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## **WEST SOMERSET RAILWAY ASSOCIATION - CORPORATE PLAN 2026-2031**

### **Executive Summary**

This Corporate Plan sets out the West Somerset Railway Association's strategic direction for 2026–2031. The WSRA's overriding charitable purpose is to promote education in the heritage of the Railway from Taunton to Minehead, delivered through restoration, preservation, public display, volunteering, learning, community engagement, fundraising, environmental stewardship and collaborative partnership working.

Over the life of this plan the Association will focus on financial sustainability, public benefit, strong governance, disciplined risk management, the optimum use of our assets and the practical delivery of heritage outcomes. Priorities include completing the restoration of locomotives 4561 and 80064, developing plans for Ditcheat Manor, progressing a carriage-by-carriage restoration strategy, exploring covered carriage storage, strengthening membership growth and retention, expanding education and community engagement, developing the Railway's ecological heritage as a living corridor, modernising IT and digital engagement, and repositioning events as safer, collaborative, railway-based activities with a stronger educational and community purpose.

The plan recognises significant challenges: ageing locomotives and carriages, rising restoration and compliance costs, income volatility, competition for grants and donations, the need for continued governance improvement, reliance on volunteers and specialist skills, environmental and ecological expectations, climate and weather resilience, planning and regulatory requirements, public perception of steam railway impacts, and the requirement to maintain secure, resilient and effective IT, data, communications and membership systems. These challenges will be managed through a comprehensive Risk Register, annual action plans, costed annual business planning, rolling three-year financial planning, reserves management, project controls, Board oversight, performance measures and regular review.

Delivery will depend on constructive collaboration with WSRHT, DEPG, WSR Plc, members, volunteers, staff, Trustees, Advisors, funders, local communities, education partners, tourism bodies, environmental stakeholders, regulators and the wider heritage railway sector.

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The plan therefore places strong emphasis on transparent decision making, aligned policies and procedures, safeguarding, health and safety, data protection, conflicts management, sound financial controls, clear communications and evidence-based reporting of public benefit.

By implementing this plan, the WSRA aims to remain a stable, respected and effective charity: protecting its assets, growing its support base, improving financial and organisational resilience, widening public benefit, strengthening collaboration across the Railway family, managing environmental and operational responsibilities responsibly, and making a lasting contribution to the preservation, interpretation and enjoyment of the Railway's industrial, cultural, social and ecological heritage.



**BR Standard 4 locomotive 80064, currently under restoration**

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## **1 Introduction**

The West Somerset Railway Association (WSRA) is an incorporated registered charity which is dedicated to promoting education in the heritage of the Railway from Taunton to Minehead (the Railway), which has been, since 1976, the site of the UK's longest standard gauge heritage railway (WSR). It does this by:

1. Restoring, preserving and displaying railway locomotives, carriages, wagons and other artefacts (including documents, drawings, photographs, recordings and films) of historical interest and the buildings connected therewith.
2. Promoting the cultural, environmental and social heritage of the Railway, and delivering related events and activities for the public benefit.
3. Encouraging recreation, well-being or other leisure-time occupations connected with the railway, including voluntary work on the restoration and maintenance of the Railway from Taunton to Minehead, restoration work on our locomotives, carriages, wagons and other artefacts, and enabling opportunities for social cohesion and inclusion
4. Promoting individual learning and training in the skills required to maintain the heritage of the Railway.

The WSRA plays a key role in heritage preservation, education, volunteer support, and fundraising, working alongside the West Somerset Railway Heritage Trust (WSR HT), other heritage bodies and the not-for-profit company who operate a heritage railway on the line under a Light Railway Order, the West Somerset Railway Plc (WSR Plc).

While it does not operate the Railway itself, the WSRA is able to display and make available its historical assets for the public benefit, promote educational and community engagement activities and thereby incidentally support the Railway's unique character and operational activities.

This plan sets out WSRA's strategic objectives for the next 5 years, focusing on:

- Financial sustainability
- Growth in membership and volunteering
- Education and heritage outcomes
- Strong governance and increasing levels of collaborative, partnership working

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The plan aims to ensure WSRA remains stable, respected, and effective. We will do this by:

- Restoring, preserving and maintaining our heritage locomotives, carriages and artefacts
- Managing projects to promote, restore and preserve the heritage of the WSR
- Promoting volunteering on the WSR
- Supporting members and volunteers in their roles on the WSR
- Engaging with and increasingly close liaison and collaboration with the local community and relevant heritage organisations for mutual benefit and improved cohesion
- Raising funds to support charitable activities and to sustain the charity



**Volunteers at Minehead inserting rivets into the side tank of loco 4561 as part of its restoration project**

## **2 Objectives of the Association**

Currently the overarching objective of the WSRA is to promote education in the heritage of the Railway from Taunton to Minehead.

In addition to the methods outlined in its Articles of Association at Clause 3, Powers, the WSRA will achieve this by:

- Maintaining effectively the charitable status of the Association
- Safeguarding and enhancing the historical assets of the Association and the heritage of the Railway
- Establishing and maintaining an effective and efficient organisational management structure
- Maintaining a comprehensive Risk Register to inform planning decisions
- Producing an annual, costed, business plan
- Establishing effective and well-controlled preservation and restoration programmes for its locomotives, carriages and estates developments
- Establishing and delivering effective marketing, communications and fundraising strategies
- Searching for and achieving such grant funding as may be available
- Ensuring effective liaison and increasing collaborative working with the WSRHT, the Deisel and Electric Preservation Group (DEPG) and other such organisations as may be appropriate for public and mutual benefit, including WSR Plc.
- Community engagement and encouragement of events and projects for mutual community and Railway benefit.

### **3 Organisational Overview**

#### **3.1 Legal Status**

WSRA is a membership-based incorporated charity. Its governing document is its Articles of Association. Last reviewed and amended in 2022.

The WSRA is Governed by a Board of Trustees elected by members with powers to co-opt Trustees from the membership and Advisors where vacancies exist in the Board structure and according to need.

#### **3.2 Mission Statement**

To support and promote the Railway from Taunton to Minehead through restoration, preservation, education, volunteering, and fundraising for the benefit of present and future generations.

#### **3.3 Vision**

Our vision is to support as far as possible a thriving, sustainable Railway, backed by an engaged membership, strong finances, and a shared commitment to heritage and community.

#### **3.4 Our Guiding Principles**

In delivering this Corporate Plan the WSRA will:

- Act in accordance with its charitable purposes
- Place public benefit at the centre of decision making
- Work collaboratively wherever possible
- Be financially prudent
- Be transparent and accountable
- Value volunteers, members and staff
- Make decisions based upon evidence and managed risk

#### **3.5 Public Benefit**

3.5.1 The WSRA will evaluate the public benefit delivered through restoration, education, volunteering, community engagement, heritage interpretation and environmental activity and will report this annually to members

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### 3.6 Management and Governance Structure

This is an explanation of the organisation's legal structure, management team, decision-making processes, and governance structure.

#### Trustees and Staff

3.6.1 Overall responsibility for the WSRA rests with its Board of Trustees currently comprising a Chair, Vice-Chair and up to 8 other Trustees. We will ensure that there is an appropriate mix of skills, professionalism and experience on the Board, call upon additional Advisors to the Board, and look to engage with additional expert and professional volunteers to support the Board and the delivery of this Plan as and when required.

3.6.2 Currently supporting the Board there are three paid staff: an Administrator, a Finance Officer, and a Community Engagement Officer, who also currently acts as Secretary to the Board. There is also a part-time self-employed Fundraiser. At the time of writing this plan we are actively considering adding to this staffing complement, either through recruitment of further contracted staff or additional, business-focused, volunteers.

3.6.3 We will regularly review our resourcing requirements to ensure that the composition of our Trustee Board and staff complement is kept at the optimum level to meet our requirements and in particular to ensure that the aims, objectives and targets set out in this plan can be met; and that our staff costs are at an appropriate level given our size and objectives.

