

# Business Plan



## Introduction

1. The development of this plan has been led by Martin Pearson, ably assisted by Nick Abbey and directed via a Board Sub-Committee chaired by Jon Tomlinson – and in the last two meetings by Damian Smith. A significant amount of work has been undertaken – in consultation internally and externally – which is reflected in the full plan appended as Annex A. Page numbers below refer to the pages in Annex A. The Board is invited to consider the Sub-Committee’s recommendations as follows:

## Guiding Principles (x6, page 4)

2. These are recommended to help guide our work over the coming years.
- Working in Partnership** – with the “family” and liked minded organisations
  - Teamwork** – joint working across teams. No more lone working
  - Openness** – sharing ideas, consulting with colleagues, completing documentation
  - Sharing the workload** – less reliance on individuals and a more balanced workload
  - A sustainable organisation** – recruitment, refreshment & succession planning
  - Professionalism** – high standards, reliable and respected as a champion & partner

## Priorities (x12, page 6)

3. This is all subject to having the quantity and quality of volunteer time to do the work
- Leeds Settle Carlisle Association** – agree draft constitution, start working together
  - Train Services and increased passenger numbers** – develop engagement strategy with railway organisations; continue work to improve services on the line and adjacent areas; agree methodology and baseline for measuring passenger travel numbers
  - Volunteers** – increase numbers by establishing a discrete recruitment function; recruit volunteers to enable **Horton Café Bar** service to open in 2024
  - Liaison with Statutory bodies, stakeholders and other community groups** – share function across the Board & Team Leaders, based on geographical areas
  - Integrated Transport** – create a team to champion this important part of our strategy
  - Communications** – implement the recommendations in the separate paper
  - Membership** – implement new Board policy agreed including membermojo system
  - Sales** – Maximise revenue from our shops and online sales busines
  - Review Board responsibilities** – particularly H&S, communications, heritage/history
  - Heritage and History** – rationalise management of holiday lets and building use
  - Station Adoption** – implement the agreed new model in two stations per annum
  - Finance** – continue financial enabling and oversight

## Recommendations (x6)

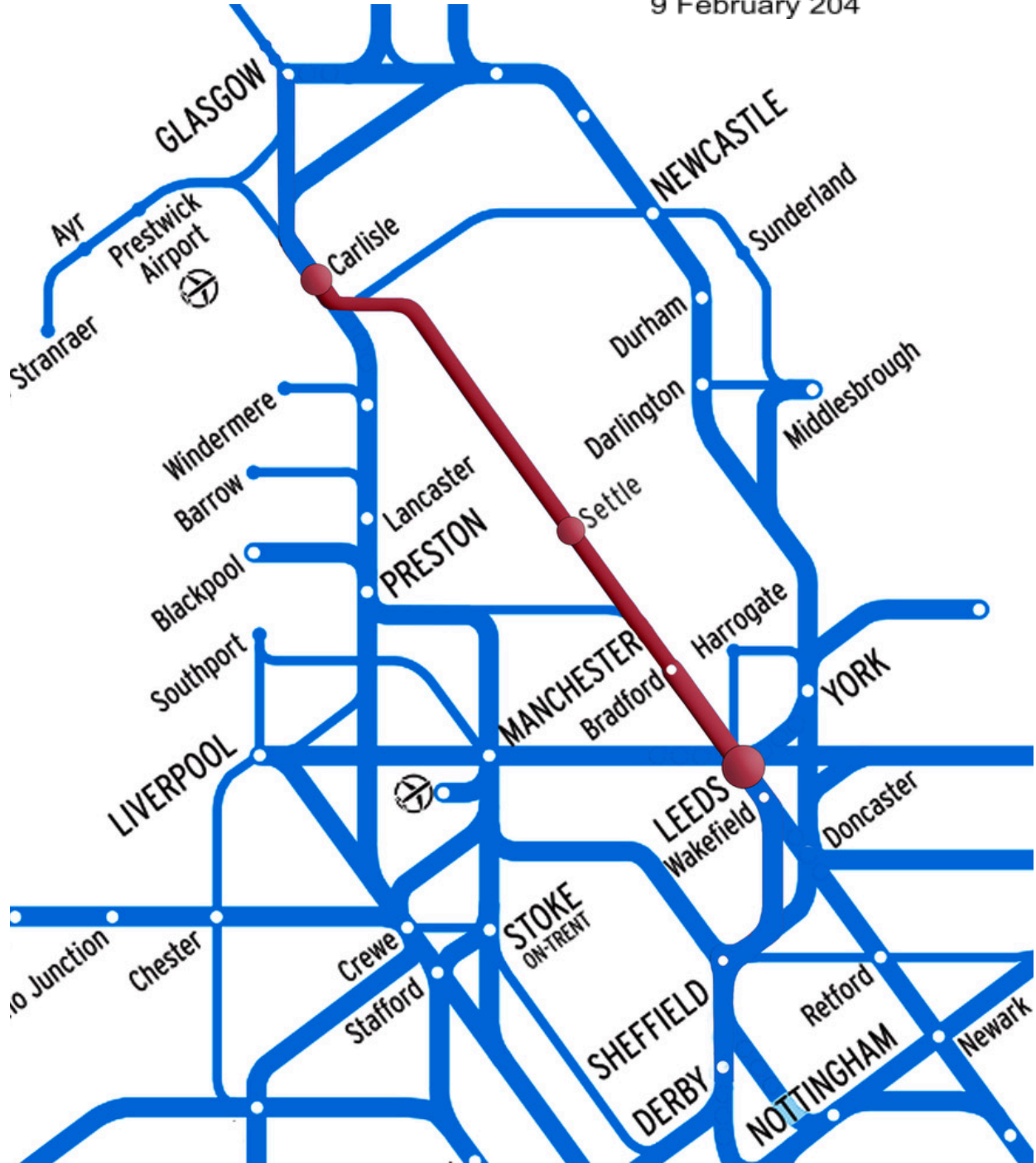
4. These are set out in more detail in Annex A:
- Confirm support for 6 principles including new one of openness
  - Confirm support for 12 priorities
  - Welcome the other ideas in Annex A as basis for a “road map” for 5 years
  - Review continued need for, and operation of two subsidiary companies
  - Establish a small group to plan our contribution to the 150<sup>th</sup> anniversary in 2026
  - Delegate budgets for all volunteer functions to improve governance and efficiency

**Martin Pearson, Damian Smith, Jon Tomlinson, 30 January 2024**

# Friends of the Leeds Settle Carlisle Line

## Business Plan 2024-2029

Annex A to Business Plan report to  
FoSCL Board, 9 February 2024  
9 February 2024



**BLUE LINES:** Northern's depiction of their main routes  
**RED LINE:** The important missing link...Leeds-Settle-Carlisle

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Front Cover Map showing S&C Line in Northern Context

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**The Friends: independent champions of the Leeds-Settle-Carlisle**

*Join our Journey! Share the experience!*

**Paul Kampen, Secretary**  
**David Verity, Assistant Secretary**  
**On behalf of the Board, 10 February 2024**

## Executive Summary

The Friends of the Settle-Carlisle Line (the Friends) Business Plan, approved early in February 2024, sets out our ambitions for the coming years. It is based upon a strategy (p16), and Guiding Principles (p4) agreed by the Board in July 2023.

**Our mission is that the Leeds-Settle-Carlisle line should remain one of the finest railway journeys in the World.**

**Our overriding aim is to work with partners to increase the number of passengers and journeys made every year.**

Of particular importance to this aim is to refer, wherever appropriate, to **Leeds-Settle-Carlisle** line, rather than Settle-Carlisle, as this should raise awareness of the line to a much larger audience, including the large conurbations in West Yorkshire and East Lancashire. Freight is still an important part of the line's viability (p22) and we would like to see a more integrated and sustainable (p8) approach to all transport services that connect with the line.

A series of 12 priorities has been identified (p6) where we believe most impact can be made in achieving our aims. This depends on volunteer resource and expertise, hence an emphasis on expanding the membership (p8), and upon recruiting and retaining volunteers (p6).

The Friends, clearly, are not responsible for the operation and maintenance of the line, but we regard ourselves as "Independent Champions" working with others to support it. Partner organisations are the Settle and Carlisle Railway Trust and the Settle and Carlisle Development Company (p4). Increasingly we are working together, engaging with the various railway bodies to promote our joint objectives around improving both local services and the line's more strategic role within the network.

We aim to introduce a more structured approach to our communications with external stakeholders (including the various Unitary, County, District, Parish and Town councils), based upon geographical divisions of the line and agreed key messages (p7) in line with a new Communications Plan that has been adopted at the same time as the Business Plan.

We recognise that our own governance needs to be robust enough to support our aims (p8), and the onus this places upon the Board to ensure that new smarter ways of working are promoted and communicated internally. We need to use more of our members and volunteers in our wider campaigning work and to support our Team Leaders in their various responsibilities.

The Business Plan sets out specific milestones to be reached in the first year, considers the resources available, and looks ahead to our work in subsequent years, explaining how our aims can be implemented.

Further details are in this annex/

## **Guiding Principles for the Business Plan**

The Business Plan for the first three years contains 12 priorities, with objectives that are challenging, but achievable if we can secure sufficient support from our amazing team of volunteers. It considers the Friends' own needs, and the importance of the line as a local service and as part of the strategic rail network.

This plan has benefited from superb input from a number of members, none of whom have been involved in FoSCL management before. Additionally, discussions were held with each Board Member, and support from the Strategy Board Sub-Group has been crucial.

The purpose of the Business Plan is to help the Board of the Friends to implement the strategy agreed in July 2023 (see page 25). Set out below are detailed plans for years 1, 2 & 3 of the planning cycle, written in line with the following Guiding Principles:

### **a. Working in Partnership**

The strategy says we will work with any willing partner. Conversations have begun within the "Family", being the Settle and Carlisle Railway Trust; the Settle-Carlisle Railway Development Company; the Settle and Carlisle Railway Properties Ltd; and FoSCL or Friends. A key part of this Business Plan will be continuing those conversations to identify areas where there is broad agreement and scope for joint working. Within this Business Plan, the three organisations above (together with Network Rail and Northern) are referred to as the Leeds-Settle-Carlisle Association (LSCA.)

### **b. Teamwork**

We have a history of lone working by dedicated individuals which is now being slowly replaced by better team working. This needs to be baked into the DNA of the organisation.

### **c. Openness**

We need to be transparent with our members, volunteers and associates about our plans. We will be consulting wherever possible, seeking ideas and feeding back on the results of those consultations. We will also improve the way we document decision making and the way we maintain our records of actions taken.

### **d. Sharing the Workload**

We are currently over reliant on a few key individuals who contribute significantly to the ongoing work of the organisation. This is not sustainable in the medium to longer term and needs to be addressed by sharing the workload more evenly and more widely. Good practice from other organisations suggests volunteer welfare is an important part of managing a successful organisation. We believe there is an opportunity to involve more non-Board members in our work and will examine this further.

### **e. A sustainable organisation**

A key area is to ensure the Board and Volunteer Teams have plans in place for ongoing recruitment and refreshment including succession planning for key posts. It is equally important that the Board and Teams are well balanced in terms of age, experience and geographical location.

### **f. Professionalism**

We aim to act and behave “professionally” so our members, partners and stakeholders have a high regard for the work we undertake. We need to build on recent positive developments (e.g. a new code of practice and new policies) to ensure we are regarded as a good place to volunteer.

## **BUSINESS PLAN 2024-2027: Years 1, 2 and 3**

*More detailed commentary on these priorities appears at part 3, appendix 1, "Additional Information".*

### **Priority 1: Leeds, Settle and Carlisle Line Association (the Association/LSCA)**

This is a voluntary association comprising the following organisations:

- The Settle and Carlisle Railway Trust (PropCo)
- The Settle and Carlisle Railway Development Company Ltd (DevCo)
- Friends of the Settle Carlisle Line (Friends)
- Northern Trains Limited (NTL)
- Network Rail (NR)

Its Mission is to support the Leeds Settle Carlisle Line (LSC) by providing a senior level body to oversee marketing and publicity, identification of new projects and voluntary collaboration.

