

Introduction

The 2009 Strategic Document was the first produced by the SVR as an agreed roadmap for the future development of the Severn Valley Railway up to 2020. It is felt that 2017 is an appropriate time to both review the achievements of the last seven years, sense check the original themes and targets and to bring in other priorities that have emerged in the last seven years

Text marked by a vertical bar in the left margin indicates additions made to the original 2009 text.



2009 – 2016

The 2009 Strategic Document summarised the history of the Railway from 1965 to 2009 and detailed the achievements made throughout this period.

Since 2009 the Railway has achieved many more significant milestones including:

2010 – The ex-Leicester Depot wheel drop was installed at Engineering Services Motive Power department and offers a safe and effective method for replacing springs or removing wheel sets from locomotives. Further investment in facilities at ESMP continued throughout the period, including CNC lathes and the rental of storage and office facilities along the back lane at Bridgnorth.

2011 – Major infrastructure investment was undertaken, renewing Arley Station platforms, drainage through the station and track in the vicinity. This was followed shortly by investment in the renewal of drainage and track through Bewdley tunnel.

2012 – The launch of a Share Offer to raise funds for several important Railway projects, including Bridgnorth Station development, the restoration of Great Western Carriages and locomotive 4930, Hagley Hall. The response was phenomenal and over 2 million shares were purchased.

2012 - The Railway launched the Severn Valley Railway Charitable Trust (SVRCT), an evolution of the Rolling Stock Trust. The widening of the aims of the Trust and new direction recognised the increasing need to raise funds to supplement revenues generated from trading and passenger services.

2012 - The formation of the Conservation and Heritage (C&H) Committee in recognition of the importance of protecting the built environment of the SVR. The C&H Committee is tasked with considering all capital work on the SVR in terms of their heritage impact. To improve the heritage aspects of the Railway where possible, including buildings, uniforms

Corporate Record	Number	Date	Issue	Author	Page	1
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11



2017 Review of the Severn Valley Railway Strategic Plan 2009 -2020 v6

and rolling stock for example and to work with external conservation bodies where appropriate .

2013 – The amazing commitment and hard work of our volunteers was formally recognised by the presentation of the Queen’s Award for Voluntary Service. The Lord Lieutenants of Worcestershire and Shropshire came to Kidderminster to present the award to the Railway.

2013 -The Railway launched the pilot year of its Heritage Skills Training Academy. In recognition that for the survival of the SVR and the heritage railway movement it is essential that young people are taught the traditional engineering skills required by a heritage railway. The recruits are placed within various departments to learn hands on skills, which are supplemented by undertaking appropriate college courses. Currently we have five apprentices working on the SVR. The Academy costs are funded jointly by the Holdings plc and the SVRCT.

2014 – The Railway headquarters moved from Bewdley to Comberton Place Kidderminster in to ex council offices, to provide a safer and more appropriate headquarters for the Railway and a way to have all the admin staff working under one roof.

2015 – The SVR celebrated its Golden Anniversary, remembering the founders and generations of volunteers since who have made the Railway what it is today. Events ranged from a pump trolley challenge to two royal visits in the year from HRH The Princess Royal and our President HRH The Duke of Gloucester.

2016 – Following twenty years of deliberation the construction of a Diesel Depot was completed at Kidderminster funded by SVR Holdings Plc, The Guarantee Company, The Charitable Trust, the SVR resident SVR Diesel Groups and private individuals. Sir Peter Hendy CBE opened the Depot on the 20th May 2016.

The Railway has also received through several other awards.

2015 HRA Large Group Award

2015 Facilitation Impact Award for the Engineering Services Project

2015 Group Travel Award Best Preserved Railway

2015 BBC Countryfile Magazine Heritage Site of the Year Award

2016 Arley Heritage Station of the Year

2016 HRA Modern Traction Award

Corporate Record	Number	Date	Issue	Author	Page	2
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11

The Mission Statement of the Severn Valley Railway

To reiterate the mission statement defines the essential purpose of the Company. The statement is considered when taking any decision that may affect the future of the SVR. The current mission statement although an accurate reflection of the SVR operation does not articulate the emotional and sense driven experience that a visitor gets from the SVR.

The 2009 mission statement states that:

“To preserve, maintain and operate the Severn Valley Railway as a working museum of railway history for the education and enjoyment of present and future generations.”

The 2017 mission statement states that:

“To enthuse and inspire an affection and understanding in our visitors and staff for the Severn Valley Railway and the bygone era of steam locomotion and heritage diesels through the operation and interpretation of the Railway infrastructure, locomotives, historic carriages and wagons.”



