenings need exploration.</p>
<p>Driver Experience</p> <p>Driver Experience packages are a good revenue centre on days when public services do not require all line or rolling stock capacity. They could also provide the opportunity to recruit staff for both footplate and other duties on the Railway.</p>	<p>The Railway currently provides a single option lasting about 1 ½ hours where participants drive in one direction and fire in the other. Each participant is provided with a gift pack at the end of the experience.</p>	<p>A premium price is charged based on the unusual nature of the product. The pricing structure will need revision if the development plans are carried out to provide a clear and logical structure to the prices of different options.</p>	<ul style="list-style-type: none"> ■ General leaflet ■ Website ■ Flyer ■ Posters 	<p>Following trials during early 2006 it is planned to introduce a more advanced Driver Experience option lasting all day. This would provide the opportunity to provide some classroom tuition before each participant is instructed on both firing and driving during a number of short trips from Corfe Castle. This enhanced option would be priced at a higher level to reflect the greater individual input. Alongside this it is planned to offer Diesel Driving Experiences on a variety of traction.</p>
<p>Special Events</p> <p>Special Events are not viable additional profit earners in the main season from May to September. There is, however, the opportunity to use a programme of special events to increase revenue at times when the railway is otherwise not so busy.</p> <p>Generally both Special Event features and the train services should make a greater profit than normal. In certain situations one area may be a loss leader as long as the additional profit in the other area more than compensates for this.</p> <p>Individual events approach different groups of passenger with the positive effect of broadening the range of people who experience the railway.</p>	<p>Long standing events are:</p> <ul style="list-style-type: none"> ■ Days Out with Thomas events that take place in February and October ■ Steam Gala takes place in September. ■ Santa Special services in the weeks preceding Christmas. <p>Recent additions to this programme have included:</p> <ul style="list-style-type: none"> ■ Branch Line weekend at the start of the season. ■ Trial of a Rail Ale Festival in May. ■ Expanding the Diesel Day into a two-day event in November. 	<p>Pricing of special events presents a problem with the competing demands of core service users who wish to make one journey and the railway's desire to charge those attending the special event a premium. This has been tackled in two ways:</p> <ul style="list-style-type: none"> ■ Providing certain trains at normal fares and others (distinctive in nature) with special event fares. ■ Selling both ordinary and special event fares but having some special event features open only to special event ticket holders. <p>These strategies are used, either singly or together, to provide the best perceived solution for a particular event. This has the additional advantage of always providing a service that can be used by PLM and privilege holders.</p>	<ul style="list-style-type: none"> ■ General leaflet ■ Website ■ Posters ■ Advertising in newspapers and magazines 	<p>The continued development of a programme of special events will take place. The aim of this will be to increase revenue during periods of the year when spare capacity exists. All special events will aim to produce an operating profit. The preferred model for special events is that of a separate group (either within or outside SRCL/SRT) to organise special features with SRCL providing an appropriate train service and price/promotion structure. An existing example of this is the Steam Gala and associated Vintage Vehicle Rally.</p>

PROMOTIONAL PLAN

	General leaflet	Website	Posters	Flyer/leaflet	News Release	Tourist guides	Newspaper advertising	Railway magazine	Promotion through	Mailing to operators	Radio
Core Service – Norden Park and Ride	*	*	*			*			*		
Core Service – Swanage to Corfe	*	*	*			*			*		
Core Service – Party travel	*	*	*			*			*	*	
Residents and temp. residents	*	*	*	*							
Driver Experience	*	*	*	*							
Thomas events	*	*	*	*	*		*				*
Branch Line	*	*	*	*	*		*	*			
Easter	*	*	*	*	*		*	*			
Rail Ale	*	*	*	*	*		*	*			
Fireworks	*	*	*		*		*				
Steam Gala	*	*	*	*	*		*	*			*
1960s Weekend	*	*	*	*	*		*	*			
Santa	*	*	*	*	*		*				*

General leaflet – 300,000 copies produced for distribution at stations and to other venues by volunteers, Publicity Unit and contractor.

DISABLED ACCESS

The Railway has, for many years, welcomed disabled travellers and has level access to all platforms and the ability to convey wheelchairs on all service trains. As work programmes allow the following should be considered to enhance the visitor experience:

- Creating enhanced areas on trains for wheelchair bound passengers;
- Resurfacing paths with hard-wearing and smooth surfaces; and
- Installing amplification at selected Booking Office windows.