- a) Agree joint working proposals with LSCA partners
- b) Work with the Commercial manager to identify actions
- c) Explore how we will improve marketing of the line

### **Priority 2: Train Services and Increased passenger numbers**

- a) Progress discussions with Railway Organisations Northern, Network Rail, Avanti, DfT, GBR and DfT using an engagement strategy
- b) Support proposals being made for improving neighbouring lines
- c) Explore how to increase passenger numbers from Leeds/Bradford
- d) Ensure more Board members are involved in these matters

The engagement strategy should cover two major issues:

- a) **Local Services**, and
- b) the **Strategic role** that the Leeds-Settle-Carlisle line can play as part of the Rail Network.

The Leeds-Settle-Carlisle Line needs to play both roles, rather than being regarded as some form of heritage line. We have seen the positive impacts achieved elsewhere (e.g. Aire Valley and Bentham Line) from greater engagement with central rail bodies. 2024 and 2025 are opportunities for us to put the S&C firmly onto the agendas of decision makers

### **Priority 3: Volunteers**

The success of the Business Plan and separate Communications Plan in delivering the Friends' strategy depends upon there being sufficient numbers of willing volunteers coming forward to carry through the recommendations. This is true at all levels within the Friends, from the Board across to many of the volunteer teams where Team Leaders have been reporting that they are struggling to replace their people as they become less active over time, or even drop away from volunteering altogether. This suggests that a major priority for the Friends is:

## **To work on recruiting, retaining and developing volunteers to carry out all the recommended tasks for the coming years**

This in turn suggests that the overall leadership of the volunteering function needs to be boosted, perhaps with some Assistant Volunteer Co-ordinators. Their main responsibility would be volunteer recruitment (not management) and their focus would be geographical.

There is one additional project for Year 1, namely the Horton Café Bar (HCB). Here the Friends will recruit a team of volunteers to work at the HCB liaising with the Property Company to agree a launch date and opening hours. In addition The Friends will work in partnership to enhance the HCB proposition.

### **Priority 4: Communities and Councils**

It is recommended that **the Board adopts the approach suggested of organising communications with Councils and local communities around four geographical sectors.**

Forty years ago the campaign to save the line worked closely with Local Communities and also the County Councils. It is an approach we should now follow. This is a big challenge which can only be done if the workload is shared and supported by relevant training. There are at least four major issues:

- Strategic battling for the Leeds-Settle-Carlisle Line
- Integrated and sustainable transport
- Grassroots links with communities via Parish Councils
- Links with other related bodies. (See Appendix 2, stakeholders, part 3)

Within the last three years one Board Member has successfully built up links, primarily focusing on transport hubs. We need to build up relationships with key councils and the elected Mayors of Greater Manchester, South Yorkshire and West Yorkshire. The major councils/authorities are:

- West Yorkshire
- North Yorkshire,
- Westmoreland and Furness,
- Cumberland
- Yorkshire Dales National Park

The Integrated Transport Team (possibly in conjunction with the wider LSCA) should identify one member of their team who would liaise on integrated transport issues.

We could continue our current practice, selecting Priority Groups for contact, and if resources are tight this may be all that can be done. Weaknesses with this approach, however, are that it does not make good use of volunteers in their own locality, puts too much work on a limited number of people and is probably too centralised.

We are, therefore, recommending an alternative: to have one person taking lead responsibility for each of the following areas:



- West Yorkshire
- North Yorkshire inc Yorkshire Dales National Park
- Westmorland and Furness
- Cumberland

**We recommend introducing named individuals (Board and Team Leaders) to manage relationships with key partner organisations. This represents a significant change to current practice and will require discussion**

**Priority 5: Integrated and Sustainable Transport.**

The outline of a team to cover integrated and sustainable transport seems to be emerging and could be consolidated in Year 1. This is not just about buses but all connectivity and de-carbonisation. We will need to think carefully about whether this is just a LSCA operation or one that develops in partnership with YDNPA and Friends of the Dales. **It is recommended** that this be examined and such a team be established

**Priority 6: Communications**

A Communications strategy is being considered by the Board in February 2024, and contains a number of recommendations that are consistent with the Business Plan.

**Journal**

An “advisory group” of three people should be established in year 1, to look at all aspects of the magazine, including content, frequency, online editions etc, and that we should aim for there to be a new editor ready to take up their post as soon as possible and no later than the 150 years anniversary in 2026.

**Priority 7: Membership**

In 2023 the Board agreed a series of recommendations in a report prepared by the Membership Secretary and Treasurer. It covered: Membership categories, Membership Subscriptions, Member recruitment, Methods of Payment, Membership Administration, Other considerations. The annual membership fee will rise to £20 from March 2024. The priorities will be: implementation of the new membership system, and to negotiate the relationship with DevCo for administration of membership; securing an e-mail address for new members; targeting the recruitment of young people and corporate members

**The Board will receive quarterly reports on progress.**

**Priority 8: Sales Team**

We need to ascertain early on whether work is done under the auspices of the LSCA or whether we stand alone. A major priority is to increase the number of volunteers in order to maintain a regular presence in the shops at Appleby and especially Settle.

**It is recommended that the Treasurer, Sales Director and Volunteers Director consider how best to take this forward.**

**Priority 9: Strengthening the Board**

A number of specific roles which are currently recognised as Board responsibilities, could be assigned to appropriately skilled volunteers who may, or may not, be full Board

members. These roles could cover communications, budgeting, heritage, training, safeguarding, schools (working with DevCo) and Universities (primarily over recruitment to Friends) and possibly Human Resources. The Board should set the direction and determine action following consideration of proposals from both Board and non-Board members.

The Board should initially identify contingency steps in the event of non-availability of key members of the team. This will lead to a process to cover **succession planning**.

**A Director should assume overall responsibility for Health and Safety (Year 1). The Board should consider a paper outlining work for the coming years.**

The Board is fortunate in having a member with experience of working within a Train Operating Company. **We should seek opportunities to recruit a member with senior Network Rail experience.**

**During years 1&2 we should consider the continued need for the two subsidiary Companies, commission a review of the Articles to go to the AGM in 2025, form a 'Stewardship' group, and start work on delegated budgets, most of which should go live from March 2025.**

### **Teamwork**

FoSCL has in the past tended towards lone working by individuals rather than coordinated activities. Although colleagues have worked tirelessly at times, this is a way of working from which we should move away, emphasising to all colleagues that team working is very often necessary for achieving our goals. It is unrealistic to seek to achieve this in one year alone, but Business Plans for future years should list where this has been achieved.

We recognise that this may require some dedicated training, and we may appoint a Training Officer to assist with the task, working within a defined budget.

We would expect the Board members in year one to commit themselves to at least four hours each year for training purposes. The officers will suggest to Board members areas to explore.

**It is recommended that the Board receives reports at six monthly intervals on the progress being made.**

### **Priority 10: Heritage and History-Derby Gothic and Dent Station-Holiday Let**

Although not a heritage railway line as such, the quite wonderful Derby- Gothic style of architecture provides a unique attraction for visitors.

We expect that LSCA partners will look at property ownership and improvements, Dent Station (owned by Friends), signal boxes and station facilities (looking with Northern and Network Rail at standards for service provision at different types of stations).

We should jointly explore opportunities for single marketing and management of all the holiday lets. There are significant issues for us in providing a team to support and in time relieve the current Board Member in their work at Dent.

The Friends have asked the Journal Editor to write the history of FoSCL.

**We must agree arrangements with the Trust on access to and responsibility for the Archive.**

The **Settle-Carlisle Railway Conservation Area (SCRCA)** Project is independent of Friends, although it does receive some benefits from affiliation. It was set up in 2012 to identify, catalogue and create a comprehensive record of railway-related sites.

**We should prepare for the 150<sup>th</sup> anniversary, in 2026, of the line being open for passengers.**

### **Priority 11: Station Adoption**

Ideally, as well as looking after the upkeep of stations, we work with local communities to see what they could use the station for and to foster a sense of ownership and pride in their station. An objective for year 1 is to begin to increase the number of local volunteers, rather than have people travelling many miles. In reality, it is going to take several years to provide a consistent adoption service for stations between Settle and Carlisle, and an initial target of dealing substantially with two stations each year seems realistic.

### **Priority 12: Financial Services**

**Underpinning all our activities is sound financial management.**

The Finance Director will be involved in the following areas:

- Core Treasurer role
- Membership (Implementation of the proposals for membership in the report considered by the Board in July 2023)
- Electronic Point of Sale {EPOS}
- Fundraising opportunities (including potential for donations and explore the possibility of gaining grants)
- Data Protection Officer  
IT responsibilities (with Webmaster)  
Chair of Midland Railway Company

## **Business Plan Measurements Year 1 Activity, Time and Costs**

### **1. LSCA**

#### **Activity**

- Commercial Manager to be appointed and inducted into post
- Work programme for Year 1 agreed
- Board Members and others involved in LSCA

#### **Time**

Friends representatives could be heavily involved in LSCA work. If activities on joint merchandising take place there will be significant input in creating a system. Depending on who does what the overall time should be as per now

#### **Costs**

We have agreed to a recurring outlay of about £8,000 per annum.

### **2. Railway Organisations**

#### **Activity**

Board decides which Directors take lead  
Adoption of engagement strategy  
New team interface with DevCo and Northern  
GBR interface very early  
TfN interface during 2024

#### **Time**

In year 1 there may be increased time from volunteers. Priority will determine whether this is a reallocation of resources.

#### **Costs**

**If travel to GBR in Derby or London is needed**

### **3. Volunteers**

#### **Activity**

Volunteer Task Force  
HCB opens  
Support for Volunteer Director

### **4. Communities and Councils**

#### **Activity**

Agreeing which Board Directors lead on this  
Finding Team Leaders and Teams for 2/3 sectors

### **5. Integrated Transport**

#### **Activity**

Decide on role and Membership of Integrated Transport Team  
Agree relationship with LSCA and wider Family.  
To produce a 2 year programme of work and request a budget

#### **Time**

The time currently used might be shared between the wider Family. If co-operation with the wider Family is agreed it is possible we could delegate lead work to others.

## **6 Communication**

### **Activity**

A Communications strategy is being considered by the Board in February 2024. This includes recommendations for:

- Adopting key messages for Friends
- Establishing who in the Friends Board will be overall responsible for Communications
- How to communicate effectively with internal and external audiences
- Adopting a House Style Guide to aid consistency in communication
- Modified logo

### **Costs**

Resources will need to be allocated via the business plan to support development and implementation of this strategy.

## **Journal**

An “advisory group” of three people should be established in year 1, to look at all aspects of the magazine, including content, frequency, online editions etc, and that we should aim for there to be a new editor ready to take up their post as soon as possible and no later than the 150 year anniversary in 2026.

## **IT and Website**

### **Activity**

**Review by the Treasurer and Webmaster reports on what is needed**

## **Social Media**

The Communications strategy referred to above recommends that Friends decides whether to join forces with other “family” members to operate a social media presence. Since Friends already has people doing this for Facebook and X, no additional costs are anticipated.