The Vision of the Severn Valley Railway

A vision statement is constructed to provide an aim for the Company; it says what we want to be, providing a focus for decision making. It should be genuine and come from the heart, it should be lofty challenging and compelling. In reviewing the Vision statement the two areas that are not mentioned explicitly and should be are volunteers or volunteering and the recognition of the historic importance of the built environment of the SVR.

The 2009 Vision Statement states that:

“For the Severn Valley Railway to be acknowledged as the leading heritage railway and recognised as a key visitor attraction in the UK with a reputation for quality in all aspects of customer service.”

The 2017 Vision Statement states that:

“The Severn Valley Railway will be a heritage railway of national standing respected in its success in bringing the 'golden' age of steam travel to life, for the seamless historic integrity of its locomotives, rolling stock, buildings and structures and generating a real feeling of pleasure and enjoyment to those that visit and within its active supporters.”

Corporate Record	Number	Date	Issue	Author	Page	3
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11



Key Principles Underlying the Vision

The following key principles expand on the 2017 Vision Statement to give more detail to the direction of travel for the Severn Valley Railway. No alteration has been made to the 2009 key principles.

- Recognised as the leading authority in the preservation of heritage railway skills
To preserve and enhance the skills and knowledge of our staff - paid and volunteer, to continue the preservation of knowledge to a high level of excellence.
- To recognise the skills of staff and develop resources to secure future operations
To develop the management structure (paid and volunteer) to maximise the benefits which can flow from a blend of volunteer and paid staff. To ensure that relationships are built and nurtured at all levels. To develop processes that appraise staff performance and identifies shortcomings so that through training and development continuous development can be achieved.
- Considered expansion of new and development of existing supporting revenue streams to reduce SVR's dependency on ticket income.
To be open to new ideas, to embrace change when it is needed and to demonstrate teamwork through a willingness to build on suggestions rather than find reasons why they will not work.
To be recognised for providing outstanding value for money to the visitor: to be recognised for providing excellence in both services and facilities; and through training and development continue to build the reputation of the Railway.
- Continually seek to improve the authentic presentation of the Railway
To be a conscientious guardian of the historic assets and to enhance the built environment infrastructure and rolling stock to preserve the history of the SVR.
- To be in a strong financial position
To generate sufficient funds from all Railway activities to finance future developments, improvements and maintenance requirements; to take prompt action to ensure appropriate contribution from all departments seeking productivity and performance improvements.
- To be able to prove SVR's performance as an effective organisation
To have a stronger up to date knowledge of our organisation, through performance managing all SVR activities.

Corporate Record	Number	Date	Issue	Author	Page	4
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11



Themes and Measures for the Severn Valley Railway

The themes and the measures were produced from consultation and provide the focus for the Railway for the ten-year period. For this review commentary has been added under each theme to indicate our success at achieving the measures and their priority for the remaining four years.

Under each measure is inserted a report item which gives an update against the measure. There is an indication of the status of this measure:

Achieved: Since 2009 the measure has been delivered.

Progress: Since 2009 some delivery has taken place but the measure needs to be completed.

Priority: Since 2009 there has been no action and this measure becomes a key priority for delivery.

Superseded: Events since 2009 mean that this measure is no longer applicable in its current format.

It has been indicated when a new measure has been inserted.

THEME 1: Protecting and Improving the SVR's infrastructure

- The storms of 2007 reminded the Railway that continued investment was needed in our infrastructure and IT to make the Railway more robust.

Measures:

- Bridgnorth –** Whole site to be reviewed urgently with a need to replace the refreshment room and provide improved MPD facilities.

Report – Progress. The creation of the Bridgnorth Development team has been an important achievement. Under the Chairmanship of David Postle, the team has created a masterplan for the station site. The masterplan has successfully achieved planning permission and the Railway has committed both to the installation of the new refreshment room and toilets and launched a further share offer whose sole purpose is to provide funds for Phase I and II of this important project.

ESMP has seen continual investment since 2009. Facility improvements have included the installation of a wheel drop, the removal of the cabin buildings from the Workshop floor, the

Corporate Record	Number	Date	Issue	Author	Page	5
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11

installation of CNC lathes, replacement of air compressor equipment and importantly increased levels of staffing to achieve an increase in our ability to overhaul locomotives.

With a successful share offer for Bridgnorth this measure will be completed within the ten years of the strategic plan.

- Diesel depot at Kidderminster – Planning application and funding progressing – needed to provide adequate centralized diesel repair facilities.

Report – Achieved, funding of the project was provided by the family of SVR organisations, diesel groups and individuals. The diesel depot building was officially opened in 2016.