Provision of facilities for disabled passengers of all types should be regularly reviewed by staff in the light of experience so that, where possible, other weaknesses can be identified and tackled.

SERVICES BEYOND NORDEN

This plan only deals with services that are operated by SRCL and therefore the marketing strategy for services to Wareham is not covered. It is, however, possible that, in the future, SRCL will be able to run services for a point beyond Norden. At present there is no suitable location where such services could terminate – due to the prevailing gradients on SRCL controlled infrastructure on the approach to Motala.

However, if any of the currently Network Rail controlled infrastructure were transferred to SRCL control allowing a terminating point to be created then such a service should be considered. Such a service would have to fulfil the following criteria:

- *Not affect the core Norden – Swanage and Swanage – Corfe services.*
- *Provide additional revenue on selected operating days.*

When more certain details of any changes to infrastructure control are known detailed plans for such a service will be drawn up. At this stage base specification for planning this service would be:

- *DMU operated service, extending existing DMU journeys beyond Norden in the Green timetable and operating a Corfe – Norden – Terminus service in the Gold timetable.*
- *Steam operated services for special events.*
- *Joint promotion with Blue Pool, in line with general policy of working with other local attractions.*



LOCOMOTIVE PLAN 2006-11

INTRODUCTION

This plan outlines the plans for maintaining the existing locomotive fleet used by the Swanage Railway Company and how commercial and other needs may shape this in the coming years.

In line with the Railway's Strategic Plan these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s.

As part of the Strategic Plan the Locomotive Plan takes into account the following objectives:

LOCOMOTIVE, CARRIAGE AND WAGON

- Development of Locomotive and Rolling Stock plans to ensure availability of appropriate vehicles for services.

STAFF AND FACILITIES

- Continue to develop the volunteer workforce by concentration on both recruitment and retention.

FUNDING THE PLAN

Routine maintenance issues contained in the plan will be financed from revenue and funds for this purpose will be allocated through the annual spending plan and budget process. All projects that result in new or improved facilities (from their 2005 condition) will need to obtain a source of funding. Such sources include:

- SRCL reserves;
- Grants from SRT;
- Grants from external bodies.

Allocation of funding for projects will take place following the submission of a Project Form to the Board of Directors. This supports the process by which a project is managed and controlled.

HERITAGE CONSIDERATIONS

Locomotives of classes that would have worked on the former LSW territory are most appropriate to the Railway and in particular locomotives of classes that once worked the Swanage branch have particular significance. Of those locomotives that once worked the branch members of the following classes survive (either in operational or non-operational condition) and visits by such locomotives would be supported by SRT:

LSWR		2-4-0WT		SR	WC/BB Class	4-6-2
LSWR	Class M7		0-4-4T	LMS	2MT Class	2-6-2T
LSWR	Class T3	4-4-0		BR	4MT Class	2-6-4T
LSWR	Class T9	4-4-0		BR	4MT Class	2-6-0
SR	U Class	2-6-0		BR	'Hampshire' DEMU	
SR	N Class	2-6-0		BR	Class 33 and 33/1	
SR	Q Class	0-6-0		BR	Class 73	
SR	QI Class	0-6-0		BR	Class 47	

Locomotives already based at Swanage or having visited are in *italics*.

COMMERCIAL/OPERATIONAL REQUIREMENTS

The Railway requires 4 steam locomotives throughout the year increased to 5 for the peak six weeks in July/August. There should normally be one locomotive of interest available (i.e. new to traffic, large in size or unusual to the line).

In addition 2 diesel locomotives capable of deputising for a steam locomotive are required at all times. This allows for steam locomotive failures and contingencies such as Fire Brigade bans during hot weather.

2 diesel shunting locomotives are required – 1 for shunting duties at Swanage and the other for infrastructure work and in reserve.