**Time 3 hours a week**

### **Costs**

£2,500 estimated

## **7 Membership**

### **Activity**

- Comms
- Administration
- Marketing

### **Time**

**8 hours a week plus DevCo**

### **Costs**

**£20k including Journal plus DevCo**

## **8 Sales Team**

### **Activity**

- Recruit volunteers at Settle
- Recruit volunteers at Appleby
- Electronic Point of Sale
- Introduce EPOS
- Reduce stock lines
- Involvement in plans to dispose of Unit 8a
- Improve mail order and website

## **9 Strengthening the Board**

### **Activity**

- Stewardship group
- Budgets
- Health and Safety
- Emergency Cover
- Succession Planning
- Articles of Association
- Board Appointments

## **10 Heritage and History**

### **Activity**

Dent, continuing the work recorded in the January 2024 publication by FoSCL and John Carey "Dent Station – A Conservation Project"

- Heritage Plan with LSCA
- A FoSCL History
- Support LSCA
- Flag up with LSCA early on Anniversary 150 years in 2026

## **11 Station Adoption**

### **Activity**

- Roll out the "full model" to a minimum of two stations per year

## **12 Financial Services**

### **Activity**

- Banking
- Bookkeeping
- Reporting

### **Time**

6 hours a week, plus bookkeeping

### **Costs**

£700 Bank Charges £6,750 bookkeeping

## Risks and Mitigation

No.	Risk	Mitigation
1	Key team members – Board, Team Leaders etc. are unavailable temporarily or permanently	<p>An analysis needs to be undertaken to see which posts this would particularly apply. Not all would carry the same degree of importance if the person were absent.</p> <p>Arrangements should be put in place to train replacements who would be able to take over in the short term. Longer term there should be a regular dialogue to identify when long term replacements are going to be necessary and plans for recruitment put in hand.</p>
2	Friends does not have the money available to fulfill its plans	<p>The Board can use its powers to co-opt people for short periods; this may appeal to those unable to commit for longer periods.</p> <p>There should be proper financial control over income and expenditure with budget holders identified and held accountable for spending within their area of control.</p> <p>A growth in membership will generate additional income, and Friends could Fundraise for specific projects</p>
3	Other bodies identified as being partners do not want to co-operate.	<p>New revenue streams identified</p> <p>Relationships should be kept under review, and if necessary be escalated within Friends so that discussions take place between the organisations at a higher level.</p> <p>In the event that no co-operation is still the result, Friends could wait for a change in key personnel and try again.</p>
4	Northern withdraw rail passes	<p>Passes, and letters of authority, are a key benefit for volunteers and thus an enabler of volunteering. We should negotiate with Northern to retain these where possible, perhaps offering to accept more limited passes relating purely to the Leeds-Settle-Carlisle line rather than to the wider Northern area.</p>
5	Changes in political environment, inc General Election	<p>Friends needs to react swiftly to all changes and be in touch with new Councillors/MPs/members/officers asap</p>
6	Failure to attract sufficient members and volunteers	<p>Recruitment drive</p> <p>Greater contact with members to identify volunteers</p> <p>Greater range of opportunities for volunteers, eg presentation skills and administration rather than “hands on”</p>

- 7      Personality Clashes      New guiding principles of teamwork and high standards whereby everyone is professional in their approach
  
- 8      Insufficient buy-in from volunteers      Team Leaders creating a vision and selling the priorities. The Board should be approachable and should listen to address concerns and to win hearts and minds



## **Strategy**



### **Friends of the Leeds-Settle-Carlisle Line**

#### **Our Strategy, adopted July 2023**

**Mission: The Leeds-Settle-Carlisle line should remain one of the finest railway journeys in the World**

**Main Aim: To work with partners to increase the number of passengers and journeys made every year**

#### **Supporting Aims:**

1. Retain, improve and develop rail services between Leeds and Carlisle
2. Improve station facilities, support refurbishment and development of heritage properties
3. Encourage communities to adopt their local stations through active local input
4. Support and develop bus, cycling and walking routes to improve integrated transport
5. Promote preservation & restoration of structures and buildings in the Conservation Area
6. Encourage freight use and diversionary route designation between London & Scotland
7. Support extension of train services south of Leeds and north of Carlisle
8. Equip FoSCL with the skills, knowledge and capacity to pursue this strategy
9. Be **the independent champion** for the line with a large, active and knowledgeable membership

#### **Method: We will do this by:**

1. Collaborating with any willing partner to advance shared aims and advance this strategy
2. Allocating resources, preferably alongside partners, to further our aims
3. Supporting existing ideas for securing & developing the line new proposals as they arise
4. Improving the management, robustness and resilience of existing volunteer led services and by creating new ones where opportunities arise including partnership with like-minded organisations
5. Improving the resilience of FoSCL through recruitment, training and succession planning
6. Monitoring all developments associated with local rail services for possible threats – particularly service reductions, station closures, connecting services or partial line closure. We will campaign vigorously against adverse proposals utilising our resources, members, supporters and partners

#### **Our Priorities for the Line:**

1. Increased passenger numbers year on year - particularly from large urban areas
2. Reliable train services with a more passenger friendly timetable for locals and visitors
3. Integrated transport hubs with affordable, reliable and user-friendly public transport
4. Re-purposed heritage estate for more station-based services for locals and visitors
5. More emphasis on the **Leeds connection** by consistent use of the “**Leeds-Settle-Carlisle**” line. Ant persuading partners to do the same
6. Provision of additional volunteer enabled services to enhance local services

## Part 2

### History of the Settle and Carlisle Railway Line

The Settle-Carlisle Railway opened to passengers in 1876. Built by Midland Railway, it was conceived as a third fast route between London and Glasgow and Edinburgh. Although it survived Dr Beeching's cuts, by 1970, 12 local stations had been closed and many services withdrawn, such that by 1980 the only service between Leeds and Carlisle stopped twice a day at Settle and Appleby

The Settle-Carlisle Railway is unique among British Railway lines as its Victorian architecture remains complete and intact. The line has a rich legacy of historical fact and folklore and includes a wide range of original buildings. In 1991 the importance of this heritage was reflected in the designation of a conservation area throughout the 78 mile length of the line from Carlisle to Hellifield. This is the only railway line in Great Britain to be accorded this status.

The line also serves many communities in this remote part of England. Three market towns of Settle, Kirkby Stephen and Appleby are served directly by train, but for a wide area of North Yorkshire and Cumbria these lines act as a rail head.

The very fact that the Midland Railway Derby Gothic architecture remains complete and intact is due in no small part to the efforts made by many individuals and organisations, not least those from within the Settle-Carlisle Railway Family. The support from British Rail, Railtrack and Network Rail along with that of the train operating companies is acknowledged, as is the massive contribution made by the Railway Heritage Trust.

#### 2. Campaigning

During 1981 noises started to emerge of BR concerns about the structures on the line. In April 1981 an article in Steam World said that Ribbleshead Viaduct needed replacing. Internally BR were predicting closure by 1984. In March 1982 MPs were told in confidence that the line was to close.

Against this background a fight back began. This had started earlier with the Ramblers Association and was taken up by the Yorkshire dales National Park and DalesRail. In the early 1980s, Friends of the Settle Carlisle Association, the Railway Development Society (later Railfuture) and Transport 2000 had formed a Joint Action Committee as a campaigning umbrella. In December 1983 the Joint County Councils also launched a campaign. A few years later, the Settle-Carlisle Business Liaison Group was formed; its strength was in Parliamentary lobbying.

Very early on FoSCL organised teams of volunteers to travel on the busy 12 coach trains that were operating, to get signatures opposing closure to hand on to the Transport Users Consultative Committee. A typical day would be Leeds-Appleby-Skipton- Carnforth- Lancaster- Shap- Carlisle, then Settle to Leeds.

#### At the time of reprieve – April 1989

In late 1983 BR announced the appointment of Ron Cotton as Project Manager to close the line. By the time of his retirement just over 3 years later revenue had quadrupled, eight stations had been re-opened and five trains a day ran in both directions.

Suffice to say that on April 11<sup>th</sup> 1989, the Secretary of State for Transport, The Rt. Hon. Paul Channon, announced to Parliament that the line would not close and called on all parties to work together so that the case for closure would not re-emerge.

### **3 The Friends of the Settle Carlisle line (FoSCL)**

The Friends of the Settle Carlisle line (FoSCL) was formed in 1981 to campaign against the proposal from BR to close the Settle-Carlisle Railway Line. Following the reprieve in 1989, and since 1990, FoSCL has become a Rail User and Support Group.

Our energies are focused on promoting the line, on increasing passenger usage of the line and contributing to the upkeep and maintenance of the Settle-Carlisle Line's unique heritage. Substantial financial contributions have been made to the Station Master House at Ribbleshead and to Dent Station Cottages.

There are unique things that we can do that others might be able to emulate – but not on the scale or cost that FoSCL does. Our strengths lie in our Membership and in the quality of our Volunteers, including those serving on the FoSCL Board. Our membership consists of many different people with different skill sets; all are involved because of their love of the line. They appreciate the work we do and leave us legacies that have filled a void since the financial crash in 2008. All our activities are geared either to increasing passenger revenue – or to reducing costs for the TOC. Our very existence makes others hesitate about any proposal to close the line.

As a railway support group, we also act as **a campaigning group, a projects organisation, a fundraising body, a communication and influencing Group,**

### **5 Finance**

The Friends take forward a healthy financial position with cash at bank of c£210k plus available funds of c£24k in the associate business of The Settle-Carlisle Railway Company Limited (SCRC) that manages the iconic Dent Station Cottage, at the highest mainline station in England.

Assets amount to £600k+, made up of cash balances plus Dent Station Cottage, with a book value of £375k.

The Friends seek to manage their finances in a professional and effective manner underpinned with appropriate governance to manage funds on behalf of our members. We will continue to direct surplus income to strategic objectives with funding requests submitted and agreed at Board level.

A summary of managing our income and expenditure is detailed below (page 28) and is supported by an addendum forecasting our financial performance in the period to 2027/28 with the opportunity for increased funds available to achieve our strategic objectives. Much of our income comes from our members, of which there are currently around 2600

### **6 Incorporation**

For 40 years we were an unincorporated body. This changed early in 2023 when we became incorporated, and we are now under the regulation of Companies House. Within 7 months we had produced our new Strategy, and this five-year Business Plan was adopted by the Board in February 2024.

Included in the 2023 Strategy is that the group should be known as the Friends, and the line, wherever appropriate, as Leeds-Settle-Carlisle.

## External Relationships and Partnerships

### 1 Introduction

The Friends' "main aim" is *to work with partners to increase the number of passengers and journeys made each year*. One of its methods for doing this is: *collaborating with any willing partner to advance shared aims...*

Thus, relationships that The Friends has with other bodies, whether that is the Leeds Settle Carlisle Association (LSCA), the Railway Industry or with Councils and Communities are crucial to achieving our Strategy Aims.

Each of these is considered in turn.

### 2 Leeds Settle and Carlisle Line Association (the Association/LSCA)

This is a voluntary association comprising the following organisations:

- The Settle and Carlisle Railway Trust (PropCo)
- The Settle and Carlisle Railway Development Company Ltd (DevCo)
- Friends of the Settle Carlisle Line (Friends)
- Northern Trains Limited (NTL)
- Network Rail (NR)

Its Mission is to support the Leeds Settle Carlisle Line (LSC) by providing a senior level body to oversee marketing and publicity, identification of new projects and voluntary collaboration

The objectives of the Association are very close to those of the Friends. Wherever possible, tasks undertaken through the Association will be collaborative and involve:

- a) people from more than one partner.
- b) use of volunteers working alongside paid staff
- c) co-location to facilitate good communications and save resources

The three principal bodies have all contributed funds to appoint a Commercial Manager, whose time will be divided between the three. The Friends' representatives on the governing body are the Chair and Vice-Chair, suggesting that both will need to delegate some of their responsibilities to others in the Friends' Board, especially if one becomes an officer within the LSCA.

Co-Location could save resources, especially overheads, if the Friends, Dev Co, Northern Trains and The Trust can agree the future of premises such as use of Settle Station, Unit 8a and the Folly.

### 3. Railway Matters (Strategy Main Aim & Aims 1,6,7,8 & Priorities 1,2,5 & Method 6)

#### 3.1 Integrated and Sustainable Transport.

The outline of a team to cover integrated and sustainable transport seems to be emerging and could be consolidated in Year 1. This is not just about buses but all connectivity and de-carbonisation. We will need to think carefully about whether this is just a LSCA operation or one that develops in partnership with YDNPA and Friends of the Dales. **It is recommended** that this be examined and such a team be established (Year 1)

### 3.2 Engagement Strategy with railway organisations

This should cover two major issues:

- a) **Local Services**, and
- b) the **Strategic role** that the Leeds-Settle-Carlisle line can play as part of the Rail Network.