3.6.4 We believe that there will be opportunities for shared functions and resources between the WSRA, the DEPG and the WSRHT to increase collaboration between us, potentially achieve cost savings and make efficiency improvements. We aim to explore these in line with our governance structure and work with those other organisations and, where we can in line with our charitable objective and as appropriate, the WSR Plc, assess and implement any shared functions that we might agree.

3.6.5 If we need to seek an amendment to our Articles of Association to achieve this clear necessity to facilitate and increase collaboration, then we will engage with the Charity Commission as required.

3.6.6 We are fully aware of the resources required to safely manage an ambitious programme of Events in addition to the other work of the WSRA. We will ensure that sufficient and appropriate resources are available to make certain that any and all Events can be delivered effectively.



**Minehead Station**

Governance and Management- Trustee Roles and Responsibilities

3.6.7 Following the appointment of the new WSRA Chairman and Board in September 2025, a review of the structure and functions of the Board was undertaken. This was further reviewed in February 2026 following a review of the 2025 Rally. The current organisational chart is included at Appendix 1.

#### Clear roles and responsibilities, regular training and skills development.

3.6.8 Following the reviews mentioned above, the Trustees now have better defined roles and responsibilities and a clearer understanding about how they need to work in compliance with best practice. We will always work to ensure that Trustees, Advisors, Volunteers and WSRA staff have and maintain the necessary skills to fulfil fully and effectively their roles and responsibilities.

#### Succession and continuity planning.

3.6.9 As part of our structural and functional review and risk management processes we have reviewed and taken steps to ensure our ability to continue the effective functioning of the WSRA should any key Trustees or staff leave or otherwise become unable to fulfil their roles. We will continue to do this on at least an annual basis and following changes to the composition of the Board or to our business requirements.

#### Decision Making

3.6.10 We will work to ensure that all our decision making is fully aligned with our charitable objective and decisions are risk-aware and evidence-based. We will aim to ensure that our decision-making processes are transparent by openly sharing, when possible, the reasons and steps behind our choices, making them visible and understandable to stakeholders in order that we can build trust, ensure accountability, and allow for scrutiny.

#### Policies

3.6.11 We will ensure that we create and maintain a full range of policies which reflect best practice, build public trust, ensure compliance with legal obligations, and foster an ethical, transparent, and efficient operating environment. We aim to implement robust, regularly reviewed, and accessible policies that protect assets and reputation, and align with Charity Commission guidelines.

3.6.12 Where it is appropriate we will work with the WSRHT, DEPG and WSR Plc to have fully aligned policies and procedures.

#### Financial controls

3.6.13 We will maintain a disciplined financial control regime which has a comprehensive system of policies, procedures, and tools designed to ensure the accuracy of financial records, promote operational efficiency, prevent fraud, and ensure compliance with regulations.

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## Safeguarding

3.6.14 We will ensure that we maintain a robust safeguarding regime. This will include:

- Having a safeguarding policy that reflects the specific risks of our work, and reviewing that policy at least annually to ensure that it always reflects best practice.
- Setting out clearly defined and expected behaviours for all staff, volunteers, and Trustees to prevent bullying, harassment, and abuse of trust.
- Seeking to ensure that those in positions of responsibility can recognise, respond to, record, and report safeguarding concerns.
- Fostering an environment where concerns can be raised without fear of reprisal, and where whistleblowing is encouraged.
- Having clear, accessible procedures for reporting incidents internally and to external authorities (e.g., Charity Commission, police, local safeguarding partners).
- As with other key governance and operations, standards and protocols, guidelines and method statements we will work with our partners on the Railway to ensure that wherever possible our safeguarding policies and procedures are fully aligned with theirs.



**Flying Scotsman at Minehead Station**

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### Health and safety

3.6.15 We will implement a Health and Safety (H&S) regime which focuses on practical, risk-based management that protects staff, volunteers, and attendees at events and in our offices while enabling our activities. We understand fully that Trustees are ultimately responsible for safety, and we must protect volunteers in the same way as paid employees.

We will:

- Assign a specific Board member to oversee H&S, ensuring it is a regular agenda item.
- Ensure that that Board member is fully trained and cognizant of current H&S best practice.
- Review the H&S policy at least annually to ensure that it reflects and is compliant with best practice.
- Proactively identify what could cause harm in offices, during fundraising, or at events, creating and maintaining risk registers and mitigation strategies.
- Where there is overlap with our partners on the Railway we will work collaboratively with them to assess and manage risks.

### Data protection

3.6.16 We will maintain a data protection regime which is rooted in transparency, accountability, and security, focusing on building trust with donors, volunteers, and beneficiaries while complying with the UK GDPR, the General Data Protection Regulation and the Data Protection Act 2018.

### Conflicts of interest

3.6.17 We will actively take steps to manage via policy and procedure our decision making and processes to ensure Trustees act solely in the best interests of the WSRA, thereby avoiding both actual conflicts and the appearance of impropriety.





**Canine visitors at Minehead Station**

## **4 Goals and Strategic Objectives**

These are specific, measurable, achievable, relevant, and time-bound (SMART) targets that serve as "steppingstones" to the overall mission and vision.

### **4.1 Financial Sustainability**

We will secure the financial sustainability of the WSRA through disciplined financial planning, effective governance, risk-aware decision making, diversified income generation and robust operational controls. Our approach will be aligned with the annual costed business plan, the three-year financial plan, the Risk Register, project plans, policies and reporting arrangements described elsewhere in this Corporate Plan. We will aim to:

4.1.1 Build and maintain adequate reserves to meet anticipated expenditure, protect the charity against income volatility and provide resilience against the financial risks identified in the Risk Register, including increasing restoration, maintenance, compliance and operating costs.

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4.1.2 Diversify and strengthen income streams to reduce reliance on any single source, including membership growth, donations, legacies, grants, fundraising appeals, events where appropriate, corporate support and partnership opportunities, ensuring that all income-generating activity remains aligned with our charitable objectives and wider stakeholder engagement plans.

4.1.3 We will where possible look to generate income for the Association from the appropriate and best use of our assets.

4.1.4 Maintain robust financial systems and controls, supported by clear policies, documented procedures, segregation of duties where practicable, appropriate authorisation limits, accurate record keeping, fraud prevention measures, regulatory compliance and regular Board oversight.

4.1.5 Provide timely, accurate and meaningful financial reports to Trustees and management, including budget monitoring, cash flow, reserves, restricted funds, project expenditure, fundraising performance and forward forecasts, so that decisions are evidence-based and risks are identified early.

4.1.6 Ensure that annual budgets, three-year financial plans and fully funded annual business plans are prepared, approved, monitored and reviewed, with clear links to the Corporate Plan, restoration programmes, membership plans, events activity, staffing and volunteer resourcing requirements.

4.1.7 Apply effective project financial control to restoration, carriage, estates, IT, website and other major initiatives by using costed project plans, risk assessments, staged approvals, regular progress reporting and review of variances against budget and timetable.

4.1.8 Ensure that financial sustainability is supported by the wider control environment set out in this plan, including safeguarding, health and safety, data protection, cyber security, business continuity, conflicts of interest, procurement discipline, policy review and succession planning.

4.1.9 Use collaboration with WSRHT, DEPG, WSR Plc and other appropriate partners to explore shared functions, joint planning, aligned policies and cost-effective delivery where this is consistent with our charitable objectives, governance requirements and the protection of WSRA assets.

4.1.10 Report progress against financial sustainability objectives through agreed performance measures and Board review, enabling Trustees to take timely corrective action where income, expenditure, reserves, compliance or delivery risks move outside agreed tolerances.



**Stogumber Station**

## **4.2 The Railway from Taunton to Minehead**

The object of the WSRA is currently (May 2026) to promote education in the heritage of the railway from Taunton to Minehead: we will review our objectives to ensure they are appropriate to the needs of the Charity and should it be necessary to propose any amendment to our members seek regulatory approval as appropriate.