2 DMUs are required to support the weekend and evening diesel services from Easter to October.

In order to provide regular availability of locomotives as above the following basic fleet is required:

Type of traction	Commercial/operational requirement	Overall minimum requirement (Allowing for locomotives under overhaul)	Locomotives currently based at Swanage	Notes
Steam	4 (5 for July/August)	8 (5 'in traffic' and 3 under overhaul)	6695 30053 34028 34070 34072 80078 80104	Heavy maintenance on the 'in traffic' locomotives would be planned for periods of low demand. This provides the following availability: - 2 available - 1 or 2 spare (depending on heavy maintenance) - 1 available for minor maint.
Diesel	2	2	D6515 33 108	Assumption of heavy maintenance being undertaken during low demand periods.
Diesel shunting	2	2	D3591 08436	
DMU	2x2-car	2x2-car	108 117	

It would be desirable to have one more steam locomotive (preferably Class 3 or 4) to enable the overhauls of steam locomotives to progress more evenly. On completion of the overhaul work on the class 117 DMU and D3591 the diesel fleet should fulfil our needs through pre-planned maintenance.

It is possible to maintain services with one less locomotive than that specified above but with a corresponding risk of locomotive failure and service disruption. There is a commercial risk of up to £4,000 per day at peak periods if steam traction is not available.

HIRING OF LOCOMOTIVES

It is currently part of the running agreements that some of the steam locomotives can be hired out. It is SRCL's policy that locomotives in its custody may be hired out to other railways subject to availability. This policy will be particularly appropriate if we are in the situation of having 5 locomotives available (i.e. not under overhaul) for the whole of the year with four locomotives resident at the Railway and the fifth either under heavy maintenance or away on hire.

Locomotives may be hired in on occasion either to compensate of lower than desired availability of the Swanage based fleet or to provide variety (e.g. for special events)

MAINTENANCE

Maintenance is scheduled to take place on a regular basis and is undertaken by SRCL staff in accordance with the SMS. Maintenance of steam locomotives takes place as a result of mechanical inspections that take place on a weekly basis. Boilers are inspected as part of a more detailed examination that takes place after each washout. In addition a daily fit to run examination takes place.

Maintenance of diesel locomotives takes place on a similar basis but at intervals related to their usage. Under the running agreements for the diesel electric locomotives it is the responsibility of the owners to undertake maintenance above the level of a daily fit to run inspection.

All maintenance normally takes place at Swanage.

HEAVY REPAIR AND OVERHAUL

Under the running agreements most items in this category are the responsibility of the owner. It is hoped that by co-operation with owning groups the planning of this work will allow the provision of the required level of motive power at all times.

Most work takes place at Swanage although locomotives undergoing a full overhaul need to be taken off-site to alternative premises when full stripping and re-assembly takes place.

FACILITIES

The current facilities at Swanage are cramped and not really able to sustain the uses that they have to support. Most maintenance work is done on a single road shared with the preparation of locomotives for traffic. This prevents efficient use of staff time and consequently has an effect on locomotive availability. The table below summarises the minimum requirements for the satisfactory maintenance of locomotives:

Traction	Purpose	Requirements	Notes
Steam	Daily preparation	Pit, coal, water.	Separate facilities required for preparation and maint.
	Maintenance	Pit, water, air, electricity.	
Diesel (Diesel-Electric)	Maintenance	Pit, air, electricity.	Sharing of facilities possible.
Diesel (Shunting)			
Diesel (Multiple Units)		Long pit, air, electricity.	

Notes: In addition stores and workshop space is required.

Stabling and preparation of diesel traction can take place at any location.

Separate facilities are required for the heavy repair and overhaul of locomotives/units.

STAFFING

Due to its specialist nature much of the work on locomotive maintenance is done by qualified and experienced staff – most of whom are paid. There are, however, a small but growing number of volunteers who undertake work on locomotive maintenance and this is much appreciated – it is hoped that more volunteers can be encouraged to help with the work that is required.

There is a need for 3 to 4 fitters within the locomotive function of LCW with the requisite spread of skill sets in order to maintain locomotives correctly. Cross-working of staff within LCW is encouraged.

It is also recognised that there is a need to build up skills for the future and for this reason the training of staff through apprenticeships is encouraged when suitable opportunities exist.



CARRIAGE PLAN 2006-11

INTRODUCTION

This plan outlines the plans for maintaining the existing carriage fleet used by the Swanage Railway Company and how commercial and other needs may shape this in the coming years.

In line with the Railway's Strategic Plan these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s.

As part of the Strategic Plan the Carriage Plan takes into account the following objectives:

MARKETING

- Continue to review Disabled access to railway facilities.