The Leeds-Settle-Carlisle Line needs to play both roles, rather than being regarded as some form of heritage line. We have seen the positive impacts achieved elsewhere (e.g. Aire Valley and Bentham Line) from greater engagement with central rail bodies. 2024 and 2025 are opportunities for us to put the S&C firmly onto the agendas of decision makers. We will step up our engagement with the various players as set out below.

### 3.3 Key Message

The Friends' position is that we are fully supportive of whatever will help **the continued existence of the line**

The Supporting Aims from our Strategy Paper are set out below and will guide our engagement:

- Retain, improve and develop rail services between Leeds and Carlisle
- Support and develop bus, cycling and walking routes to improve integrated transport in the area
- Encourage freight use and diversionary route designation between London & Scotland
- Support extension of train services south of Leeds and north of Carlisle
- Be an **independent champion** for the line with a large, active and knowledgeable membership

### 3.4 Local Services

It will be necessary for the LSCA to step up our engagement with senior management with Northern, as the Train Operating Company, and Network Rail, particularly their North West and Central Route.

#### 3.4.1 Northern Trains

Now that the result of the ticket office closure debate is known, we should be signalling that we want a close working relationship with Northern, perhaps as a critical friend. We should try to improve capacity available in the summer season and work together to grow passenger numbers.

**3.4.2 Network Rail** We are in discussions with Network Rail about the use of their data, and our own monitoring of services. This needs to be a collaborative exercise. Currently 21 hours per month of volunteer time are used.

**3.4.3 Avanti Trains** We should establish a link with Avanti Trains as both Avanti and Northern use Carlisle station.

### 3.5 Strategic role of the L, S and C line

Our members expect us to act as **INDEPENDENT CHAMPIONS** of the line. We will need to explore this role further in detail with the LSCA and with the national rail network.

### **3.5.1 Network Rail and Department for Transport**

The Friends will continue to support the case for upgrading the Settle – Carlisle line both in terms of signalling and electrification. In addition to contacts with Network rail, this suggests that we should seek to engage with contacts within Department for Transport (DfT) too.

**Network Rail** has recently been awarded a new five year contract (from April 2024) and is, in essence, responsible for the steady state operation, maintenance and renewal of the network. This is significant given that it covers the period of the Business Plan. The **DfT** specifies the enhancements required for the network and contracts with Network Rail to deliver them. Network Rail is not funded or remitted to grow the network, unless third party funding comes from either DfT or another party, for example a County Council.

Relationships with Network Rail can start locally with contacts such as the Route Director, Operations Director and Infrastructure Director, along with the Asset Engineer. A complication is that the Leeds- Settle- Carlisle line falls into two separate Network Rail regions, Eastern and North West & Central. We should begin this work in year 1.

### **3.5.2 Great British Railways (GBR)**

The Friends should make contact with the GBR Transition Team while they are still in their “listening mode”. This is a high priority for YEAR1.

### **3.5.3 Enhancements**

The Friends would support the following enhancements:

a) **Traction decarbonisation:** Network Rail’s interim Traction Decarbonisation Network Strategy (TDNS) document was produced in 2020. It has a map of all lines and what methods of traction are proposed for each. We need to find out over the next two years what plans, if any, relate to the S&C.

b) **Line Speed Increase:** We should support proposals to increase the maximum line speed.

c) **Freight** In our view it is inevitable, and desirable, that freight from the E/W Coast Main Line will from time to time have to be diverted over the LSC line. Additionally, we appreciate the absolute importance of freight for the line's future. Existing passenger usage cannot justify the existence of the line without freight. We support the early delivery of the long-awaited Horton re-connection expected in the winter of 2025.

We recognise the significance of 2043 when Ribblesdale quarrying must end under present permissions. Unless other traffic has by then been attracted to use the line **it will be at risk of closure**. The focus for the LSC seems obvious. Freight facilities on the route should be retained even if their existing use ceases as they could be re-purposed for other

commodities, namely: Kirkby Thore (Newbiggin), Ribbleshead Quarry, Horton Quarry and Arcow Quarry CG

**3.5.4 Transport for the North** We should aim to establish a working relationship with Board members at Transport for the North (TfN). In particular, we would like TfN to recognise the LSC line on their maps and acknowledge its strategic importance. (See front cover.)

### **3.6 Related Lines**

**3.6.1 Clitheroe- Hellifield.** Whilst being used by freight regularly, and by charter or special weekend services, a daily passenger service was withdrawn in 1962. The proposal now would link to Hellifield alone at first; stage 2 would enable passengers from Clitheroe to travel to Leeds. **It is recommended that the Friends support the Clitheroe – Hellifield reinstatement.**

**3.6.2 SELRAP (Skipton East Lancs Rail Partnership)** We are aware of the recent encouraging noises made in Government about re-opening the line between Colne and Skipton and will look to support SELRAP in achieving their favoured outcomes.

**3.6.3 Bentham Line** A formal link should be made. The Bentham CRP area extends to Skipton whereas the DevCo CRP extends to Settle Junction.

**3.6.4 YDNPA and other groups** It is recommended that we continue the formal links established with YDNPA over the multi-use Garsdale link to Hawes, and that individuals are nominated to liaise with the East Lancashire Railway Group, the Upper Wensleydale Railway, the Stainmore Railway and the Embsay line.

### **3.7 Access and Inclusion**

We should co-operate with Northern and DevCo in opening access to the line from the cities of Bradford, Carlisle and Leeds. We see this as our best chance to increase passenger numbers significantly and should explore with DfT/Northern/YDNPA to see if **we can persuade a greater proportion of the people who each year visit the Yorkshire 3 Peaks, that it is a better (and greener) option to use the train rather than cars.**

One Board Member has a remit to extend access and inclusion for minority groups, and a positive start has been made with the line achieving Dementia Aware status.

### **3.8 Informal Railway Forum**

**We support ideas for setting up an informal railway forum which looks to improve and enhance our relationships with other railway organisations.** The technology allows dynamic, permanently live ongoing sharing and debates. Whilst most actual meetings can be avoided, twice a year reports should go to the Board.

## **4 Engagement Strategy with Councils and other Stakeholders**



4.1 Forty years ago the campaign to save the line worked closely with Local Communities and also the County Councils. It is an approach we should now follow. This is a big challenge which can only be done if the workload is shared and supported by relevant training. There are at least four major issues:

- Strategic battling for the Leeds- Settle-Carlisle Line
- Integrated and sustainable transport
- Grassroots links with communities via Parish Councils
- Links with other related bodies. (See Appendix 2 in part 3)

4.2 Within the last three years one Board Member has successfully built up links, primarily focusing on transport hubs. We need to build up relationships with key councils and the elected Mayors of Greater Manchester, South Yorkshire and West Yorkshire. The major councils/authorities are:

West Yorkshire, North Yorkshire, Westmorland and Furness, Cumberland and the Yorkshire Dales National Park

The Integrated Transport Team (possibly in conjunction with the wider LSCA) should identify one member of their team who would liaise on integrated transport issues.

We could continue our current practice, selecting Priority Groups for contact, and if resources are tight this may be all that can be done. Weaknesses with this approach, however, are that it does not make good use of volunteers in their own locality, puts too much work on a limited number of people and is probably too centralised.

We are, therefore, recommending an alternative: to divide the line into geographical sectors based upon County boundaries.

**We recommend introducing named individuals (Board and Team Leaders) to manage relationships with key partner organisations. This represents a significant change to current practice and will require discussion**

**It is further recommended that the Board adopts the approach suggested of organising communications with Councils and local communities around four geographical sectors.**

**Appendix 2, in part 3, “Stakeholders”, indicates the range of organisations with which we should develop an interface.**

## Financial Commentary

### A. Income

Income is traditionally generated from: Member subscriptions; Retail sales from leased shops at Appleby and Settle, plus online web sales and mail order; rent from Dent Station Cottage which operates as a holiday let; plus donations and legacies. Our strategy is to protect and grow existing income streams and identify additional income streams to generate funds that can be directed towards our strategic objectives.

### Membership

The Friends have approx 2600 members, including 260 Life Members, 525 Joint and Family, 1815 Individual plus a few from other categories including Junior and Corporate. Income of £25k+ has been falling gradually by 3% a year. This is reflective of an ageing demographic and the fact the pricing of membership subscriptions has not been reviewed for 20 years. Member benefits include supporting the line, volunteering opportunities and receipt of a quarterly magazine with news and updates.

Membership costs have amounted to c.£20k, generating net income of c.£5k. Principal costs relate to the publishing and postage of the quarterly magazine along with membership administration which is outsourced to DevCo.

Following a recent review of the Membership offering, including subscription pricing and administration, the Board has agreed a series of measures that will both increase income, improve efficiency, reduce costs and attract new members. These are documented in the recent review and are summarised as follows:

- Enhanced membership categories to attract younger members and more corporate members
- Revised subscription rates in line with similar organisations that will generate additional income
- Implementation of new membership system to increase efficiencies and reduce costs
- Provide the option for a digital magazine to reflect member needs, including those with visual impairments

In summary, the changes that have been implemented will increase future income to c£48k in 24-25 with the opportunity to reduce costs below £20k, therefore generating an increase in net income from £5k to £28k in the next year.

### Retail Sales

It is anticipated that increased sales in the current year will see an upturn in net profit of £15k+, with an 80/20 split between shop and web/mail order sales. It should be noted that Settle shop generates most footfall with again an 80/20 split compared to Appleby. The entire retail operation is dependent on the availability and goodwill of volunteers.

This last year has seen new leadership bringing positive change with an increase across all sales channels. In particular new sales lines have been received and time has been invested in our online / mail order offerings. Our strategy will continue to increase sales by stocking items that are of interest to our members and visitors, whilst managing stock in an efficient manner. There are plans to support these aims and improve efficiencies with the implementation in Q1 2024 of electronic point of sale technology.

It is acknowledged that there are risks and issues that may impact our growth strategy and these focus on the engagement and availability of volunteers. As a consequence of limited volunteer resource, we have seen periods of reduced opening hours and resultant lower sales. Whilst it remains a risk, this is mitigated by the recruitment strategy to increase volunteers. There are longer term risks and opportunities that may result from a review of the usage of station buildings and this will be mitigated by joint working with other members of the SCR family, the TOC and Network Rail.

In summary we are aiming for a 40% growth in net sales income over the 5 year period to 27/28, generating an additional £5.3k from 22/23.

### **Dent Station Cottage**

The cottage was acquired with member funds in 2020 and has a book value of £375k, albeit it is viewed as having an open market value of £500k+. The iconic property represents the most valuable asset held by the Friends and generates valuable income as a holiday let. Further information regarding the property is detailed [here](#).

Currently, the Friends receive rental income of £5k per annum with holiday let earnings from trading income retained by SCRC. In 2023/24, net profits are expected to be £12k+ with overall retained earnings of £25k+ since formation.

An overview paper on Dent Station Cottage was prepared and shared with the Board in November 2023. For information, this is attached as an addendum along with financials. It should be noted that when the property was purchased, it was agreed that a programme of restoration should take place. To date, the funds from the restoration have been paid from a Dent Restoration Fund with donations from members. These funds have more or less exhausted with a further year's costs to be incurred for the planned restoration. These are estimated to be £16k in 24/25 with annual maintenance costs of £5k-8k in future years to be allocated towards our asset.

The cottage is proving to be popular with utilisation from holiday bookings in excess of 90% in 23/24 and advance bookings of 40%+ for 24/25. The overview paper includes a SWOT analysis for the future running of the cottage. In particular, some of the themes to be explored relate to improvements in our booking and marketing, plus extracting funds from SCRC in a tax efficient manner and managing the key person dependency we have in managing the cottage.

These themes will be reviewed further as the future operation of Dent Station Cottage is included as part of the Strategic Business plan. At this stage, we have maintained our planned income as £5k per annum resulting from the rental of the property to SCRC.