- Develop guidance notes for protecting all the Railway’s built environment – to achieve high standards, as the SVR quite rightly prides itself on its locomotives and rolling stock.

Report – Progress. The Conservation and Heritage Committee was formed to protect and inform future development on the Railway. Station conservation plans have been completed for Bridgnorth, Hampton Loade and Bewdley. Plans are required for Arley, Highley and Kidderminster. This will be achieved by 2020.



THEME 2 Strengthening the Railway’s Financial Base

- This theme was concerned with the Railways ability to generate profits to fund future projects as the cost of maintaining its infrastructure increased.
- The theme also focused on financial forecasting and profiling so that the management and Board of Directors were better informed.

Measures:

- To have an understandable organisation structure – To clearly establish the roles and responsibilities within the structure that make the organisation ‘fit for purpose’ and advance planning to take advantage of seasonally based opportunities.
- If the organisation structure cannot be written down, then the organisation is not effective.

Corporate Record	Number	Date	Issue	Author	Page	6
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11

Report – Achieved. The organisation structure has been simplified with Senior Managers given clear job roles and responsibilities, reporting to the General Manager who is the main contact for both Boards of Directors. The Boards provide the leadership for the Railway. The organizational structure consisting of paid and volunteer staff is described and detailed in SMS-POL-101 the Safety Management System for the Railway available to all Working Members through SVRonline.

- Timely reporting of information – Currently the methods that used to hold information (financial and non-financial) are fragmented with key information held manually and at spate locations where consolidation in to usable formats is challenging.

Report – Achieved. The Accountant and Board have revised the financial reporting system. Whilst the profit and loss accounts report a month in arrears, the financial reports also include, balance sheet, creditor and debtor report and annual cash flow projection, which is updated with actual information through the year. The introduction of electronic purchase order system at MPD will be extended to other departments in the next twelve months.

- **NEW MEASURE:** To rebuild the Holdings Plc end of year cash position to £500,000 positive by the end of 2017. The considerable infrastructure investments of 2007 onwards in drainage, track renewal have depleted our finances, since 2015 the Plc has a plan in place to increase its end of year cash position.



Corporate Record	Number	Date	Issue	Author	Page	7
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11

THEME 3: Investing in Staff

- The theme stated that the Railway will always be a volunteer organisation supported by paid staff. It looked to the measurable success of the contribution of paid staff. It looks to innovative new ways to recruit and how to recognise and reward the contribution of both volunteers and paid staff.

Measure:

- Reducing the age profile of volunteers – Make the SVR an attractive social event, a place for young people to work and relax after hours.

Report – Priority. The Railway has ‘pockets’ of young people working on the Railway especially in a voluntary capacity. Particularly at Kidderminster Diesel Depot, Bewdley Station staff, Bewdley MPD. However, this has happened organically rather than as a planned activity. It should be encouraged and recruitment material adjusted to reflect the Railways desire to recruit people of all ages and experiences.

- Volunteer accommodation – To create an environment where families/group of people can come and volunteer to work the Railway and stay in suitable accommodation which will meet their needs.

Report – Priority. The Railway is looking to dramatically improve the quality of its volunteer accommodation through the construction of an accommodation block at Bridgnorth as a phase III of the project although this is predicted to be after 2020. Similar plans are also being developed for other locations.

- To improve staff loyalty and good relations.

Report – Priority. Whilst the introduction of a Working members thank you evening at The Engine House has now become a well attended and supported evening, there is a perception that there is less volunteer involvement in the important strategic decision making process. In 2017 the Holdings Board will be introducing consultation in to the organisation planning process which will include both directors and working members.

THEME 4: Ensure and improve the profitability of non ticket revenue streams.

- In 2009 we recognised as a Railway the need to develop and improve on our non-passenger and non-traffic business, and looking to be innovative.

Measures:

- To do what the SVR does better – To understand the profitability of current commercial operations and develop new opportunities to add to the offer and contribute to the profitability of the Railway.

Report – Achieved. With improved financial reporting the Railway has greater visibility of its commercial activities through the introduction of an Electronic Point of Sales system. All retail and catering activities have monthly targets set and the introduction in 2016 of stock takes through the year gives us greater visibility of trading margins in our secondary spend activities.

We continue to trial new events and continue with those that are tried and tested. We have also introduced new activities in the last three years including civil weddings and children’s parties at The Engine House.

There is still opportunity to expand and trial new commercial opportunities that complement the heritage steam operation.

- Importance of volunteers – Increased use of volunteer expertise – to utilise the expertise of members and stakeholders to support any existing and future activities.