LOCOMOTIVE, CARRIAGE AND WAGON

- Development of Locomotive and Rolling Stock plans to ensure availability of appropriate vehicles for services.

STAFF AND FACILITIES

- Continue to develop the volunteer workforce by concentration on both recruitment and retention.

FUNDING THE PLAN

Routine maintenance issues contained in the plan will be financed from revenue and funds for this purpose will be allocated through the annual spending plan and budget process. All projects that result in new or improved facilities (from their 2005 condition) will need to obtain a source of funding. Such sources include:

- SRCL reserves;
- Grants from SRT;
- Grants from external bodies.

Allocation of funding for projects will take place following the submission of a Project Form to the Board of Directors. This supports the process by which a project is managed and controlled.

In addition to funding the enhancements listed in this plan SRCL and SRT will work together to fund the overhaul and return to traffic of selected historic vehicles in the ownership of the SRT.

COMMERCIAL REQUIREMENTS

The peak requirement needs the following sets of coaching stock:

- 5 coach service set with buffet
- 5 coach service set without buffet
- 5 coach dining set
- 2 coach set for driving experience and special event use
- 1 spare passenger coach to allow for work in hand
- 1 spare brake coach to allow for work in hand

It is suggested that a spare brake coach is maintained due to the critical nature of these vehicles for operations.

In line with the need to cater more fully for disabled travellers it is proposed to investigate the cost of refurbishing the existing Disabled Coach SK(H) 24127 during 2008. If SK 25464 were also overhauled this would provide enough coaches to have a spare four coach set available for use which would ease maintenance schedules during the peak period and provide an additional degree of back-up should a major failure occur.

MAINTENANCE

Maintenance is scheduled to take place on a regular basis and is undertaken entirely by SRCL staff. The following schedule is maintained based on BR specifications.

Examination	Maximum exam Interval		Sequence
	Periodicity		
	Working Days	Calendar	
Daily	1		Sequence Is dependant upon utilisation
Weekly	7	1 Month	
4 (CMS123)	36	3 Months	
7 (CMS123)		6 Months	

Vehicles will be lifted annually for examination of top and bottom centre casting pivots.

To cater for the six-week period of peak operation the monthly examinations in July/August take place immediately before and after this period resulting in a slightly longer period between examinations than is desirable. Given the mileages concerned this is not deemed a matter for concern. Full details are contained in the LCW section of the SMS.

HEAVY REPAIR AND OVERHAUL

SRCL will undertake overhauls of the coaching stock in its care to ensure that it remains safe and in a state suitable for use. It is planned that all carriages will undergo a thorough overhaul every 10 years. SRCL is currently unable to undertake this work cost-effectively in-house and it is therefore undertaken off-site by contractors. In addition, an Intermediate Overhaul is planned halfway between General Overhauls. Intermediate Overhauls are planned to take place at Swanage. Full details are contained in the LCW section of the SMS.

5 years **Intermediate Overhaul**

Body & roof repairs and re-paint
Internal heavy clean, repairs as required
Overhaul of bogies
Examination of Vacuum brake system – repairs as required

10 years **General Overhaul**

Body

Sheeting repairs to body sides, ends and roof
Frame corrosion repairs at ends, door frames and body
Repair and overhaul of doors, fittings, locks; adjust doors
Repairs as required to windows and ventilators
Repaint body and roof
Interior
Seating re-trim as required
Repairs as required to; seating, tables, doors, panels, flooring, fixtures and fittings, toilets
Clean or paint ceilings
Varnish or paint vestibules, window frames, heater grilles, guards and luggage compartments

Bogies and Under frame

Examination of under frame and attachments – repairs as required
Removal of wheel sets, repairs as required
Check springs & components
Axle boxes exam
Adjust suspension and ride – heights
Brakes, gangways and running gear
Overhaul of vacuum brake cylinder, DA & PCA valves, where fitted overhaul of air brake system
Repair of gangway faceplates and plunger bushes
Repairs as required to; buffers, draw gear and couplers, electrical system
In addition to this overhaul schedule coaches may require repainting at more frequent intervals given the outside storage and seaside nature of the air.

There is still a need to develop a full plan for the overhaul of bogies. This currently takes place as required. It is hoped that we will be able to develop the skills to overhaul and maintain enough spare bogies that we can have a pair of each type of bogies stored in serviceable condition for use as required.