We envisage going forward to be able to:

4.2.1 Promote individual learning and training in the skills required to maintain the heritage of the Railway.

4.2.2 Provide financial and practical support to preserve the heritage of the Railway. This will cover grant funding for rolling stock, infrastructure and facilities when they fall within our Charitable Objectives.

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4.2.3 Restore and maintain our heritage assets to ensure that they are available for the public benefit: displaying them and by usage on the Railway.

4.2.4 Seek to align our funding priorities with other bodies involved in preserving the heritage of the Railway. We will aim to work constructively with the WSRHT to ensure the greatest possible breadth public benefit is achieved from the preservation and conservation of the heritage of the Railway.

4.2.5 Work with WSR Plc, the holders of the Light Railway Order for the line, either directly or in conjunction and partnership with WSRHT, DEPG and other bodies, to progress plans and projects that promote the preservation and conservation of the heritage of the Railway for the public benefit, subject to our charitable objectives.

4.2.6 Assist, where possible and required, with skills development and volunteer recruitment, subject to our charitable objectives.



**'Odney Manor' at Doniford Station**



### **4.3 WSRA Restoration Programme**

4.3.1 As a key element of fulfilling our objectives, we are working on the restoration of two locomotives appropriate for display for the public benefit by use on the Railway or elsewhere, 4561 and 80064, alongside the restoration and maintenance, in serviceable condition, of a fleet of railway carriages for similar benefit.

4.3.2 In all our restoration projects our approach will be to achieve best value and minimised risks by seeking the most appropriate and cost-effective provision of restoration work.

4.3.3 The timing of the return to service of the two locomotives, aimed for the spring and summer of 2028, is key as soon after then two of the current locomotives in service on the Railway, 9351 and Odney Manor, will need to be removed from service.

4.3.4 We are managing these projects carefully in the knowledge that, typically, heritage restoration projects can run both over time and over budget. We have produced appropriately detailed plans for both projects and will be using these along with the teams working on the restorations to closely monitor progress and, we hope, spot and manage any potential delays or additional costs.

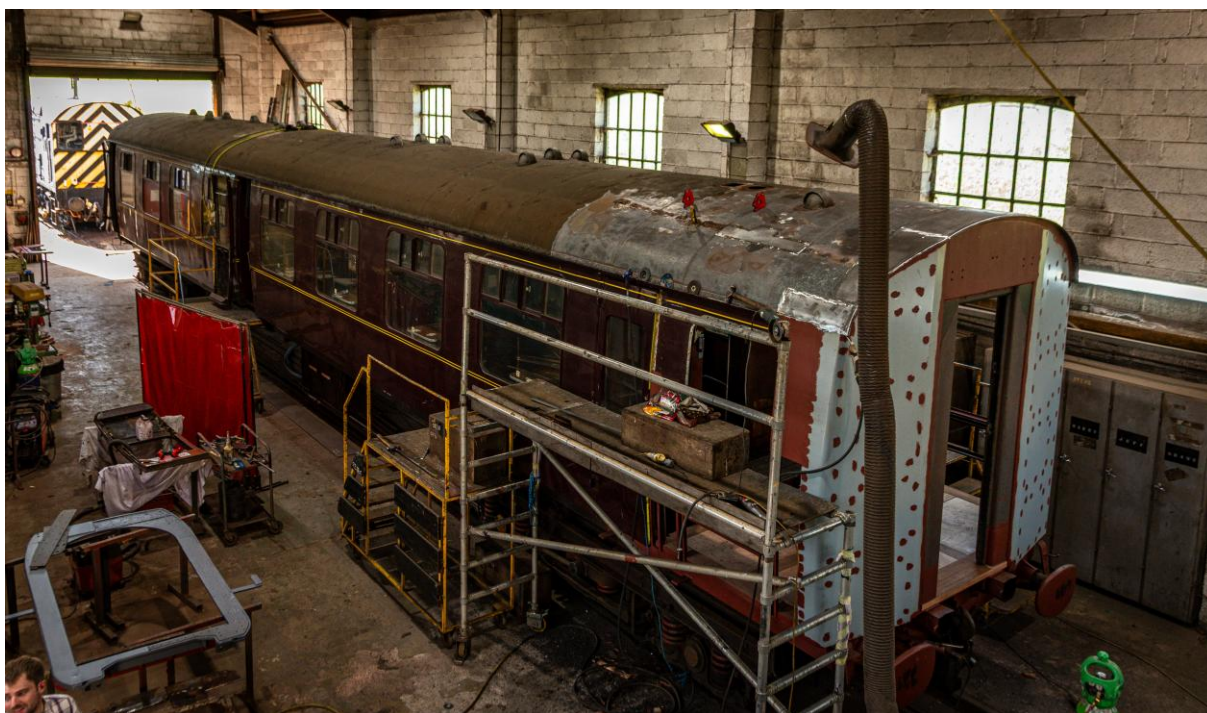


**The boiler for BR Standard 4 80064 being transported for restoration**

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4.3.5 During this plan period we will additionally aim to deliver a detailed plan and timescale for the restoration to operational condition Ditchheat Manor, which is currently safely protected from the elements and further deterioration in Swindon, displayed for the public benefit and education in the Designer Outlet Centre.

4.3.6 We are fully aware that age and the Somerset weather are taking their toll on the charity's carriages alongside those carriages and wagons belonging to the WSR Plc and others. For too long we have been maintaining the serviceability of the carriages by 'patching' rather than working to fully restore them. We feel that continuing with this approach is suboptimal as it will ultimately result in the charity's carriages not being able to be patched any further, become unsafe and unserviceable and they will cease to be available for the public benefit by display and usage; with, perhaps in the medium term, the resultant lack of appropriate rolling stock for display/use potentially being a considerable issue for the Railway as a whole.



**WSRA Carriage 4911 under restoration**



4.3.7 To effectively display and use them for the public benefit, the size and composition of the carriage fleet must take full account of the operational needs of the WSR Plc with regards to numbers of carriages, their availability and the facilities available in them. This includes making some of the carriages more accessible for people with mobility issues, disabilities, families with children, etc., and to develop inclusive passenger accommodation within the carriages to allow families to be able to stay together.

4.3.8 Ensuring the continuing means to display and use the WSRA's carriages for the public benefit needs to be achieved in close liaison with the WSR Plc and the WSRHT. We have therefore reinstated and are currently taking the lead in a Carriages Strategy Group, comprising key players from all the parties involved. This Group aims to produce a detailed, carriage by carriage, prioritised plan for their restoration. This will consider not just the optimum order of the work but also how that can be most effectively and economically delivered.

4.3.9 This Group will also consider the business requirements for on-Board catering and make recommendations as appropriate. This includes the provision of buffet carriages as well as more formal dining.

4.3.10 While we are in the very early stages of planning this activity, if funds permit, we hope to be able to restore at least one carriage per year, starting as soon as possible and as funds allow. This will be time-consuming and expensive work, but we believe it is the right approach to ensure the longer-term availability of the carriages to run and be displayed on the Railway.

4.3.11 Once the carriages are fully restored – and indeed before then, if possible, to slow down their deterioration – we hope to have access to an appropriate shed or sheds or other facilities to store the carriages in when not in use to protect them from the worst of the weather and to allow necessary day-to-day and preventative maintenance on them to be carried out.

4.3.12 Within the period covered by this plan we therefore hope to:

- a. With our partners on the Railway, advance a feasibility study into delivering secure, purpose-built carriage shed(s) or other cover for carriages, on WSRA, HT, WSR PLC or adjoining land.
- b. Initial consideration of this requirement suggests that providing a single shed in one location may be neither practical nor operationally efficient; and so therefore a distributed solution along the line is likely to be the optimum solution.