### **Donations and Legacies**

The Friends benefit from the generosity of our members with ongoing donations that accompany membership subscriptions, web and mail order sales and stand alone contributions. Furthermore we do receive legacies from time to time. Donations are encouraged with prompts that accompany our subscription and distance sales media, generating approximately £10k per annum. Any legacies received further bolster this figure.

The Friends will continue to invite donations and will seek to expand opportunities that may prompt increased donations. Currently, we have budgeted to generate £10k per annum.

### **New Income Streams**

Building on the valued income from our existing channels, we will seek to expand income opportunities. These include grants and sponsorship as well as identifying opportunities to expand our trading activities. A further opportunity is to generate income from our cash reserves and with current interest rates, we anticipate income of £5k+ in 24/25 ahead of a projected fall in market rates thereafter.

### **B. Expenditure**

Expenditure includes core costs such as book-keeping, insurance, utility, IT and general running. There are then discretionary costs to develop the line and other strategic goals. Our aim is to minimise core costs and gain best value on discretionary costs and investments. The largest items of expenditure include retail stock purchases and membership costs including journal publication and administration. These will typically account for 50% of our expenditure and are detailed in the above commentary for Membership and Retail Sales. Other major expenditure includes Property Expenses, which amounted to c.£26k in 23/24 and relates to the maintenance programme for Dent Station Cottage with funds matched from the Dent Property Appeal and is also detailed in the above commentary.

Turning to core costs, insurance reflects a projected increase from £5k to £8k by 27/28 taking account of adverse industry trends. Professional Book-keeping is carried out by an independent firm whose services including Xero accounting software and the year end production of accounts. Their guidance and expertise have resulted in improved efficiencies across the Friends. This does incur a projected cost of £6,750 in the current year. IT Costs are expected to peak at £2,500 in 24/25 and will include the opportunity for a review of our current IT architecture with potential improvements to our website and online presence to further promote the Friends.

Our next major cost is for line development forecast at c.£10k, including station adoption activities which showcase the line to visitors and travellers. The largest part of this sum relates to the rent and running of Unit 8a at Settle Station Business Park. Historically this operated as a workshop to support joinery and maintenance of fixtures and building along the line. This no longer happens and machinery has been sold off, therefore the future of Unit 8a is under review with the potential to terminate the existing lease. This will significantly reduce line development costs from £11.6k in 22/23 to c.£2.5k in 25/26.

The projections detail other costs such as our commitment to integrated transport with £3k for bus support in the current year along with printing of leaflets for £750 to promote the varied activities on the line such as Guided Walks and Heritage projects. Other costs such as volunteer and meeting expenses are subject to a policy framework. Finally, there is the inclusion of a contribution towards a new Commercial Manager that is designed to promote activities and increase passenger numbers. This new position will be paid for and will benefit all members of the SCR family including DevCo and SCR Trust.

### **Moving Forward**

The above commentary details our plan to increase income and reduce costs which will result in increased funds available to achieve our strategic objectives outlined in the Business Plan. Net income is projected to increase from £60k in 23/24 to £80k in 27/28 with costs reducing to £70k and lower. The resultant increase in profits  $\leq$ £18k provides additional challenges with the risk of increased Corporation Tax liability to HMRC. In reality, this potential liability will be managed and reduced by directing our growing income towards expenditure that fulfils our strategic objectives. In summary, the financial outlook is very positive and is key to enable the Friends deliver its strategic objectives.

## Financial Addenda

### 1. FOSCL Financial Planning - P&L

INCOME	2023-24	2024-25	2025-26	2026-27	2027-28
Membership	25,000	48,000	46,560	45,163	43,808
Donations / Legacies	12,000	10,000	10,000	10,000	10,000
Sales Gross Profit	15,000	16,000	17,000	18,000	19,000
Property Income	5,000	5,000	5,000	5,000	5,000
Bank Interest	3,200	5,000	4,000	3,000	2,500
Other Income	250	275	300	325	350
<b>Total Income</b>	<b>60,450</b>	<b>84,275</b>	<b>82,860</b>	<b>81,488</b>	<b>80,658</b>
EXPENDITURE					
Accountancy & Bookkeeping	6,750	6,750	6,950	7,160	7,375
Archive Rental	1,000	1,000	1,000	1,000	1,000
Bank Charges	700	740	785	825	870
Committee Expenses	600	620	645	670	700
Training, Health & Safety	250	300	350	400	450
Volunteer Meeting Expenses	1,200	2,500	2,600	2,700	2,800
Depreciation	1,000	1,100	1,200	1,300	1,400
Insurance Costs	5,000	6,500	7,000	7,500	8,000
IT & Website	1,500	2,500	1,800	1,900	2,000
Line Development Costs	10,000	10,000	2,750	3,000	3,250
Membership / Magazine Costs	19,500	19,000	17,500	17,500	17,500
Miscellaneous	500	550	600	650	700
Property Expenses	26,000	16,000	5,000	5,000	8,000
Printing & Stationery	750	800	850	925	1,000

Subscriptions	200	220	240	260	280
Commercial Manager		7,250	7,470	7,700	7,930
Bus Support	3,000	3,100	3,200	3,300	3,400
Corporation Tax	608	1,016	4,355	3,743	2,661
<b>Total Expenditure</b>	<b>78,558</b>	<b>79,946</b>	<b>64,295</b>	<b>65,533</b>	<b>69,316</b>
<hr/>					
Surplus / (Deficit)	(18,108)	4,329	18,565	15,955	11,342

## 2. FOSCL Financial Planning - Balance Sheet

	2023-24	2024-25	2025-26	2026-27	2027-28
<b>FIXED ASSETS</b>					
Tangible Fixed Assets	377,741	377,741	377,741	377,741	377,741
Investments	1,002	1,002	1,002	1,002	1,002
<b>Sub Total</b>	<b>378,743</b>	<b>378,743</b>	<b>378,743</b>	<b>378,743</b>	<b>378,743</b>
<b>CURRENT ASSETS</b>					
Stocks	12,000	10,000	10,000	10,000	10,000
Sundry Debtors / Prepayments	1,500	1,500	1,500	1,500	1,500
Cash at Bank	215,000	220,000	240,000	256,600	268,800
Cash in Hand	400	400	400	400	400
<b>Sub Total</b>	<b>228,900</b>	<b>231,900</b>	<b>251,900</b>	<b>268,500</b>	<b>280,700</b>
<b>CREDITORS</b>					
Creditors	8,000	8,000	8,000	8,000	8,000
<hr/>					
<b>NET CURRENT ASSETS</b>	<b>599,643</b>	<b>602,643</b>	<b>622,643</b>	<b>639,243</b>	<b>651,443</b>

## Implementation in Year 1 2024- 2025: “Work Smarter, not harder!”

### 1. Introduction

This section seeks to illustrate how the implementation of the Board’s responsibilities can be carried out by concentrating on some practical next steps:

- Team and Task Force Working
- Volunteer Recruitment
- Releasing volunteer hours
- Communications with Members and Volunteers

#### Current workload

It is self evident that the commitment of up to two days a week (or more) from senior Board Members is such that Friends cannot nor should not seek to put extra duties on them. It is also true that recruitment of volunteers is needed in areas not traditionally linked to Friends’ activities.

We anticipate that the Association LSCA will employ a Commercial Manager, who will devote his/her time to activities some of which were previously done by volunteers.

The development of the Strategy and Business Plan brought forward a number of very positive contributions from members with no history of involvement with FoSCL and it is [perfectly] reasonable to expect that an appeal for additional volunteers asking for “Time and Talents” would bring forward positive responses.

#### 2 Team and Task Force working

Last year we identified problems with the gardens at Appleby Station. The matter was resolved by creating our own 6-person team, which in turn led to a locally based team of volunteers taking responsibility for the station. A similar pattern had happened at Lazonby years ago when the WI (with help from partners) had created some very colourful flower beds.

The Business Plan illustrates how, by working in diverse ways, we can make the workload possible by getting people involved in time limited tasks; these could be a project for 1 or 2 years, but quite often as short an input of, say, 10 hours in total over 3 months. This may require breaking down tasks among a distinct group of people, with one person overseeing.

#### Key Task

**A Director identifies up to four individuals not on the Board to come up with practical ideas as to how this can be achieved.**

#### 3 Volunteer recruitment

This has been identified as a major hurdle to progress, both with current activities such as On Train Guides and our shops, and for new projects such as the Horton café/bar. This needs a concerted effort, and it is suggested that a Task force is created to report before the AGM. There could be two co-chairs. At most there would be 4 meetings, either by zoom or WhatsApp. There would be Board, Team Leader and Volunteer representation either on the main group or in sub-groups.



The drive for volunteers should come from a mixture of the Teams themselves backed up by efforts from the Board. Team Leaders, like all of us come with different skills. The 18 team leaders could work in groups of 3 and be asked to brainstorm and then to come up with possible projects to focus on. We would end up with 6 reports and ideas.

For example, perhaps two people might share the interviewing of the last 10 new volunteers, asking why they joined and what has been their experience. In the same way the last 10 volunteers to leave could be spoken to, to find out why it was they left. This could bring forward lots of ideas.

Strategic input from Vice Chair

If the LSCA Association is to work the VC will reduce the time spent as Volunteer Co-Ordinator. We will need a Deputy for that role sooner rather than later, as well as geographically based Assistants.

### **Key Task**

#### **Establish volunteer recruitment task force to report by AGM**

#### 4 Releasing Volunteer Hours

**All Board Members and Team Leaders should be asked to make suggestions about how and where volunteer hours can be reduced.** Just two illustrations

- Does the Board really need so many monthly reports? Reducing this to bi-monthly, or even quarterly, would save many hours, and enable the Board to have more time for in depth discussions
- One Board Member spends 21 hours per month monitoring Northern trains performance. If NR and Northern Data were used, and if this was fed through the LSCA, hours would be saved, and the opportunities for dealing with senior managers or Directors at Northern increased

#### 5 Communication with Members and Volunteers

As important as recruiting new volunteers, is retaining those we already have. The suggested project outlined at 3 above will help with identifying motivations for those recently joining or leaving us; additionally, there are ideas in the emerging Communications Plan which are relevant to recruitment and retention.

## Part 3

### FRIENDS OF THE SETTLE-CARLISLE LINE

Company Limited by Guarantee



### BUSINESS PLAN 2024 -2029

#### Schedule of Supporting Appendices

- |  |         |
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| 2. Stakeholders                              | page 45 |
| 3. Volunteers                                | page 47 |
| 4. Dent Station Cottage                      | page 51 |
| 5. Understanding the significance of freight | page 59 |

#### Appendix 1: Additional Activity for Business Plan Period

##### **A1 Membership**

In 2023 the Board agreed a series of recommendations in a report prepared by the Membership Secretary and Treasurer. It covered: **Membership categories, Membership Subscriptions, Member recruitment, Methods of Payment, Membership Administration, Other considerations. The annual membership fee will rise to £20 from March 2024**

The priorities will be:

Implementation of new membership system

Negotiate relationship with Dev Co for administration of membership

New membership structures and pricing come into effect in *March 2024*

Securing an e-mail address for new members

Targeting the recruitment of young people and corporate members

The current benefits for being a member remain as follows:

Quarterly magazine featuring news of the line, available as traditional printed paper copy, or as an email pdf attachment.

Optional Dales Railcard currently offering one third discount off fares on the Leeds-Settle-Carlisle and Leeds-Morecambe lines plus occasional special offers

Free Dales Railcard for a year when you enrol as a Life Member

Guided Walks throughout the year

Opportunities to volunteer  
Social functions held at various times  
Satisfaction of knowing that you are contributing to the upkeep and development of England's most scenic railway.

The Board has undertaken an analysis of membership by post code. It illustrates that we have a widely spread membership. However, it points to significant gaps in most cities in the North of England.