CARRIAGE ELECTRICS

Over the past 5-10 years a policy has been in place of fitting vehicles with a 240-volt charging system and in 2006 it is expected that the remaining unreliable 24-volt battery chargers can be taken out of use with all charging taking place from the 240-volt cables. There are still some vehicles that require final fitting out of lighting systems and these vehicles are not in public use during periods of darkness.

ELECTRIC TRAIN HEATING

Some coaches have equipment remaining and it is proposed to gradually reinstall ETH in a number of coaches for use during colder weather when steam locomotives are not being used. It is hoped that one service set and the dining set can be so equipped. This process will take place on a gradual basis.

AIR BRAKING

Whilst all carriages are equipped with vacuum brakes there are a small number of vehicles still fitted with air brake equipment. As work is done to these coaches this equipment will be maintained so that, should it be required at a later date, it will be practical to commission this equipment with a minimum amount of work. This process will take place on a gradual basis.

HERITAGE COACHES

The Swanage Railway Trust is currently overhauling the first of the heritage fleet and it is hoped that this will be entering service within the next year (subject to fundraising). Yet to be resolved are issues such as running agreements between SRT and SRCL. This will dictate whether these vehicles are treated as part of the running fleet or kept aside for special use. It is also important to recognise where funding for future work is going to be sourced for incorporation in running agreements.

STAFFING

Most routine maintenance is undertaken by a small group of paid staff (shared with Locomotive maintenance) supplemented by a small, but valuable, number of volunteers. Within the staff available there is expertise in bodywork, carpentry, electrical and mechanical work.

Most of the more major work is undertaken by the volunteer workforce at weekends assisted as required by the paid staff. This group undertakes, together with the paid staff, work up to the level of intermediate overhauls. It is hoped that the scope of work undertaken can be widened to include the preparation of some of the heritage coaches for use.

Volunteers are encouraged within the department and there is a Volunteer Co-ordinator who organises work for most weekends and an annual Carriage Working Week. Most work during the week focuses on routine maintenance of running vehicles. The railway has an active programme of training staff which includes the provision for both off-site and on the job training as best fits commercial and personal development needs.

FACILITIES

The facilities available at Swanage are far from ideal and work is starting on identifying future needs for carriage maintenance along side the requirements for both steam and diesel locomotive maintenance.

SEATING CAPACITY OF VARIOUS FORMATIONS

	4 coaches				5 coaches				6 coaches				Dining Set
	3 TSO	2 TSO+RMB	2 TSO+SK(H)	TSO+RMB+SK(H)	4 TSO	3 TSO+RMB	3 TSO+SK(H)	2 TSO+RMB+SK(H)	5 TSO	4 TSO+RMB	4 TSO+SK(H)	3 TSO+RMB+SK(H)	
BSK	224	204	192	172	288	268	256	236	-	-	-	-	82 + 32
BSOB	223	203	191	171	287	267	255	235	-	-	-	-	82 + 33
BCK	222	202	190	170	286	266	254	234	-	-	-	-	82 + 30
BG	192	172	160	140	256	236	224	204	320	300	288	268	82 + 0