- c. Work to establish and support a cross-organisation project team and project plan to progress the initiative. The work of this team will be informed by the operational needs of the Railway and the need to secure the protection and preservation of the Railway's fleet of carriages.
- d. The project team will need to:
  - i. Confirm the operational and preservation requirements;
  - ii. Assess optimum locations for the carriage shed(s);
  - iii. Commission preliminary design and architectural proposals;
  - iv. Seek pre-application advice from planning authorities; and
  - v. Launch a dedicated fundraising appeal to support capital development.



**GWR Manors 7802 & 7812 Double Heading at Castle Hill**

#### **4.4 Membership Growth and Engagement**

4.4.1 The WSRA is planning to run a three-year programme to modernise and grow membership. While the planning for this is in its early stages, initial plans include adding to the legacy “magazine + discount” model to a tiered, digital, experience-led offer that provides clear, practical value and regular engagement. Tiers potentially will include Digital, Standard, Supporting, Patron/Platinum, and Young Member. We will also look to add a Corporate membership category. We intend that the digital core membership will deliver a monthly newsletter, behind-the-scenes and restoration video content, members-only streams, early announcements, and “Inside the Railway” talks.

4.4.2 We are considering introducing a members’ portal which will host Journal/video archives, downloads, priority booking and discounts, volunteering pathways, fundraising trackers, and a moderated forum.

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4.4.3 We hope to implement a programme of Member experiences—such as members-only trains, previews, depot/signal box tours, photography evenings, charters, Q&As, and restoration open days. These will focus on high perceived value at low marginal cost, alongside welcome packs, improved cards, recognition, and a family/youth programme that builds progression into volunteering. As with other initiatives and governance arrangements, we will aim to work in full collaboration with our partners on the Railway to dovetail our offerings and practices with them and theirs.

4.4.4 Recruitment will be made easier with ‘low-friction’ joining supported by clear “Why join WSRA?” messaging and a simple benefits grid. Recruitment campaigns should link membership to emotive fundraising (e.g., restoration projects like 80064), using social media and the Journal as primary funnels, supported by partnerships across the heritage and local tourism ecosystem.

4.4.5 Event-based activity will include staffed stands, live portal demos, and on-the-spot incentives. Retention will be driven by regular updates, transparent impact reporting, frequent personal recognition, participation loops (events, volunteering, feedback), and ongoing promotion of benefit usage.

4.4.6 Delivery milestones: Once we start the programme, we will aim to deliver it in the following phases:

- Phase 1 - update literature and webpage, launch newsletter and social recruitment, streamline joining, publish benefits summary;
- Phase 2 - launch portal, introduce exclusive events and welcome packs, start recognition schemes, embed membership CTAs in fundraising;
- Phase 3 - roll out full tiered structure including youth, expand video/livestreams, hold an annual members’ event, run a visible growth campaign.

4.4.7 Success will be tracked via growth, engagement, retention/satisfaction, conversion/income, and meaningful KPIs. The programme is planned to be low-capital, with risks mitigated through clear value communication, an enhanced user experience, phased rollout, and compliant data practices under a defined governance model.

4.4.8 To deliver and manage this programme we will work in close cooperation with the Volunteer manager recently appointed by the WSR PLC.

4.4.9 Overall, this initiative is designed to provide a practical path to increased membership, stronger income, more volunteers, and greater organisational resilience.



**Young supporters of the Railway at Minehead Station**

#### **4.5 Education and Heritage**

4.5.1 We will seek to raise the profile and visibility of our charity while expanding our educational and heritage activities by:

- a. Providing educational and heritage information through our website and social media, together with station notice boards, community centres, libraries and our Journal and other relevant publications.
- b. Working with schools, colleges, and other educational institutions to promote an understanding and appreciation of railway heritage, encourage membership and long-term engagement, and inspire future volunteers and supporters.
- c. Developing opportunities for apprenticeships, training programmes, work placements, and other learning experiences that support skills. development, while helping to grow our membership and volunteer base.
- d. Collaborating with local communities, charities/non-profits, and youth organisations to develop and deliver educational, heritage, and community engagement activities.



- e. Creating opportunities for disadvantaged and underrepresented groups, for example, special education needs, neurodivergence, and those living with dementia, to participate in and enjoy railway-related activities.
- f. Preserving, interpreting, and promoting historic railway assets for the educational benefit and enjoyment of members, volunteers and visitors.
- g. Increasing our involvement with the 'Trackers' youth initiative, plans for which plans include training modules linked to Duke of Edinburgh skills and to the Scouts Skills programme, and supporting the growth of WSRA youth membership and participation.
- h. Developing partnerships with museums, galleries, arts organisations, and heritage bodies, including initiatives such as railway-themed exhibitions, competitions, and creative projects.
- i. Producing and promoting a series of illustrated station walks that provide engaging educational and historical information about the railway and its importance to the local communities.
- j. Supporting participants in the Duke of Edinburgh's Award Scheme and similar programmes through volunteering, learning, and skills-development opportunities.
- k. Participating in exhibitions, displays, and public information events, including regular Railway family events, Rail 200, Dunster Show, the Lorna Doone carriage, libraries, tourist information centres and station-based displays.
- l. Expanding environmental education opportunities through projects that promote wildlife conservation, biodiversity, habitat enhancement, station gardens, and tree-planting initiatives, such as Norton.
- m. Strengthening community engagement and participation along the railway line.

4.5.2 We appreciate that this is a potentially large amount of work but feel that our aspirations in this area are key deliverables to meet our charitable objective.

4.5.3 There is clearly a considerable overlap with the activities of the HT in this work and we therefore will hope to work in close collaboration with them to both achieve our educational and heritage activities and to support theirs.

## **4.6 Governance and Reputation**

In all our activities we will:

4.6.1 Maintain high standards of charity governance.

4.6.2 Comply with law, regulation and best practice.

4.6.3 Strengthen relationships with all involved in the preservation of the heritage of the Railway and other railway bodies.

4.6.4 Protect and enhance the WSRA's public reputation.

4.6.5 Support and enhance 4.6.1 to 4.6.4 by continuing to widen the knowledge and ownership of the WSRA's overriding Code of Conduct through a focused and regular program of circulating all current and future policy documents as they may be written or amended to all staff, Trustees, Advisors and volunteers. This will extend to all "3rd party" volunteers acting under the auspices of the WSRA on either a short term or an ongoing basis. This will include all those who are either currently involved or to become involved in any WSRA led events wheresoever they are held.



**40s Weekend at Dunster Station**

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## **5 Situation and Market Analysis**

This is an assessment of the internal and external environment in which the Association operates.

### **5.1 Key Stakeholders**

The successful delivery of the charity's aims and objectives depends upon maintaining strong and productive relationships with a wide range of stakeholders. We will seek to enhance engagement, communication, and collaboration with the following groups:

5.1.1 WSRA members. Our members are at the heart of the WSRA and provide vital support through their membership, volunteering, fundraising, donations/legacies, advocacy, and participation at events and the AGM. Our plans for improved engagement with our members is set out at 4.4 above.

5.1.2 WSRA Volunteers. We understand fully the importance of the potential volunteer workforce in helping us to achieve our aims and objectives, whether that might be to assist in restoration projects, the delivery of an events programme, or in support of our heritage, outreach and education work. We will need to work closely with other members of the Railway family to achieve optimum levels of volunteer engagement, retention, development and long-term satisfaction.

5.1.3 The Boards, Staff and Volunteers of all other organisations within the WSR family. We understand fully the importance of effective collaboration with our partner organisations and will continue to work hard to achieve this, in both formal meetings and informal discussions. We will work to agree and build common approaches to common issues, through forums such as the Financial Resilience Group, the Communications Advisory Group, and the Carriages Strategy Group; and also by working on joint strategic and other plans.

5.1.4 Local communities. The communities served by the railway are key stakeholders and beneficiaries of our work. We will seek to raise awareness of the WSRA and its charitable activities, encouraging greater community participation, volunteering, fundraising support, donations, legacy giving, and visits to the railway.