Corporate Record	Number	Date	Issue	Author	Page	8
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11

Report - Priority. There are examples of best practice, the events that are run on the SVR each year by volunteers, the work undertaken by the Conservation and Heritage Committee. There is a working members' skills database, but there is no doubt that improvements can be made and that the cohesion of volunteers and paid staff is an important priority for the next four years.

- Ethical in all the SVR does – To make sure the ethics of any development are as far as possible are consistent with the heritage objectives of the Railway.

Report- Achieved. The two boards of Directors referencing conservation plans and the strategic document and their own personal knowledge and professional experience to make sure that any development is complimentary to the Railways core activities.



THEME 5: Strong Governance – responsible to all SVR Stakeholders

- The Directors and management responsibilities will be clearly understood internally and timely communication with stakeholders will improve.
- Ensuring that governance provides a secure framework to allow the business to succeed in a way that is clear to all.

Measures:

- Roles and Responsibilities – To ensure that there are clearly defined roles and responsibilities of boards, committees, and management.

Report – Progress. All paid staff have job descriptions detailing the key accountabilities. The management and leadership between Board and executive is defined in the Railway Safety Management System.

Report – Priority. Development and consolidation of departmental rolling 5 year plans.

- Communication internal and external – To define a communications policy for internal and external consumption of all railway activity.

Corporate Record	Number	Date	Issue	Author	Page	9
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11



Report - Progress. A communication policy has been written by the Marketing & Communications Manager with Working Member support. Communication via Noticeboard issue has been increased and in 2016 there has been a revision of Express Points, formerly the Working Members Newsletter to include more news items each month as well as a precis of noticeboard issues. The Railway launched an internal website in 2012 SVRlive which has been reviewed in 2016 and will be expanded in the next four years to provide greater communication to working members and other stakeholders.

External communication is primarily through the SVR website, social media platforms and increasingly utilising a growing email list.

- Safety – To ensure the safe operation of the Railway and all its activities conform to all current and future legislation.

Report- Progress. The Railway has invested resource in the utilisation of a SharePoint cloud based site that enables the safety documentation library to be kept and updated in one place. This is to mitigate against having duplicate or old copies of safety documentation existing around the Railway. All working members can get access to this documentation and all station sites have a computer with web access to allow local staff to access this material.

Safety audits have been initiated by a new Safety team, they monitor safety performance against our policies and procedures.

THEME 6: Look after SVR visitors – focus on high quality customer service

- The Railway business comes from the general public, particularly families and senior citizens. The number of purely railway enthusiasts may decline over the years. The cooperation and participation with other visitor attractions through local and national tourist organisations is vital to keep visitor numbers high.
- Railway visitors must have a brilliant experience at every visit to ensure they return.
- In the same way, we must look after all visitors in the widest sense, including those that use the internet, SVR members and shareholders.

Measures:

- Presentation of the SVR – The Marketing Committee will produce a recommendation document to the Joint Boards on an annual basis to inform the budget process, focusing on necessary projects to enhance the presentation of the SVR. The Marketing Committee will produce a policy on appearance, manner and dress for all staff.

Report- Superseded. This measure has been superseded with the creation of the Conservation & Heritage Committee who are responsible for the built environment and other issues regarding our historic integrity and a presentation committee which reports to the Guarantee Board who will be looking at issues regarding uniform and presentation of the Railway. Recommendations for expenditure will then come to wither board as part of the budgeting and capital expenditure programme.

NEW MEASURE: To review and improve our party booking system to prevent better utilisation of services and prevent over-crowding.

- Training – All front line staff to be given consistent quality training to give a consistently good welcome and reception to the SVR.

Report - Priority. The training given to front line staff such as ticket inspectors and booking offices is internal and of good quality the Railway needs to explore how it can lift its standards even further.

Corporate Record	Number	Date	Issue	Author	Page	10
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11



2017 Review of the Severn Valley Railway Strategic Plan 2009 -2020 v6

- A regular forum to be held with key staff as a means of monitoring our presentation to the public.

Report - Superseded. This has been superseded as above by the Conservation & Heritage Committee and the Presentation Committee reporting to the Guarantee Board.

Conclusion:

The Boards of Directors recognise the great contribution made by working members and shareholders to the ongoing success of the Railway and delivery of a considerable number of the measures above.

Following this review it is satisfying to note that a number of the measures have been achieved, but that a number remain to be prioritised in order that they can be completed within the next four years.

Corporate Record	Number	Date	Issue	Author	Page	11
	GEN-POL-103	06/05/17	1	N. Ralls (General Manager)	Pages	11