	Vehicle	Last repaint	Repaint due	Last Gen. O'haul	Gen. O'haul due	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Owner	Description	Capacity
CATERING	1865 RMB	NIS	NIS	NIS	NIS	NOT IN SERVICE										Private	Buffet Car.	44
	1885 RMB	Jun-01	Jun-06	Oct-93	Oct-03 Overdue	INT.		INT.		INT.		INT.		INT.		Consort	Buffet Car.	44
	1937 KITCH	Dec-04	Dec-09	Apr-01	Apr-11	INT.					G. O.					SRCL	Kitchen Car - staff use	0
	347 PULL	Sep-04	Sep-09	Sep-04	Sep-14				INT.						G. O.	SRCL	Dining Car.	42
	3090 FO	Mar-04	Mar-09	Mar-04	Mar-14			INT.						G. O.		SRCL	Dining Car.	42
	4055 BAR	Apr-05	Mar-10	Intermediate Apr-05	Apr-10			G. O.						INT.		SRCL	Bar Car with circulating area.	Standing room only
	4803 SO	Apr-03	Apr-08	NIS	NIS	NOT IN SERVICE						G. O.		SRCL	Dining Car.	42		
BRAKE	9015 BSOB	Jul-01	Jul-06	Not Known	Nov-06	G. O.				INT.					G. O.	SRCL	Brake Coach with disabled facilities.	31 + 3 and 1 or 2 wheelchairs
	21205 BCK	Nov-03	Nov-08	Nov-03	Nov-13					G. O.					INT.	SRCL	Brake Coach with limited disabled	30
	35059 BSK	Nov-04	Nov-09	Nov-04	Nov-14		INT.					G. O.				Cons/ SRCL	Brake Coach with limited disabled	32
	35464 BSK	Jun-99	Jun-04 Overdue	Not Known	Sep-06	G. O.					INT.					SRCL	Brake Coach with limited disabled	32
	81410 BG	Jan-06	Jan-11	Apr-06	Apr-16					INT.					G. O.	SRCL	Full brake coach.	0
PASSENGER	4349 TSO	Jul-05	Jul-15	Jul-01	Jul-11				G. O.						INT.	SRCL	Open seating coach.	64
	4416 TSO	Oct-04	Oct-09	Oct-04	Oct-14	INT.					G. O.					SRCL	Open seating coach.	64
	4842 TSO	Mar-04	Mar-09	Mar-03	Mar-13					G. O.					INT.	SRCL	Open seating coach.	64
	4899 TSO	Not known	Not known	Not known	Nov-06		G. O.					INT.				Cons/ SRCL	Open seating coach.	64
	4945 TSO	Mar-04	Mar-09	Mar-04	Mar-14				INT.				G. O.			Cons/ SRCL	Open seating coach.	64
	4961 TSO	Mar-05	Mar-10	Mar-05	Mar-15				INT.					G. O.		SRCL	Open seating coach.	64
	4981 TSO	Aug-01	Aug-06	Not known	Apr-07		G. O.					INT.				Private	Open seating coach.	64
	4983 TSO	Dec-02	Dec-07	Dec-02	Dec-12				G. O.						INT.	SRCL	Open seating coach.	64
	24127 SK(H)	NIS	NIS	NIS	NIS	N.I.S.	G. O.							INT.		SRCL	Converted area for wheelchairs.	24 + 8 wheelchairs.
SRT	728 TK	NIS	NIS	NIS	NIS	NOT IN SERVICE										SRT	Compartment seating	56
	1381 TO	NIS	NIS	NIS	NIS	NOT IN SERVICE										Private	Open seating coach.	56
	1457 TO	NIS	NIS	NIS	NIS	NOT IN SERVICE										SRT	Open seating coach.	64
	4365 BTK	NIS	NIS	NIS	NIS	G. O.					INT.					SRT	Semi open brake	48
	4366 BTK	NIS	NIS	NIS	NIS	NOT IN SERVICE										SRT	Semi open brake	48
	5761 CK	NIS	NIS	NIS	NIS	NOT IN SERVICE										Private	Compartment seating	56
	6699 BCK	NIS	NIS	NIS	NIS	NOT IN SERVICE										SRT/ DLL	Brake coach.	32
	25424 SK	NIS	NIS	NIS	NIS	NOT IN SERVICE										SRT	Compartment seating	64



WAGON PLAN 2006-11

INTRODUCTION

This plan outlines the plans for maintaining the wagon fleet used by the Swanage Railway Company and how commercial and other needs may shape this in the coming years.

In line with the Railway's Strategic Plan these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s.

As part of the Strategic Plan the Carriage Plan takes into account the following objectives:

LOCOMOTIVE, CARRIAGE AND WAGON

- Development of Locomotive and Rolling Stock plans to ensure availability of appropriate vehicles for services.

STAFF AND FACILITIES

- Continue to develop the volunteer workforce by concentration on both recruitment and retention.

FUNDING THE PLAN

Routine maintenance issues contained in the plan will be financed from revenue and funds for this purpose will be allocated through the annual spending plan and budget process. All projects that result in new or improved facilities (from their 2005 condition) will need to obtain a source of funding. Such sources include:

- SRCL reserves;
- Grants from SRT;
- Grants from external bodies.

Allocation of funding for projects will take place following the submission of a Project Form to the Board of Directors. This supports the process by which a project is managed and controlled.

In addition to funding the enhancements listed in this plan SRCL and SRT will work together to fund the overhaul and return to traffic of selected historic vehicles in the ownership of the SRT.