## **A2 A sustainable organisation**

A key area is to ensure the Board and Volunteer Teams have plans in place for ongoing recruitment and retention including succession planning for key posts. It is equally important that the Board and Teams are well balanced in terms of age, experience and geographical location.

### **A2.1 Incorporation and governance**

We are an organisation in transition from one that might be fairly described as characterised by considerable individual working and driven by force of personalities, to one that is more consistent with a limited company, exhibiting teamwork and professionalism. This will take some time and we have limited capacity to get this done.

Four specific **recommendations are made** covering Director training, our two subsidiary companies, Articles of Association and what is now termed Stewardship.

### **A2.2 Director Training**

The Directors will need training in the changes to their legal responsibilities as a result of incorporation. For example, each Director should be clear when returns have to be made to Companies House. Each Director has a responsibility to follow this up

### **A2.3 Subsidiary Companies**

We must review the relevance and long-term need for the Midland Railway Company and the Settle-Carlisle Railway Company. Together with the MRC we must decide on our future with unit 8a

### **A2.4 Articles of Association**

**It is recommended that** we review our Articles of Association to tidy up any remaining anomalies. Report to the AGM in April 2025.

### **A2.5 Stewardship**

During discussions on the strategy the idea of having a group solely to keep an overview of matters that were absolutely necessary for an organisation to exist gained favour. None of our aims that are specific to increased passenger numbers, and better relationships with other partners can be achieved without proper arrangements for insurance, Companies House Returns, charging fees for services, membership, bookkeeping, licenses, membership of other rail organisations, budgets, postage and printing etc. **It is recommended that a team be formed.**

### **A2.6 At Board Level**

There have been significant changes at Board Level within the last 18 months. Currently we have only two board members with experience going back 15 years or more. Two

others were elected in 2018 with others coming in more recently in order to achieve the desired skills mix amongst Board Members.

On specific roles, **it is recommended that** a Director should assume overall responsibility for Health and Safety (Year1) and this should be separate from Safeguarding

There are several other roles which are recognised as Board responsibilities, and which could be assigned to appropriately skilled volunteers who may, or may not, be full Board members. These roles will cover communications, budgeting, heritage, training, safeguarding, schools (working with Dev Co) and Universities (primarily over recruitment.)

### **A2.7 Officer/Team Leader Appointments**

As with the Board there has been a notable influx of fresh blood. Nearly half of 18 team leader or officer appointments have been made in the last 18 months. This means that we will need to ensure that these individuals are able to receive ongoing support and training necessary to enable them to carry out their roles effectively.

#### A2.7.1 Safeguarding

It is recommended that Safeguarding is no longer linked to the Health and Safety brief. Different skills are needed.

#### A2.7.2 Schools Officer

In Year 2 a new schools officer is to be appointed to work closely with Dev Co in their role as the Community Rail Partnership.

#### A2.7.3 Universities

An appointment should be made of a Universities Officer (Year 2) with a brief of recruiting to the membership of Friends from within the student population.

#### A2.7.4 Finance

The Finance Director will be involved in the following areas:

- Core Treasurer role

- Membership (Implementation of the proposals for membership in the report considered by the Board in July 2023)

- Electronic Point of Sale {EPOS} should be implemented

- Fundraising opportunities ( including potential for donations and explore the possibility of gaining grants )

- Data Protection Officer

- IT responsibilities (with Webmaster) and succession planning

- Chair of Midland Railway Company

**One element of the core Treasurer role is the issue of delegated budgets. This will be introduced as soon as possible probably in shadow form in Year 1 and fully in Year 2.**

#### A2.7.5 Vice Chair

The Vice Chair in addition to representing the Chair when needed will be involved in:

- In house work relating to organisational principles and priorities

- Horton Cafe Bar

- Extension of Station Adoption to embrace more opportunities along the line

Communications together with Communications Advisors.  
Settle-Carlisle Alliance  
Promoting the line with new teams

#### A2.7.6 Website

It is recommended that a study should be made of the existing website and new proposals brought forward (YEAR 1).

#### A2.7.7 Health and Safety

It is recommended that early in YEAR 1 the Board consider a paper outlining work for the coming years.

### **A 2.8 Branding**

We have been known since our inception as the Friends of the Settle-Carlisle Line. (The Friends). Although the “Settle-Carlisle” part is a very powerful set of words in the public imagination, the acronym of The Friends is less well understood and there is a danger that the other part of the line SE from Settle towards Leeds is overlooked. For some years we have been referring more to the Leeds-Settle-Carlisle line which stresses the Leeds link, in particular seeking to generate more passenger traffic from the Leeds/Bradford conurbations. In communication with planning authorities the term Leeds-Carlisle (via Settle) is used. This is something that the Board asked the authors of the Communications Plan to use in their report.

### **A2.9 Merchandising**

During the drafting of this report the outcome of the Ticket Office consultation was announced on 31 October 2023 to the effect that the proposals have been withdrawn. If the proposals had been carried through as proposed, it would have led to the closure of offices in Appleby and Settle, which would have had a marked impact on our shops. We expect that all future merchandising will be coordinated closely with our partners in the LSCA.

### **A2.10 Volunteering**

#### A 2.10.1 General

Once the line had been saved The Friends responded in a positive way to a challenge from the Minister of State, Michael Portillo to do all we could as a Rail User Group to keep the line open. This we have done for 35 years.

This is done in two ways

- Enhancing the Passenger experience
- Bringing extra traffic to the line

A full picture of the extensive volunteering taking place within Friends appears at part 3, appendix 3, with some more detailed examples below

#### A 2.10.2 Recruitment of Volunteers

##### **We need a structured recruitment plan with objectives**

We have a need for new volunteers which should be addressed in a professional and organised manner with urgency.

### A2.10.3 Deputy Volunteer Co-Ordinator

**We should aim early in Year 1 to appoint a volunteer coordinator** to work closely to the Vice Chair

### A2.10.4 Walkers

For over 50 years the walking community has been heavily involved in supporting the Leeds-Settle-Carlisle Line and this tradition continues through our free guided walks programme. Our small team of volunteers offer walks every Saturday during the Summer and at least fortnightly during the Winter. Their popularity has gone from strength to strength. We aim to get as many people, from as many backgrounds as possible, out walking in the countryside and travelling there by train.

In 2023, the 46 walks attracted almost 1000 people (highest 48, average 21) 13% of whom were new to Friends. The Friends also took part in and sponsored the Ride2Stride Walking Festival when our walks attracted over 200 people.

We also highlight the variety of walks that can be accessed without the need for a car thus giving people a sustainable way to visit the countryside. The vast majority join the walks by train and most enjoy a visit to a café or pub at the end of the walk thus contributing to the local economies.

We positively encourage inclusion and don't operate as a walking club so all are welcome regardless of whether they are "regulars" or not. Anecdotally, we think our walkers are becoming more diverse. Most are aged 50 or above but we are getting a number of younger participants (we estimate around 10%) especially university students. One walk in 2023 attracted 9 Chinese students from various universities in the area but particularly Leeds. We think our use of social media has encouraged a younger demographic. Our Facebook posts are now being regularly shared with other sites including as far as China where some of the students who have attended the walks originally heard about us.

Many of the people who attend our walks will gain confidence and go on to do their own walks on the line so it is not a one-off benefit.

#### A 2.10.4.1 Footsteps in Time

The Footsteps in Time team is aimed at encouraging people to visit the area's walks and trails. Working alongside the other Friends teams, the FiT team helps visitors to explore the area around Ribbleshead and to understand more about the use of the line, the early building of the line, its history and stories of those that were involved throughout its 150 year life. In 2023, visitors explored the local geology and the material sourced in building the viaduct. We also have a growing collection of exhibits from the distant past and more recent railway history. We try where possible to engage with and promote other teams including the Settle Graveyard project and we in turn receive valuable support from them.

In 2023 10 events took place with approximately 500 visitors. 12 events are planned in 2024 with an estimated 600 visitors. Based on the percentage arriving by train in 2023 it is estimated 460 will arrive by train this new season.

### A2.10.5 Station Adoption

We have agreed that we wish to extend our local links with each station working with either the local Parish Council or the local Town Council. This will be a gradual process which we hope to complete by Year 5.

#### A2.10.6 Social Activities

If we want to increase cohesion between volunteers (**and members**) we should explore the possibility of having a social club designed mainly to take volunteers to parts of the line that not all will have visited. A group could be set up initially with a budget of £750. After that it would be self-funding. A few possible ideas are Wensleydale Railway, Horton Quarry and Hoffman Kiln, Long Meg and her daughters, older signal boxes

#### **A2.11 Sickness or Incapacity**

It is quite possible that a Board Member may be incapacitated for say 9 months through illness, injury, or family commitments. It is recommended that no later than July 2024 the Board consider a paper in which all Board Members suggest how their roles could be covered in the event that they become unable to carry them out.

#### **A2.12 Succession Planning**

It is recommended that a system for the regular review of planned succession at Board/Officer/Team Leader/Volunteer is discussed. This could be based upon interviews between each individual and someone from the next level above e.g. a Board member with the Chair and Vice Chair and a Team Leader with a Board Member during which any relevant feedback is discussed and the colleague's intentions for staying in the role are made clear. That would aid overall recruitment planning although emergency cover would be necessary on occasions.

### **A3 Communications**

#### A3.1 The Journal

The Journal is generally well received and provides a unique forum for communicating with our members and for generating ideas about the line. Some of our members who have direct experience working in the railway industry often have crucial insights. The fact that our membership remains high is due in no small way to the success of the current editor in maintaining interest.

An "advisory group" of three people should be established in year 1, to look at all aspects of the magazine, including content, frequency, online editions etc, and that we should aim for there to be a new editor ready to take up their post as soon as possible and no later than the 150 years anniversary in 2026

#### A3.2. Communications Strategy

The Board has commissioned a Communications Plan, looking both at internal communications and external communications. The Plan is to reinforce the Strategy and ensure that key messages are coordinated and used wherever possible with the overall aim of driving up passenger numbers and freight.

### **A4 Heritage**

Historically The Friends has contributed large sums to Heritage projects. On the Station master's House at Ribbleshead and Dent alone our contributions are about £800,000.

Overall, it must be close to £1m. In this area we must work jointly with the Trust to ensure that spending is coordinated and that we are addressing the jointly agreed priorities.

The **Settle-Carlisle Railway Conservation Area** (SCRCA) Project is independent of The Friends. It was set up in 2012 to identify, catalogue and create a comprehensive record of railway-related sites. (Details are available at <https://scrca.The Friends.org.uk/>) Currently we provide rail passes as long as we have them, insurance cover, occasional access to membership via the Journal together with webhosting.

**It is Recommended** that this continues, but that Friends develops a complementary strategy in conjunction with its LSCA partners, covering topics such as property ownership and improvements, Dent Station, station facilities (looking with Northern and Network Rail at standards for service provision at different types of stations) and signal boxes.

### **A5 Learning from the past and Grasping the Future**

Our Vice Presidents have a wealth of knowledge about the history of the line and of The Friends. We should make sure that we use this appropriately. We may also as suggested in the Communication Plan be able to "use" their names and influence to advance the Strategy aims.

It is recommended that in years 2 and 4 a gathering is held to which all would be invited to meet the current Board (and new Team Leaders) for a presentation and discussion about future plans,

### **A6 Archives**

One of the tasks for the LSCA would be to agree satisfactory access arrangements for the various stores of heritage material that exist. This, of course, can only be done successfully with the permission of the owners of the archive material. This would also be an opportunity to review whether arrangements are adequate for maintenance and refreshment of the exhibits held, and on display, at The Folly museum, in Settle.

Friends has recently appointed its historian to write a history of The Friends, and we have already agreed to develop an Oral Histories Project. The scope for such a project is massive when including all LSCA members.

### **A7 Stakeholders**

A schedule of potential stakeholders is shown in part 3, Appendix 2.