5.1.5 Educational establishments. Schools, colleges, universities, and other educational organisations provide opportunities to promote railway heritage, learning, and skills development. We will work with educational partners to develop heritage education activities and explore opportunities for apprenticeships, training, work experience placements, and volunteering, helping to build long-term engagement with future generations.

5.1.6 Heritage funders. Grant-giving bodies, charitable trusts, foundations, and other funding organisations are important partners in supporting our heritage, education and restoration activities. We will continue to develop strong relationships with funding providers and pursue opportunities to secure investment in our charity's future.

5.1.7 Local authorities and tourism bodies. We will maintain constructive relationships with local authorities, statutory agencies and tourism bodies to promote the railway's economic, educational, cultural, environmental, and tourism benefits to the local area.

5.1.8 The broader Heritage Railway community. The railway family benefits from collaboration and knowledge-sharing across the heritage railway sector and support from the Heritage Railway Association. We will continue to engage with industry bodies, heritage railway organisations, specialist groups, and railway publications to share best practice, learn from others, and promote the work and achievements of the charity and railway family.



**The DMU at Watchet Station**

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## 5.2 External Environment

The WSRA operates in an external environment that is increasingly complex and uncertain. Although public interest in heritage, volunteering, tourism, community activity and environmental education remains strong, our ability to plan and deliver the ambitions in this Corporate Plan is affected by economic conditions, regulatory expectations, environmental responsibilities, public attitudes, partner capacity, infrastructure constraints and the wider challenges facing the heritage railway sector. These factors will be reflected in the Risk Register, annual business plan, financial planning, project approvals and communications activity.

Key external factors include:

5.2.1 Economic pressures and inflation. Rising costs for materials, labour, transport, insurance, utilities, compliance, restoration, IT and professional advice may affect the affordability and timing of projects. Inflationary pressure can also reduce members', donors' and visitors' disposable income, affecting subscriptions, donations, event income and fundraising appeals.

5.2.2 Funding competition and grant conditions. Heritage, education, environmental and community funding is competitive. Funders increasingly expect clear public benefit, sound governance, financial resilience, realistic delivery plans, environmental sustainability, inclusion, accessibility, evaluation and long-term legacy. This reinforces the need for costed project plans, impact reporting and strong stakeholder support.



**'Mayflower' in the Bishops Lydeard engine shed**

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5.2.3 Ageing heritage assets and technical capacity. Locomotives, carriages, wagons, buildings and associated artefacts require specialist skills, parts, materials, facilities and sustained funding. Deterioration caused by age, weather exposure and heavy use can accelerate costs and make delivery timescales uncertain, particularly where covered storage, workshop capacity or specialist contractors are limited.

5.2.4 Environmental and ecological expectations. The railway corridor is both a heritage asset and a living landscape. Planning for restoration, events, visitor facilities, carriage storage, vegetation management and infrastructure work must take account of biodiversity, protected species, habitats, drainage, tree management, landscape impact and opportunities for environmental education and nature recovery.

5.2.5 Steam railway environmental impacts. Operating and supporting a steam railway brings particular environmental considerations, including coal supply, emissions, smoke, ash disposal, water use, lineside fire risk, public perception of fossil-fuel use and future expectations around carbon reduction. The heritage railway sector continues to emphasise responsible low-volume use of high-quality steam coal, research into alternative fuels, efficiency improvements and environmental mitigation, but WSRA planning must recognise that these issues may affect costs, reputation, operations and public messaging.

5.2.6 Climate change and weather resilience. More frequent severe weather, heat, drought, storms or prolonged wet periods may affect trackside habitats, embankments, drainage, visitor access, events, restoration timetables, buildings, stored rolling stock and volunteer working conditions. These risks increase the importance of covered storage, maintenance planning, insurance, emergency arrangements and business continuity.

5.2.7 Regulation, compliance and planning consent. Charity regulation, health and safety, safeguarding, data protection, environmental law, planning controls, building requirements and railway-related regulation all influence what the WSRA can do, how quickly it can act and what evidence or permissions are required. Major projects such as carriage storage, events, public access improvements or heritage displays may require early engagement with regulators, local authorities, landowners and partner organisations.

5.2.8 Volunteer and skills availability. The heritage railway sector depends heavily on volunteers and specialist skills. Demographic change, competing demands on people's time, changing expectations of volunteering, training requirements and the need for safe systems of work may constrain delivery unless volunteer recruitment, retention, development and succession planning remain central to our approach.

5.2.9 Tourism, visitor behaviour and community expectations. The Railway contributes to the local visitor economy, but visitor numbers and spending can be affected by weather, transport costs, economic confidence, competition from other attractions and changing leisure habits. Local communities may also expect visible public benefit, reduced nuisance, safe events, sensitive environmental management and clear communication about projects and disruption.

5.2.10 Partner capacity and railway-family alignment. Many WSRA ambitions depend on effective collaboration with WSRHT, DEPG, WSR PLC, local authorities, funders and community partners. Differences in priorities, capacity, governance requirements, operational pressures or financial position may affect the timing and deliverability of shared projects, events, communications and funding bids.



**BR Class 14 'Teddy Bear' D9526 at Bishops Lydeard Station**

5.2.11 Digital, cyber and data risks. Greater use of online membership, fundraising, communications and cloud-based systems creates opportunities but also exposes the charity to cyber threats, data protection duties, supplier dependency, system outages and reputational harm if controls are weak. These risks must be reflected in IT planning, training, backup, access control and business continuity arrangements.

5.2.12 Reputation and public accountability. As a charity working in a visible heritage and community setting, the WSRA must maintain public trust. Poor communication, unmanaged environmental concerns, weak governance, unsafe events, unclear financial decisions or unresolved stakeholder tensions could affect membership, donations, volunteering, funding and partner confidence.

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## **6 Ecological Heritage and the Living Corridor**

Beyond its tourism and cultural value, the 21-mile railway corridor functions as a vital, linear nature reserve that brings significant ecological benefits to the West Somerset landscape. Acting as an undisturbed sanctuary for local wildlife, the line cuts through diverse habitats and provides a protected corridor where native flora, birds, insects, and small mammals can thrive away from intensive agriculture and urban development. By preserving the natural embankments, verges, and ancient trackside hedgerows, the Association can actively promote biodiversity and environmental conservation. Integrating this "living landscape" into our educational and community outreach will highlight the West Somerset Railway not only as a monument to historic transport, but also as a crucial, sustainable asset for regional conservation and ecological well-being.



**60007 'Sir Nigel Gresley' on Ker Moor**



## **7 Events**

### **7.1 The Steam Rally**

7.1.1 The Steam Rally has always been the biggest fundraising event of our year and had usually secured more than £30,000 for the WSRA. For various reasons we however needed to postpone the Rally for 2026. This is because recent events, evidenced comprehensively in a Rally Review report commissioned by the Trustees, have shown that the resources required to run an event the size and complexity of the Rally safely and to ensure all risks are effectively managed are difficult to find; and the potential income does not balance out the resource requirement and risks to the WSRA.



**Vintage Miniature Steam at a WSRA Rally**

### **7.2 Events along the Railway**

7.2.1 We fully intend, nevertheless, to plan and deliver a programme of events to maintain the engagement with the Rally community and importantly to reconnect the events to the Railway – a gap that has grown over the last few years, prioritising education in the heritage of the line. We will do this in full collaboration with the other members of the Railway family, and particularly the WSR PLC Gala planning team.

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7.2.2 We believe that we will also need to change the emphasis of events from an attempt to raise funds to become more about community engagement and education; and by adding attractions at stations along the line, enhance visitors' experiences at Galas and other events on the Railway.

7.2.3 This should provide, while perhaps not being initially at least the full Steam Rally experience of past years, a larger number of opportunities for the exhibitors to showcase their various vintage steam engines, tractors, agricultural and industrial machinery, militaria, classic and commercial vehicles and other related memorabilia.

7.2.4 This changed emphasis will of course have an impact on our annual income and has not been an easy conclusion for us to reach; but we need to be realistic about what we can safely achieve.