REQUIREMENTS

A thorough review of wagon requirements will be undertaken to ensure that the stock on the Railway is appropriate to the following needs:

- Engineering department requirements;
- Storage requirements; and
- Heritage considerations.

MAINTENANCE

All wagons are currently maintained on the basis of a visual examination before each use and an annual examination by C&W staff. It is intended to revise these arrangements by creating a maintenance schedule for wagons in regular use and a separate system for wagons that see only infrequent use. This will be contained in the SMS.

HEAVY REPAIR AND OVERHAUL

Heavy repairs and overhauls are undertaken on a case-by-case basis. Following the review of requirements repairs at this level will be prioritised appropriately.

STAFFING

Most routine maintenance is undertaken by a small group of paid staff (shared with Locomotive maintenance) supplemented by a small, but valuable, number of volunteers. Within the staff available there is expertise in bodywork, carpentry, electrical and mechanical work.

Most of the more major work is undertaken by the volunteer workforce at weekends assisted as required by the paid staff. This group undertakes, together with the paid staff, work up to the level of intermediate overhauls.

Volunteers are encouraged within the department and there is a Volunteer Co-ordinator who organises work for most weekends and an annual Carriage Working Week which, despite its name, also includes work on wagons. The railway has an active programme of training staff which includes the provision for both off-site and on the job training as best fits commercial and personal development needs.

FACILITIES

The facilities available at Swanage are far from ideal and work is starting on identifying future needs for wagon maintenance along side the requirements for both steam and diesel locomotive and carriage maintenance.

There are limited facilities for woodwork repairs at Corfe Castle which are undertaken by a small group dedicated to this work.



INFRASTRUCTURE PLAN 2006-11

INTRODUCTION

This plan outlines the plans for maintaining and developing the infrastructure required by the Swanage Railway Company and how commercial and other needs may shape this in the coming years.

In line with the Railway's Strategic Plan these activities are to be undertaken within the context of developing the Railway's Safety culture and its ambience of the Southern Region branch line of the 1950s/ early 1960s.

As part of the Strategic Plan the Infrastructure Plan takes into account the following objectives:

INFRASTRUCTURE

General

- Survey of the infrastructure including identification of backlog issues and development of a plan to fund and undertake works to reduce or eliminate them.
- Provision of permanent facilities for the Infrastructure Departments
- Implement improvements to locomotive watering facilities and locations.
- Install carriage watering facilities at Corfe or Norden.
- Upgrading the line between Norden and Motala, including installing a level crossing at Norden.
- Planning for the works required subsequent to any transfer of responsibilities regarding the line to Furzebrook and Worgret Junction.

Civil Engineering and Permanent Way

- Progressive programme of upgrading of running line maintenance.
- Seek to take advantage of the main line connection to bring in materials and plant for maintenance.
- Provide permanent bank stabilisation at Harmans Cross.
- Relaying of track and work to drainage in Swanage station throat to include realignment of the exit from the Platform Loop.
- Installation of a footbridge at Corfe Castle.

Signal & Telegraph and Telecom

- Maintenance of signalling installations for service requirements.
- Phase 2 of Swanage signalling and commissioning of Platform 1 at Swanage station.
- Review of SR communication needs and identify improvements.

Stations

- Continued restoration of Corfe Station to a condition representing the 1950's.
- Development of the Goods Yard at Corfe including the former coal siding area.
- Feasibility Study into the creation of a footpath to or halt to serve Woodyhyde campsite.
- Provision of better facilities for passengers on the Down Platform at Harmans Cross.
- Development and implementation of plans to allow Platform 1 to be commissioned.

STAFF AND FACILITIES

- Continue to develop the volunteer workforce by concentration on both recruitment and retention.
- Identify necessary improvements to facilities and develop a plan to implement these improvements.

MARKETING

- Further development of the Park and Ride facility at Norden.
- Continue to review Disabled access to railway facilities.
- Investigation into the commercial possibilities of services to Furzebrook, Blue Pool and Worgret.

FUNDING THE PLAN

Routine maintenance issues contained in the plan will be financed from revenue and funds for this purpose will be allocated through the annual spending plan and budget process. All projects that result in new or improved facilities (from their 2005 condition) will need to obtain a source of funding. Such sources include:

- SRCL reserves;
- Grants from SRT;
- Grants from external bodies.