It is proposed that by the end of YEAR 3 we have formal links with nearly all our stakeholder organisations. Details to be worked through. It is totally unrealistic to expect this to be a Board only exercise. With the four larger Councils named contacts should be residents of that area; In respect of local stakeholders, we intend to align named individuals with the stations within the same County, eg North Yorkshire, Cumberland etc

#### A7.1 Grants to Local Communities

Part of the Strategy is about working with local communities over adoption of local stations through active local input. Recently a letter has been sent to all Parish Councils on or near the line offering them membership of and inviting ideas about collaboration with The Friends.



We should initiate discussions with LSCA partners and then with Northern about making grants to the communities served by the line between Settle and Carlisle, where these could play a relevant role in furthering Friends' strategy.

We should also begin to plan for a celebration of the 150 years since the line was first opened for passengers (2026)

### **A8 Legal issues**

Our legal advisor is happy to say that having considered the Business Plan and its Appendices (particularly part 3, Appendix 1) he: “.. can confirm that to the best of my knowledge there is nothing in it which on the face of it is either potentially illegal or unlawful and that it fits within our purposes as defined in the Articles of Association and takes into account issues that might arise over a 5 year period.”

### **A9 Seeking the views of users and Members**

The Friends has a good history of systematically seeking the views of users. This should be taken forward through the Alliance. We should extend this to our members as well

## **Appendix 2 - Stakeholders by Category**

### **1 S&C 'Family'**

Leeds Settle Carlisle Association (LSCA)  
Friends of the Settle-Carlisle Line  
*The Friends Subsidiaries*  
The Midland Railway Company  
The Settle and Carlisle Railway Company  
The Settle-Carlisle Railway Trust  
*Trust Subsidiary*  
Settle & Carlisle Railway Properties Ltd .  
The Settle-Carlisle Railway Development Company  
*Dev Co. Subsidiary*  
Settle Carlisle Railway Catering Ltd

### **2 Extended Family**

Yorkshire Dales National Park; Friends of the Dales;  
Lake District National Park

### **3 Councils – Large and Planning**

West Yorkshire; North Yorkshire; Cumberland; Westmorland and Furness; Yorkshire Dales National Park Authority

### **4 Elected Mayors**

West Yorkshire; Greater Manchester ; South Yorkshire

### **5 Councils – Town and City**

Carlisle; Appleby-in-Westmorland; Kirkby Stephen; Settle; Leeds

### **6 Councils- Parish**

Armathwaite; Langwathby; Lazonby; Kirkoswald; Dent with Cowgill;  
Garsdale; Horton in Ribblesdale

### **7 Community Rail Partnerships (CRP)**

The Settle-Carlisle Railway Development Company  
Bentham Line CRP  
Ribble Valley CRP ( Community Rail- Lancashire)  
Lune Valley Community Rail Group

### **8 Rail User Groups**

Friends of the Settle-Carlisle Line ( The Friends)  
The Aire Valley Rail User Group (AVRUG)  
Lancaster and Skipton Rail User Group (LASRUG)  
Ribble Valley Rail

### **9 Integrated Transport**

The Friends; Trust; YDNPA; Friends of the Dales;  
Lake District National Park

Action Yorkshire Transport.  
Dales & Bowland Community Interest Company.  
Action Climate Emergency Settle .  
Dales & Bowland Community Interest Company.  
Eden Tourism Network.  
Friends of Dales Bus.  
Friends of Eden Valley Public Transport.  
Western Dales Community Bus.  
Upper Wensleydale Railway

### **10 Bus Companies**

**Trans Dev** ( Skipton, Harrogate, Keighley and Burnley  
**Stagecoach** (Skipton, Preston ,Kirkby Stephen, Penrith, Carlisle, Hexham, Newcastle)  
**Lonsdale Buses** (Skipton Settle, Lancaster)\_  
North Yorkshire Council – Upper Wharfedale  
Dales Bus  
Fellrunner ( Langwathby, Penrith, Armathwaite, Carlisle  
Wright Brothers ) Langwathby,, Newcastle, Alston, Penrith, Keswick)

### **11 Heritage Railways**

Keighley and Worth Valley; Wensleydale Railway; Eden Valley Railway  
Embsay; Stainmore

### **12 Walkers**

Kirkby Stephen Walkers are Welcomel.  
Lancashire Dales Rail Ramblers.

### **13 Other**

**SELRAP (Skipton East Lancashire Rail Action Partnership)**

## Appendix 3 Volunteers

1. Volunteers are at the heart of what we do as the Friends of the Leeds Settle Carlisle Line. We currently have over 100 people who give their time generously to support the line directly by providing services, information, retail, walks, tours, cafes and others who monitor service performance, work with local authorities, liaise with the Train Operating Company and Network Rail.

We undertook a major exercise to measure the benefit of our volunteering. This is what we produced.

### Qualitative Input

2. Volunteers provide an enhanced experience for visitors using the Settle Carlisle Line in many different ways including as follows:

- **Ensuring a facility is provided for visitors** e.g. the Ribbleshead Cafe and Visitor Centre is only viable with volunteers. We receive around **6300** visitors per season
- **Selling refreshments, souvenirs and memorabilia** – through our 2 shops at Appleby and Settle and online. Visitors will often show items purchased to friends and families thus raising awareness. Sales help fund projects which enhance the line to visitors helping to preserve its historic character for future generations
- **Providing visitors with something to see** when they use the line. Our two preserved signal boxes at Armathwaite and Settle receive **2000** visitors per annum
- **Appealing to the growing tourist market.** Our On Train Guides are deployed on over **200** trains per annum in support of pre-booked coach tours enabling over **8000** coach passengers and a similar number of other passengers hear about the line. We explored expanding the service to cover some trains without tours in 2023.
- **Enhancing the Settle Carlisle Line offer.** Our Guided Walks, offered free of charge, attracted **1200** paid passenger journeys in 2022 with significant repeat business and new participants who have received personal recommendations
- **Making the stations attractive** through our station adoption teams operating at all 10 stations between Settle and Armathwaite. This includes maintenance of flower beds, gardens and heritage furniture. All stations are presented attractively to the thousands of passengers using the line. We receive positive feedback with many photographs being taken every year by visitors – many of which are shared on social media thus helping to promote the line to a much wider audience
- **Bringing history to life** through our new heritage tours offering a range of walks, talks and exhibitions from the iconic Ribbleshead Station. We ran through a full season in 2023 and estimate over **500** people took part
- **Promoting train services** by distributing **75,000** Line Guides per annum along with information on guided walks, heritage tours, connecting bus services and information leaflets from our many Local Authority partners along the line
- **Supporting diversity and inclusion** by promoting a dementia friendly user experience. In 2023 we began to approach minority communities in West Yorkshire & East Lancashire to grow the number and range of people visiting the line
- **Recording and promoting built heritage** through the work of our Conservation Area Team who maintain a detailed website, post regular social media articles and provide thousands of photos with free public access to promote awareness
- **Purchase and restoration of Dent Station building** – we have managed the process with our own volunteers and have improved the visual amenity of the

station. Many visitors now stay at this iconic location -the highest main line station in England. This continues the tradition of support for heritage projects along the line, notably through grants to the Settle Carlisle Railway Trust and other partners

- **Promoting the Line** - active engagement with community groups and councils along the line on a range of activities and events through which we gain valuable insight into the transport needs of the communities as well as promoting the line
- **Supporting services on the line** - working closely with the train operator and relevant parties, and provision of relevant data to improve timetables and services
- **Support for Integrated Transport** - through DalesBus and other organisations. We are actively involved in maintaining existing bus services to stations and seeking out new opportunities with local authorities. We have also made financial contributions for some years now towards connecting bus services and have supported the Northern DalesBus as featured on BBC4 'All Aboard the Country Bus'.
- **Health & Safety/Safeguarding** – helping to keep volunteers and visitors to the line safe through our expert knowledge, training, advice, support and regular site visits

### Quantitative Input

We have over 100 active members who volunteer on a regular basis plus local supporters who give their time to support and promote the line. We estimate over **32,000** hours per annum are deployed. Using **\*£26.10** per hour this equates to c.**£842,000** of benefit per annum

Volunteer input is shown by activity type and includes both direct and indirect support

<b>Activity</b>	<b>Hours</b>	<b>Commentary</b>
Conservation Area (SCRCA)	2000	Record, photograph, promote the heritage
Dementia Support	250	Supporting a dementia friendly line
Guided Walks	3000	Available free to the public all year round
Health & Safety support	500	Research, advice, support & site visits
Heritage Tours	1000	From Ribbleshead Viaduct
Holiday Property (Dent)	700	Available for rent by the public
Integrated Transport/Local Authorities	270	Working with Councils & Bus Companies
On Train Guides	3000	20+ Guides operating at least weekly
Ribbleshead Visitor Centre	3500	April to October at Ribbleshead Viaduct
S&CL publicity	1365	Line Guide distribution and social media
Service Monitoring/Northern Rail liaison	300	Including Service Improvement Group
Signal Boxes (Armathwaite & Settle)	2500	Including visitors, maintenance & supplies
Shops (Appleby, Settle, Online)	6750	All retail activities, purchasing and finance
Station Adoption/Gardening/Painting	6250	Making the stations attractive for visitors
Volunteer Support	900	Team Leaders, Coordinator, Board
<b>Total</b>	<b>32285</b>	

Internal administration and third party activities are **excluded** from calculations. Committee work supporting the line through our volunteer activities are **included**.

### Moving Forward

The majority of volunteers work in one of our teams listed below.

- Armathwaite Signal Box

- Communications
- Footsteps in Time
- Guided Walks
- Health & Safety
- Horton Cafe Bar (HCB)– in the process of being established
- Leaflet Distribution
- Legal Adviser
- Marketing – team to be established when resources permit
- Membership Manager
- On Train Guides
- Oral History– new project
- Order Packing
- Recruitment – team to be established when resources permit
- Ribbleshead Visitor Centre (RVC)
- Settle & Carlisle Railway Conservation Area (SCRCA )
- Settle Shop
- Settle Signal Box
- Social Media
- Station Adopters

Some of these are likely to see their priorities to change to meet the challenges set out in our strategy. At present it is extremely difficult to quantify this but the key changes are likely to be as follows:

- a. Rolling out a new station adoption model with more emphasis on local “ownership” of the station with a focus on the social value of the station to the local community
- b. Partnership working within the family and TOC to promote the train – and linked bus services – over the car for walking and general tourism to Yorkshire, Cumberland and Westmoreland
- c. New services for passengers as retail and cafes are established by station buildings being brought into new uses
- d. Promotion of membership to younger people, diverse communities and urban areas
- e. A new approach to Safeguarding
- f. Rolling out standard Health & Safety practices for Teams and Volunteers to use
- g. Marketing the line to increase overall passengers and journeys likely to be in collaboration with partners – involving social media, local media, ticket promotions, special trains etc.

## **Appendix 4: Dent Station - Overview**

### **Introduction**

The purpose of this paper is to provide an overview of the investment in Dent Station made by The Friends of the Settle-Carlisle Line (“The Friends”) including the subsequent renovation and income generation it offers as a holiday let. The property is showcased on the [property website](#).

Dent Station was purchased in 2020 by The Friends on an opportunist basis rather than being a long term strategic objective. That said, the iconic property represents the most valuable asset held by the Friends and generates valuable income as a holiday let. Further information regarding the property is detailed [here](#). The paper also explores options for the future.

### How much did the Friends pay for Dent Station?

The schedule below details the purchase and associated costs which

#### Net Book Value

<b>Purchase Price</b>	£ 360,000
<b>Stamp Duty</b>	£ 11,000
<b>Stamp Duty Refund</b>	£ (10,817)
<b>Professional Fees</b>	£ 2,558
<b>Heating Replacement</b>	£ 12,150
<b>Net Book Value</b>	** Expression is faulty **

have resulted in a net book value of £374,891. The property was purchased with funds accumulated from donations and legacies, including a significant sum from the estate of the late John Disney.