7.2.5 To work on this programme of events we are in close discussion with various members of the Rally Committee and are looking to incorporate them into a new Events Committee with a direct line to the WSRA Trustees.

7.2.6 We are in the process of establishing a formal sub-committee reporting to the WSRA Board to manage the planning for and delivery of events. This sub-committee will need to work in close liaison and collaboration with our partners on the Railway. This sub-committee will be chaired by either a Trustee or an Advisor with the requisite skills, background and experience to ensure that the findings of the Rally Review report are fully understood and the recommendations therein are fully implemented.

## **8 Communications**

Effective communication is central to the delivery of this Corporate Plan. It supports membership growth, fundraising, volunteer recruitment and retention, education, heritage interpretation, community engagement, partnership working, reputation management and public accountability. Our communications will be clear, consistent, timely, accurate, inclusive and aligned with our charitable objectives, governance responsibilities, Risk Register, annual business plan and wider stakeholder engagement requirements.

### **8.1 Communications objectives**

8.1.1 Explain clearly the role, purpose and impact of the WSRA, including its charitable objective, its contribution to preserving the heritage of the Railway from Taunton to Minehead, and the public benefit delivered through restoration, education, volunteering, community engagement and fundraising.

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8.1.2 Support membership growth and retention by providing regular, relevant and engaging communications that demonstrate value, recognise members' support, promote participation and clearly explain opportunities to join, renew, donate, volunteer and engage with WSRA activities.

8.1.3 Strengthen fundraising and grant support by communicating the need, purpose, cost, progress and impact of restoration, carriage, estates, education, events and community projects in ways that are transparent, compelling and evidence-based.

8.1.4 Improve internal and partner communications with Trustees, staff, volunteers, members, WSRHT, DEPG, WSR Plc and other appropriate organisations so that planning, events, restoration activity, education, risk management and public messaging are coordinated wherever possible.

8.1.5 Protect and enhance the WSRA's reputation by ensuring communications are professional, accurate, respectful, consistent with agreed policy positions and responsive to questions or concerns raised by members, volunteers, partners, funders, regulators, local communities and the wider heritage railway sector.



**Washford Station**

## 8.2 Audiences and channels

8.2.1 We will tailor communications to the needs of key audiences identified in this plan, including members, volunteers, donors, potential supporters, local communities, educational establishments, heritage funders, local authorities, tourism bodies, partner organisations and the wider heritage railway community.

8.2.2 We will use an appropriate mix of channels, including the WSRA website, email newsletters, the Journal, social media, press releases, events, station displays, educational materials, community venues, member meetings and direct communications with volunteers and stakeholders.

8.2.3 Digital communications will be developed in line with the IT, website and data protection controls set out elsewhere in this plan, including secure systems, appropriate permissions, compliant mailing lists, accessible content, business continuity arrangements and cyber security awareness.

## 8.3 Content priorities

8.3.1 Communications will give regular visibility to restoration progress, carriage strategy, heritage interpretation, environmental and ecological heritage, education and outreach, events, volunteering opportunities, member benefits, fundraising appeals, project milestones and the practical impact of donations and volunteer time.

8.3.2 We will communicate governance, policy, risk and performance matters in a proportionate and accessible way, including progress against the Corporate Plan, annual business plan, Risk Register, financial sustainability objectives, safeguarding, health and safety, data protection and other policies where relevant to members and stakeholders.

8.3.3 Events communications will support the revised events approach set out in this plan by promoting safe, well-planned, collaborative and educational railway-based events that enhance community engagement, visitor experience and public understanding of railway heritage.

## 8.4 Governance, responsibilities and review

8.4.1 The Board will maintain oversight of communications strategy, key messages, reputational risk and policy alignment. Day-to-day communications activity will be coordinated through agreed roles, supported by staff, Trustees, Advisors and volunteers with appropriate skills and clear responsibilities.



8.4.2 We will work through appropriate internal and shared forums, including where relevant the Communications Advisory Group and other Railway family groups, to encourage joined-up communications, avoid conflicting messages and support collaborative planning.

8.4.3 Communications activity will be reviewed regularly against agreed measures, including membership growth and retention, volunteer enquiries, fundraising response, website and newsletter engagement, event promotion, media coverage, stakeholder feedback and progress against annual action plans.

8.4.4 We will use feedback, performance data and lessons learned from campaigns, events and stakeholder engagement to improve future communications, update annual communications plans and ensure that our messages continue to support the long-term sustainability and reputation of the WSRA.



**‘Clun Castle’ and ‘Lady of Legend’ at Bishops Lydeard Station**

## **9 Financial Planning**

Financial planning will provide the framework through which the WSRA turns this Corporate Plan into affordable, controlled and deliverable annual activity. It will support the charity's financial sustainability, protect reserves, align resources with agreed priorities and ensure that Trustees have the information needed to make timely, evidence-based decisions.

9.1 The Board will approve and maintain an annual budget, a fully funded annual business plan and a rolling three-year financial plan. These will be linked directly to the Corporate Plan, the Risk Register, restoration programmes, carriage strategy, membership development, events activity, staffing and volunteer resourcing, IT and website requirements, education and community engagement.

9.2 Annual budgets will include clear assumptions for income, expenditure, reserves, restricted funds, project commitments, fundraising targets, grant income, membership income, staffing costs, events costs and planned capital or IT expenditure. Significant assumptions will be reviewed against known risks, capacity constraints and deliverability before budgets are approved.

9.3 The three-year financial plan will be used to test affordability, identify funding gaps, plan reserves, anticipate cash flow pressures and prioritise activity. It will take account of major restoration and carriage commitments, potential facilities development, the changed events model, membership growth aspirations, grant funding opportunities, inflation, compliance costs and the wider cost pressures identified in the external environment and Risk Register.

9.4 Financial planning will support the aspiration to diversify and strengthen income streams through membership growth, donations, legacies, grants, appeals, events where appropriate, corporate support and partnership opportunities. Fundraising plans will identify the purpose, target, cost, timetable and reporting requirements for each significant appeal or campaign.

9.5 Major projects and initiatives will only proceed where there is an agreed project plan, an identified budget, appropriate authority to commit expenditure, clear reporting arrangements and a realistic assessment of risks, dependencies, volunteer and staff capacity, procurement requirements and ongoing revenue implications.

9.6 Financial reporting will enable effective control throughout the year. Trustees will receive timely and meaningful information on actual performance against budget, cash flow, reserves, restricted funds, project expenditure, fundraising performance, outstanding commitments and forward forecasts. Variances outside agreed tolerances will be investigated and corrective action agreed.

9.7 The WSRA will maintain robust financial controls, including documented procedures, appropriate authorisation limits, segregation of duties where practicable, accurate record keeping, fraud prevention measures, regular reconciliation, compliance with regulatory requirements and clear treatment of restricted and designated funds.

9.8 Reserves planning will be reviewed at least annually to ensure that the charity can meet anticipated expenditure, manage income volatility, protect against financial risks and continue to support its charitable objectives during periods of uncertainty or unexpected cost.



**Volunteers preparing 'Odney Manor' for service**

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9.9 Where collaborative working, shared functions or joint planning with WSRHT, DEPG, WSR Plc or other bodies may reduce cost, improve resilience or increase public benefit, the financial implications will be assessed transparently and in line with WSRA's charitable objectives, governance requirements and protection of assets.

9.10 The annual action plan will identify the financial resources required to deliver each priority, the source of those resources, the accountable lead, the expected timetable and the measures by which progress will be monitored. This will allow the Board to review affordability, delivery and risk together rather than treating finance as a separate activity.

## **10 IT Systems and Controls, Website and Digital Presence**

### **10.1 Current Position**

The West Somerset Railway Association (WSRA) has invested significantly in modernising its IT infrastructure in recent years. The Association currently operates a cloud-first environment based on Microsoft 365, providing email, document management, collaboration tools, and SharePoint-based file storage.