Allocation of funding for projects will take place following the submission of a Project Form to the Board of Directors. This supports the process by which a project is managed and controlled.

COMMERCIAL REQUIREMENTS

Within the constraints of the historic infrastructure current business requires infrastructure capable of carrying traffic levels that are higher than at any other time in the Railway's history. At current traffic levels there are a number of pinch points that need resolving and these include bringing in to use Platform 1 at Swanage Station so that the current practice of two trains using a single platform can be reduced significantly.

If traffic levels continue to increase then consideration will need to be given to increasing train lengths. This will be no small task but all modification work should take into account this possible future need.

MAINTENANCE

Maintenance is scheduled to take place as a result of regular inspections. Full details are contained in the Infrastructure section of the SMS.

HEAVY REPAIR, RENEWALS AND NEW WORKS

The key targets for work are:

- Improving running line standards (throughout);
- Commissioning Platform 1 at Swanage (2007/8); and
- Work to upgrade the line between Norden and Motala (2009/10)

Future overhauls of each mechanical signalling installations fall for Swanage in 2012 and Corfe Castle in 2015. In the case of Corfe Castle it may prove unnecessary to undertake such an overhaul if a new signal box is commissioned before this date.

Much of the provision for new work depends on final plans for the use, and subsequent operational requirements, of the line beyond Norden. As these are currently by no means clear the plans for associated new works are also subject to change.

FACILITIES

The current facilities for S&T and Permanent Way are scattered around the railway in various locations. These need to be rationalised in a central base which is rail and road connected with workshops, stores and staff facilities. There also needs to be a review of our requirements including plant and equipment and rail vehicles. We will plan to repair or replace what we have as well as for acquisitions and disposals as necessary to reflect current and future needs.

STAFFING

As the infrastructure expands on the Signalling and Permanent Way, and the need to upgrade maintenance to meet current and proposed safety requirements, more pressure is being placed on staff resources. It is hoped that more volunteers can be encouraged to help with the work that is required but there may still be a shortfall which will involve employing more staff.

DRAFT OUTLINE OF PLANNED WORKS

	Permanent Way and Civil Engineering	Signal & Telegraph and Telecom	Stations
2006	<ul style="list-style-type: none"> - Installation of a footbridge at Corfe Castle - Bank repairs at Pondarosa and Harmans Cross 	<ul style="list-style-type: none"> - Motala signalling - Harmans Cross / Corfe telephone concentrators. - Herston Bank phase I 	<ul style="list-style-type: none"> - New Coal conveyor - Work to improve paths at Norden P&R
2007	<ul style="list-style-type: none"> - Change Bridge timbers on Bridge 17 - Remedial work to Swanage station area. - Track alterations in connection with the commissioning of Platform I at Swanage - Reinstate Double Slip at Swanage - Herston bank loading dock 	<ul style="list-style-type: none"> - Harmans Cross mechanical locking overhaul and beam replacement - Installation of new 'phone exchange at Harmans Cross - Norden / Corfe key token machines + ground frame - Phase 2 of signalling at Swanage 	<ul style="list-style-type: none"> - Carriage servicing supplies - New loco shed water supply - Move carriage washer at Swanage
2008	<ul style="list-style-type: none"> - Relay Harmans Cross to Woodyhyde. - Relay Herston to Victoria Ave. Road Bridge. 	<ul style="list-style-type: none"> - Phase 2 of signalling at Swanage - Norden to Motala crossing telephone installation 	<ul style="list-style-type: none"> - Locomotive watering facilities at Norden - Revised arrangements for Birds Nest - Possible work to improve service to Woodyhyde camp site
2009	<ul style="list-style-type: none"> - Sub-base at Swanage - Up grading of Norden to Motala for stock movements 	<ul style="list-style-type: none"> - Norden ABCL Crossing preparation - Corfe signal box installation 	<ul style="list-style-type: none"> - New Road/Rail arrangements
2010	<ul style="list-style-type: none"> - Relay New Barn Bridge to Dickers Crossing. 	<ul style="list-style-type: none"> - Basic signalling on the line from Norden to Motala - Norden ABCL Crossing installation - Corfe signalling upgrade 	
2011	<ul style="list-style-type: none"> - Relay Victoria Ave. to Swanage 	<ul style="list-style-type: none"> - Corfe signalling upgrade 	