#### Dent Fund Movements

	2021-22	2022-23	2023-24 (7m)
<b>Opening Balance</b>	£ 37,527	£ 35,234	£ 24,161
<b>Plus Donations</b>	£ 2,097	£ 195	£ 37
<b>Plus Rental Income</b>	£ 7,500	£ 5,000	£ 3,750
<b>Plus Bank Interest</b>	£ 3	£ 0	£ 0
<b>Less Property Maintenance / Renovation</b>	£ (11,893)	£ (16,268)	£ (25,809)
<b>Carried Forward</b>	0	0	0

## Dent Fund Movements

	2021-22	2022-23	2023-24 (7m)
<b>Notes - Maintenance / Renovation</b>	Roof Repairs	Windows / Repairs	Pointing / Repairs

### **How much has been spent on renovations?**

At the time of purchase, it was agreed to continue to operate the property as a holiday let whilst carrying out a renovation programme over several years to include work on the roof, windows, pointing and heating. The renovation programme resulted in the property being closed each year with a resultant loss of holiday income. The current programme is scheduled to complete in May / June 2024 with the work carried out in 2023 documented via the [attached link](#).

Since purchase, £53,970 (net of VAT) has been spent on the renovation programme utilising monies from the Dent Fund. This fund includes donations raised from the Dent Appeal along with property rent paid to the Friends. A full breakdown to September 2023 is detailed below:

### **How do the Friends operate the Holiday Let?**

Whilst the property is owned by the Friends, it is leased to a subsidiary company, The Settle & Carlisle Railway Company Limited (“SCRC”) who manage and operate the holiday let business. The rental consideration is £5,000 per annum and is subject to annual review by the Friends.

The shareholding of SCRC is held by nominee shareholders on behalf the Friends. Currently, these are Paul Kampen (PK) and Damian Smith (DS), with a holding of one £1 share each. There is a board of directors chaired by John Carey (JC), Jill Tiernan (JT), Pete Myers (PM) and DS with PK as Company Secretary.

Holiday lets are marketed via <https://www.dentstation.co.uk/> plus selected rail enthusiast website and publications. Bookings are available for 7 nights from Saturday to Saturday or split weeks available for 4 nights, Saturday to Wednesday or 3 nights, Wednesday to Saturday. The process is managed by Rachel Griffiths (RG), from the initial booking and deposit, through to the payment of the final balance and the period of the guest stay. RG operates on a freelance basis retaining 12% of the gross rental. RG liaises closely with DS to confirm receipt of guest funds. The cost for each stay is determined on a seasonal basis and agreed jointly by JC, DS and RG.

JC undertakes hands on management of the property with regular site visits to ensure the property is maintained and is operated to a high standard for guests. There is a level of complexity to manage services with a bore hole water supply, oil and coal for heating plus refuse management. JC also carries out site maintenance, utilising local tradesmen for renovation and other work as required. JC is supported with housekeeping, which is



carried out by Diane Wharton (DW) on a self employed basis at a cost of £100 to prepare for each stay.

#### Accumulated Profit

	2020-21	2021-22	2022-23	2023-24 (7m)
<b>Retained Profit / (Loss) brought forward</b>	£ 0	0	0	0
<b>Net Profit / (Loss)</b>	£ (15,406)	£ 25,190	£ 3,684	£ 7,672
<b>Retained Profit / (Loss) carried forward</b>	0	0	0	0

All operational costs are paid for by SCRC, along with fixtures and fittings, repairs and renewals.

#### Is the holiday let business profitable?

The business is profitable now with accumulated net profits of £21,140 since formation to September 2023. This is stated net of rent paid to the Friends amounting to £16,250 since 2020.

A breakdown of profit for each financial year is detailed below. It should be noted the first year loss reflected start up costs and enforced government closures for COVID. This was followed by further COVID closures in year 2, however SCRC did benefit from COVID small business grants to generate a net profit of £25,190 in 2021-22. In 2022-23, profitability was further impacted by an extended closure to accommodate planned renovation. This theme continues in 2023-24 and will complete in the next financial year.

Looking forward, the holiday let business offers significant potential to increase profitability and generate funds that may be channelled to the future strategic aims of the Friends. To highlight this potential, a report was made to the November Friends' Board meeting, titled "Dent Projected Running Costs v Revenue Projection 2024". In summary, pre tax profitability for 2024-25 has been projected at £18k taking account of a planned six week closure for renovation. Without a closure for renovation, profits would increase to £25k. This is based on a conservative occupancy of 81.7% compared to 88% for the weeks available for booking in 2023 and does not reflect rental payments to the Friends. The potential for profitability increases to £32k+ based on 100% occupancy. These projections take account of an 11-16% increase in the fees per stay, applied to 2024 bookings. Currently there is a positive uptake with forward bookings totalling £19k+.

#### What are the Strengths, Weakness, Opportunities and Threats as we currently operate?

Great work has been undertaken to integrate a holiday let business within the Friends group of businesses and make this profitable. This excellent work extends to the extensive renovation programme carried out on this iconic heritage building as England's highest

mainline station. Whilst there is a team of individuals involved, this would not have been possible without the dedication and commitment of John Carey.

A SWOT analysis is tabled below which is largely self explanatory. These are explained and commented on in the following section “What is next for Dent Station?”

<b>STRENGTHS</b>	<b>WEAKNESSES</b>
Iconic Building - Highest Mainline Station in England	Keyman Dependency re John Carey
High Booking Utilisation and Great Customer Feedback	Remote Location / Distance to Remedy Call Out Issues
Profitable Business	Limited Marketing Profile as a Single Property
Property has Increased in Value	Booking Process has Multiple Steps and is Expensive
Co Structure re VAT and Small Business Rates Relief	Extracting Money in a Tax Efficient Manner
<b>OPPORTUNITIES</b>	<b>THREATS</b>
Adopting an Online Booking System	Reduced Bookings resulting from Cost of Living Crisis
Joined up Marketing for SCR Properties	Impact of Weather Extremes in Remote Location
Extracting Money in a Tax Efficient Manner	Unexpected Building Repairs

### **What is next for the operation of Dent Station?**

This iconic property is part of the heritage of the Settle Carlisle Railway and represents the most valuable asset owned by the Friends, estimated to be worth in excess of £500k. It is therefore a credit that the building has been restored and showcased as a holiday let for members and guests to experience its splendour. Not only is this profitable, there is excellent feedback from guests. Looking to the future, it makes every sense for the Friends to retain ownership and ensure it continues as a holiday let.

Noting the current weaknesses, it is appropriate to explore some of the opportunities that are available to the Friends:

**Marketing:** An analysis of booking sources reveals that 50% of bookings result from paid for advertising including Railway Magazine and Railway Cottages website. There is an opportunity to showcase Dent Station along with other properties operated by members of the SCR family (i.e. Settle & Carlisle Railway Properties Limited). Working in partnership would be consistent with the guiding principles of our new strategic planning plus it means that we would benefit from the economies of scale achieved from advertising. It also

presents us with the opportunity to promote the family properties via our own communication channels to generate more visitors to the line and its attractions.

**Booking Process:** It is standard for prospective guests to utilise online booking platforms rather than enter into a manual process that requires email and phone calls. These booking platforms are user friendly, efficient and result in increased bookings from spontaneity. The current manual process, albeit exercised with a personal touch, is comparatively expensive amounting to 12% of all booking income and excludes the cost of advertising. The opportunity is to utilise an online booking platform, by acquiring our own or utilising the existing functionality used by other members of the SCR family.

**Extracting Money in a Tax Efficient Manner:** The holiday let business is managed by SCRC on behalf of the Friends. Whilst financial benefits exist in the day to day operation, there are also some weaknesses in how money is extracted from SCRC. In terms of the benefits, SCRC are exempt from Small Business Rates Relief (approx £3,000) and as they are not registered for VAT, they are exempt from charging / accounting for VAT on the property rentals. On the downside, SCRC are unable to claim VAT refunds on fuel and other costs. A further benefit is that the property is owned by the Friends, who are VAT registered which has meant that VAT has been reclaimed on the costs resulting from the renovation programme.

On the downside, the annual rent payable from SCRC to the Friends is subject to VAT. SCRC will also be liable to Corporation Tax on future profits which are projected to increase significantly. An opportunity exists to make a charitable donation equivalent to future rentals / taxable profits, which could be made to the Settle & Carlisle Railway Trust which ensure all funds remain within the SCR family. There is the potential for the funds to be returned to the Friends by way of a grant for ongoing renovation / building repairs at Dent or to be retained within the Trust as a restricted fund, or another agreed purpose. In summary, there is the opportunity to utilise the charitable status within the structure of the SCR family to better utilise funds generated from the holiday let business.

**Managing Other Weakness:** The issues associated with the remote nature of Dent Station are recognised, particularly when a fault is reported by a guest. These have been successfully managed to date by the dedicated approach from John Carey. This commitment cannot be taken for granted and this keyman dependency is recognised as a weakness. In reality, there is no easy solution, however there are options to minimise this weakness in our current operation. These include utilising a third party call out service or utilising the services of local paid resources. We may also wish to discuss how this issue is managed by the Settle & Carlisle Railway Properties Limited.

**Summary:** In conclusion, Dent Station is a valuable asset for the Friends with excellent potential to generate profit by continuing to showcase the property as a holiday let. Since purchase in 2020, there has been a significant renovation programme of this iconic heritage structure. Moving forward, the Friends have the option to continue as we are, whilst managing the points detailed in the SWOT analysis. Alternatively, there is the

potential to explore the opportunities presented by working in partnership with the wider members of the SCR family. Given the new found harmony across the SCR family, we have a real opportunity to work together for our mutual benefit, whilst still retaining full ownership and influence over its future operation and income.

## **Appendix 5: Understanding the significance of freight: historically, now and in the future**

From the very outset freight was, and remains vital for the S&C. 1875 saw the full opening of the line, tellingly for freight only. Stations and other key facilities had to wait for their building materials to be brought to site - by rail. Most of the station buildings are made of stone, either Yorkshire sandstone brought in from the south, or red sandstone from the north and Scotland. The coming of the railway enabled quarries to be established, particularly in Ribblesdale, alongside or near to the railway, some with their own extensive sidings. Nine of the original twenty stations had goods sheds and sidings too. Coal, coke, lime and limestone formed half of the freight business by tonnage. Other minerals, general merchandise and livestock accounted for the rest. Most of that business has since gone - as have many of the stations and almost all of the freight facilities.

During the line's threatened closure in the 1980s regular S&C freight ceased completely. Many rail-connected quarries had ceased to use rail by the 1960s, but reprieve of the line in 1989 brought back the prospect of heavy freight returning. However, the state of the tracks and infrastructure, neglected whilst closure threatened, made this largely impractical. Outside factors were at play: the closure of almost all UK coal mines, the development of containers for goods in bulk and an ongoing expansion of the road network. Meanwhile the country relied heavily on coal fired power stations, increasingly dependent on imported coal, for which the S&C provided a crucial link, especially to the deepwater port of Hunterston on the Clyde. The line underwent massive upgrades in the 2000s including near total track replacement, extra intermediate block signals and substantial other works. Its then capacity was approximately doubled, with coal trains running 24/7.

Amid increased awareness of a need for net-zero energy production, coal fired power stations were phased out, almost eliminating the S&C's imported coal traffic but leaving a vastly upgraded yet underused freight line with huge spare capacity. Some of that capacity has been absorbed by the return to rail of stone traffic from Dry Rigg and Arcow quarries near Helwith Bridge. Unsuitable Dales roads have been relieved of quarry lorries with the opening of the Arcow sidings in 2015. The unqualified success of that link has prompted the rail re-connection of the much larger nearby Horton quarry, imminently. Other freight flows include gypsum to Kirkby Thore, cement from Clitheroe to Scotland, timber from various locations to Chirk and occasional china clay.

Two major limiting factors of the S&C are its limited structure gauge (W8) and its present reliance on diesel traction.

An absurdity, at odds with net-zero, is the present need to drag the heaviest stone trains from the Ribblesdale quarries up to Blea Moor to reverse, return and pass their very origins.