Membership and donation management are delivered through Donorfy, which provides a secure and resilient cloud-based platform for managing supporter data, memberships, fundraising campaigns, and financial reporting. Mailchimp is used to manage electronic communications, newsletters, and marketing campaigns to members and supporters.

The Association's office computers are generally between two and three years old and remain fit for purpose. A loan computer is also available to maintain operational continuity should a primary workstation fail.

### **10.2.2 Data Protection and Backup**

The Association holds important membership, donor, financial, and governance records which must remain secure and recoverable.

The WSRA will:

- Continue to utilise secure cloud-based systems including Microsoft 365, Donorfy, and Mailchimp.
- Ensure appropriate backup arrangements exist for Microsoft 365 data and critical organisational records.
- Maintain documented disaster recovery and business continuity procedures.
- Regularly review backup and recovery capabilities.

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### 10.2.3 Business Continuity

The Association's increasing reliance on digital systems requires resilience against equipment failure, connectivity issues, or cyber incidents.

The WSRA will:

- Maintain access to spare equipment where practical.
- Ensure critical data can be accessed remotely when required.
- Review contingency arrangements for broadband connectivity, including the potential deployment of Starlink should existing services become unreliable.
- Minimise single points of failure within operational systems.

### 10.2.4 Infrastructure Renewal

Technology assets require planned replacement to avoid unexpected costs and service disruption.

The WSRA will:

- Establish a rolling replacement programme for office computers.
- Begin budgeting for replacement of current devices within the next two to three years.
- Monitor software licensing requirements and future technology needs.
- Evaluate emerging technologies that may improve efficiency or reduce costs.

### 10.2.5 Website and Digital Presence

The WSRA website remains a key communication and engagement tool, providing information for members, volunteers, donors, supporters and the wider public. It serves as an important platform for promoting the Association's activities, fundraising initiatives, membership benefits and heritage objectives.

The current website continues to fulfil its primary functions and remains operational. However, over time it has evolved through a series of incremental updates and enhancements which, whilst effective in maintaining functionality, have increased the complexity of ongoing maintenance and development.

During the period of this Corporate Plan, the Association will undertake a review of its digital presence to ensure it continues to meet the needs of members, volunteers and supporters. This review will consider usability, accessibility, security, mobile device compatibility, content management, integration with other systems and the overall user experience.

Whilst a complete redevelopment of the website is considered desirable in the medium term, it is recognised that other organisational priorities may require greater attention and investment in the short term. Consequently, the focus over the early years of this plan will be on maintaining a stable, secure and functional platform whilst identifying requirements, costs and opportunities for future redevelopment.

The long-term objective is to deliver a modern, resilient and user-friendly website that supports membership growth, volunteer recruitment, fundraising activities, communication with stakeholders and the wider strategic aims of the Association.

### **10.3 Governance and Support**

As the Association becomes increasingly dependent on technology, IT knowledge and responsibility should not rest with a single individual.

The WSRA will:

- Document key IT systems, processes, and administrative procedures.
- Develop succession planning for IT administration.
- Consider establishing a small volunteer IT support team or external support arrangement to reduce dependency on individual trustees.
- Ensure adequate oversight of technology risks through regular reporting to the Board.

### **10.4 Future Vision**

Over the life of this Corporate Plan, the WSRA will continue to develop a secure, resilient, and cost-effective digital environment that supports members, volunteers, trustees, and staff. Investment in cyber security, cloud services, backup arrangements, and planned equipment replacement will help ensure the Association's systems remain reliable and capable of supporting the organisation's long-term objectives



**DEPG Hymek D7017 approaching Doniford Station. One of the challenges facing the Railway is coastal erosion at Helwell Bay along this stretch of the line.**

## **11 Risk Management**

This is a summary of the key risks the WSRA faces. We have created and will review at least annually a comprehensive risk register, which adds detail to this summary and is available on our website for members to inspect. We have, as can be seen from the Risk Register, already made considerable steps to manage and mitigate a number of the risks we have identified. Risk appetite will be determined by the Board and reviewed annually

### **11.1 Risk Register Overview**

The risk register highlights severe structural, financial, and operational vulnerabilities that threaten the long-term sustainability of the WSRA. Primarily, governance risks were driven by a critical shortage of skilled Trustees, which led to a lack of succession planning and forced the current Board into immediate "firefighting" roles rather than providing independent, strategic oversight. Financially, the Association faces high income volatility alongside an immense, expanding repairs backlog for locomotives and carriages that historically runs over budget and behind schedule. These pressures were further compounded by severe compliance gaps—specifically outdated safeguarding, health and safety, and GDPR frameworks—and an aging volunteer workforce operating on vulnerable, legacy IT infrastructure.

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**11.2 Strategic Governance and Financial Remediations**

To counter these systemic vulnerabilities, the Board is transitioning from short-term crisis management to structured, long-term stabilisation. Governance structures are being reinforced through targeted Trustee/Advisor recruitment campaigns designed to fill critical skill gaps, establish robust succession planning, and cleanly separate strategic oversight from executive functions. Financially, the WSRA is actively developing a comprehensive three-year business plan and corporate strategy to stabilise income streams and diversify audiences. Concurrently, a formalised project management and technical review framework is being implemented for locomotive and carriage overhauls to curb budget overruns, while specialized legal and accounting advisors are engaged to definitively resolve the outstanding legacy VAT issue and ensure appropriate insurance coverage.

**11.3 Compliance, Operational, and Community Engagement Actions**

Operationally, immediate priority is being given to updating and modernising all regulatory policies—specifically safeguarding, health and safety, and data protection—to align fully with current statutory requirements and Charity Commission expectations. Digital vulnerability is being systematically addressed by upgrading legacy IT networks, and we have drafted a comprehensive Business Continuity Plan to build operational resilience. Finally, to secure the future volunteer and visitor base, the Association is rebuilding its external relationships with the partner heritage groups and the WSR Plc. This is paired with a modernised marketing and social media strategy targeted at reversing membership decline, improving public relations, and actively engaging younger, more diverse audiences.



**An evening photography event at Minehead Station**



## **12 Performance Measures and Evaluation**

The Key Performance Indicators (KPIs) below will be used to monitor our progress, measure our success, and ensure our accountability. The targets are SMART: **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**ime-bound

Major targets for the period (2026-2031) are to:

1. Complete the restoration of locomotives 4561 & 80064 to achieve their readiness for operation in 2028 if not earlier.
2. Deliver a strategy for the restoration of the WSR Carriage fleet within 3 months; and implement that strategy by funding the complete restoration of at least one carriage per year.
3. Support by the end of 2026 a feasibility study into delivering secure, purpose-built carriage shed(s) or other cover for carriages, on WSRA, HT, WSR PLC or adjoining land
4. Increase the annual amount of grant funding, donations and other income to meet our year-on-year plan requirements.
5. Reinstitute a series of at least one Event in 2026 and three in 2027, leading to the potential reintroduction of a Steam Rally in some form in 2028.
6. Implement an improved communications strategy to:
  - a. Boost total website traffic by 15% year-on-year by launching a new Trustee-driven blog series.
  - b. Increase local media coverage of the WSRA by 30% by issuing monthly press releases and offering exclusive interviews to 3 key regional outlets over the next 6 months.
  - c. Improve communications with potential volunteers to achieve increased volunteer recruitment and retention in key areas by showing the value of their time and skills.
  - d. Improve engagement with local stakeholders for partnership, sponsorship, or support with local events.
  - e. Improve communications with potential members to achieve increased member numbers.
  - f. Increase membership growth by 10% year on year.

### 13 Annual Action Plans Linked to this Corporate/Strategic Plan

In support of this Corporate Plan, the WSRA will prepare and maintain annual action plans which translate the strategic objectives in this document into practical, funded and accountable work programmes. Each annual action plan will draw together the actions identified across the plan, including financial sustainability, restoration and carriage strategy, membership growth, education and heritage activity, events, communications, IT systems, governance, risk management, safeguarding, health and safety, data protection and stakeholder collaboration. We will:

- a. Set out the specific actions, owners, resources, funding assumptions, timescales and success measures needed to deliver the priorities in this plan, including restoration projects, carriage strategy, membership development, communications, events, education, IT improvements and governance controls.
- b. Link each action plan to the annual budget, three-year financial plan, reserves policy, Risk Register and project plans so that affordability, risk, capacity and delivery are considered together before commitments are made.
- c. Monitor progress through regular Board reporting, agreed performance measures and review of variances, enabling Trustees to take corrective action where delivery, income, expenditure, compliance, stakeholder or reputational risks move outside agreed tolerances.
- d. Communicate progress, priorities and changes clearly to members, volunteers, staff, partners and other stakeholders, using feedback and lessons learned from each year to update future action plans and inform the formal review of this Corporate Plan every three to five years.



**WSR Fleet loco 9351 at Crowcombe Heathfield Station**

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## 14 SWOT Analysis

This SWOT analysis summarises the main internal and external factors affecting delivery of the Corporate Plan and links the external analysis, Risk Register, annual action plans and performance measures.

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| <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Clear charitable purpose centred on education in the heritage of the Railway from Taunton to Minehead.</li> <li>• Significant heritage assets, including locomotives, carriages, wagons, artefacts, records and associated railway heritage.</li> <li>• Established role in restoration, preservation, heritage interpretation, volunteering, education, fundraising and community engagement.</li> <li>• Committed membership, donor and volunteer base providing advocacy, practical support, fundraising and continuity.</li> <li>• Strengthening governance arrangements, clearer Trustee and Advisor roles, succession planning, policies and Risk Register oversight.</li> <li>• Improving financial planning framework, including annual budgets, three-year planning, reserves management and project controls.</li> <li>• Developing partnerships with WSRHT, DEPG, WSR Plc, funders, local communities, education bodies and tourism stakeholders.</li> <li>• Modernising IT, membership and communications systems through Microsoft 365, Donorfy, Mailchimp and planned website improvements.</li> <li>• Recognition of the railway corridor as both a heritage asset and a living ecological landscape with educational value.</li> </ul> | <p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Heavy reliance on Trustees, volunteers and a small staff team to deliver a broad and ambitious programme.</li> <li>• Legacy governance, safeguarding, health and safety, data protection and IT issues still require ongoing review and embedding.</li> <li>• Ageing locomotives, carriages and other assets require costly specialist restoration, maintenance and weather protection.</li> <li>• Historic dependence on major fundraising events, especially the Steam Rally, creates income volatility and planning uncertainty.</li> <li>• Membership, website, data insight, supporter journeys and digital engagement need further modernisation.</li> <li>• Specialist skills, succession planning and operational capacity gaps may constrain restoration, IT, fundraising and events delivery.</li> <li>• Some major projects remain dependent on funding, permissions, environmental assessment, volunteer capacity and partner alignment.</li> <li>• Coordination across the wider railway family can be complex where priorities, governance requirements and resources differ.</li> <li>• Limited internal capacity may make it harder to respond quickly to regulatory, environmental, tourism and community expectations.</li> </ul>                                                                                                                                                                                                                                                                            |
| <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Grow and diversify membership through tiered, digital, youth, corporate and experience-led offers.</li> <li>• Increase income through donations, legacies, grants, appeals, corporate support and clearer project impact reporting.</li> <li>• Expand education, outreach, apprenticeships, work placements, youth engagement and partnerships with schools and colleges.</li> <li>• Strengthen collaboration with WSRHT, DEPG, WSR Plc and others through shared planning, aligned policies and joint projects.</li> <li>• Use restoration progress, carriage strategy, station walks, exhibitions and open days to raise visibility and public support.</li> <li>• Reposition events as safer, railway-based, collaborative and education-led activities supporting community engagement and tourism.</li> <li>• Improve website, CRM, member portal, data insight and supporter journeys to strengthen communication and retention.</li> <li>• Promote biodiversity, habitat enhancement, station gardens, tree planting and environmental education along the railway corridor.</li> <li>• Strengthen funding bids by evidencing public benefit, inclusion, accessibility, sustainability, governance and long-term legacy.</li> </ul>         | <p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Rising costs for restoration, maintenance, compliance, staffing, events, insurance, IT, utilities, materials and professional advice.</li> <li>• Competition for grants, donations, volunteers, public attention and specialist skills across the heritage and charity sectors.</li> <li>• Further deterioration of locomotives, carriages and other assets if restoration, covered storage and maintenance are delayed.</li> <li>• Failure to recruit and retain enough Trustees, volunteers, staff and specialist advisors to sustain delivery.</li> <li>• Cyber, data protection or business continuity incidents affecting member data, donor confidence, operations and reputation.</li> <li>• Reputational risk from poor communication, stakeholder tension, governance failure, unsafe events or unmanaged environmental concerns.</li> <li>• Income volatility from event changes, supporter cost pressures, grant uncertainty and reliance on external funding.</li> <li>• Economic, regulatory, planning and environmental pressures delaying projects or increasing delivery costs.</li> <li>• Public concern about steam railway impacts, including coal supply, emissions, smoke, ash, water use and lineside fire risk.</li> <li>• Climate change and severe weather affecting habitats, drainage, embankments, buildings, events, stored stock and volunteers.</li> <li>• Partner capacity, local authority requirements or railway-family alignment issues delaying shared projects and funding bids.</li> </ul> |

## 15 Conclusion

This Corporate Plan sets out a practical and ambitious programme for the West Somerset Railway Association over the period 2026–2031. Its central purpose is to ensure that the WSRA remains a stable, effective and respected charity, able to promote education in the heritage of the Railway from Taunton to Minehead while safeguarding the Association’s assets, strengthening public benefit and contributing positively to the Railway, its communities and the wider heritage sector.

The plan recognises that the WSRA’s future success depends on delivering tangible heritage outcomes. This includes completing the restoration of locomotives 4561 and 80064, developing realistic plans for Ditchat Manor, implementing a carriage-by-carriage restoration strategy, progressing the case for covered carriage storage, preserving artefacts and records, and expanding the interpretation of the Railway’s industrial, cultural, social and ecological heritage for members, volunteers, visitors and future generations.

It also acknowledges the challenging external environment in which the Association operates. Rising costs, ageing assets, funding competition, volunteer capacity, regulatory expectations, cyber and data risks, climate resilience, planning requirements, public accountability and the environmental implications of steam railway heritage all affect our ability to plan and deliver. The WSRA will respond to these pressures through disciplined financial planning, diversified income, robust reserves, project controls, a comprehensive Risk Register, strong governance, transparent decision making and regular performance review.

Delivery will require sustained engagement with members, volunteers, staff, Trustees, Advisors, WSRHT, DEPG, WSR Plc, funders, local communities, education providers, local authorities, tourism bodies, environmental stakeholders and the wider heritage railway community. The plan therefore places strong emphasis on membership growth, volunteer recruitment and retention, education and outreach, safer and more collaborative events, clear communications, responsible environmental stewardship, digital resilience and policies that support safeguarding, health and safety, data protection, conflicts management and sound financial control.

The annual action plans, annual budget, rolling three-year financial plan, performance measures and Board reporting arrangements will turn this strategy into accountable delivery. They will allow the WSRA to assess affordability, capacity, risk and progress together, take corrective action where necessary and keep members and stakeholders informed about priorities, achievements, challenges and lessons learned.

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By implementing this plan with realism, openness and determination, the WSRA can strengthen its financial and organisational resilience, widen its support base, improve collaboration across the Railway family, manage environmental and operational responsibilities responsibly, and make a lasting contribution to the preservation, interpretation and enjoyment of the West Somerset Railway for the public benefit.



**WSR Home Fleet loco 9351 approaches Blue Anchor Station**

## Appendix 1 - WSRA Functional Structure: Strategic responsibilities supporting the Corporate Plan

