

Shelburne Falls Trolley Museum, Inc.

Final Report of the

Five Year Plan 2017

This Final Report is presented by Sam Bartlett, President, on the progress or lack thereof, on the 2017 Five Year Plan. Final Report comments are in italics below each section.

Mission Statement (Approved 5/27/2001)

To preserve railroad and trolley history and artifacts, especially of the Franklin County, Massachusetts area, and to educate the public about these artifacts and historical information through collection, restoration, display, demonstration and interpretation.

This mission is carried out by:

1) Preserving railroad and trolley history and artifacts by collecting, restoring and displaying trolley cars, locomotives, rolling stock, tools, equipment, photographs, ephemera and other items associated with the purpose, use, operation, function, study and enjoyment of railroads and trolleys.

2) Recreating the experience of an early-1900's rural street railway by giving rides on our demonstration railway on restored trolley and railroad equipment. The rides include interpretive talks on the history and uses of the equipment, the importance to the community of the services the railroad and trolleys provided and their role in the development of the community.

3) Offering educational programs to area schools and organizations about the history of the local trolley and railroad operations.

4) Restoring and maintaining the historic freight house and yard to demonstrate their significance on the community.

Five Year Plan 2017 (Approved 5/10/2017)

This document describes the Programs and Projects that the Shelburne Falls Trolley Museum Inc.'s Board of Directors (“we”) wants to maintain, continue and/or implement in the next five years, consistent with the Mission Statement. Programs are efforts that are ongoing, such as our interpretive rides. Projects have a more limited time frame, such as a car restoration. Projects usually are in support of a Program. Other Programs and Projects that are not listed here may be implemented if approved by the board and if sufficient other resources are found so that the added Project or Program will not impact

those listed in this Plan. The Mission Statement guides us, but does not limit us, in choosing new Programs and Projects.

GENERAL

We feel that the overall direction of the museum is appropriate and should be continued. We feel that the museum has been fulfilling its Mission Statement, but that improvements can be made to more completely fulfill the Mission Statement. We feel that the museum is on sound footing financially but that many of the Projects listed below will require additional funding from grants and donations. We intend to keep the museum as primarily an all-volunteer operation.

I do not foresee any changes to the above direction.

PROGRAMS

Rides: We will continue to offer interpretive, historic and safe trolley and hand car rides to the public on weekends and holidays from Memorial Day weekend to the end of October, and Mondays in July and August. This Program includes:

- Recruitment of crew members,
- Training of crew members in the safe and attractive operation of the rides,
- Preventative maintenance and cleaning for No. 10 trolley and the hand car,
- Track inspection of the in-use tracks, and maintenance and repairs as necessary,

Projects related to this Program are Spare Trolley Car, Spare Trolley Trucks and House Track Rehabilitation.

Except for losing a full year in 2020 and one month in 2021, we were successful in implementing this Program. We were able to weather the closure financially, which speaks well to our money management approach. I do not anticipate any major changes to this Program in the next Five Year Plan, although a increase in ridership, without increasing our operating hours, would be welcome.

Visitors Center: We will continue to interpret and display artifacts, photographs and ephemera in the present Visitors Center space in the Warehouse (sometimes called the “Agway Building”). We will continue to sell railroad related items, books, toys, gifts and other items in the Gift Shop in the Visitors Center. We will continue to provide space there for families to play with toy trains and other railroad-related items. Under the direction of the General Passenger Agent, we will work to create more retail and interpretive display space, but overall space is limited.

Projects related to this Program are the Porch Completion projects.

Again, except for the pandemic, we were successful in implementing this Program.

Freight Yard: The historic Buckland Freight Yard is our home. As such, it is a vital part of our visitor experience as well as an important part of our Mission. In July 2018 we will make our final mortgage payment for the yard. The yard and buildings are also an important source of revenue from rental of surplus space. We have completed an exterior restoration of the Freight House. We have built a fire-resistant Car Barn. We have performed extensive clean up including minor (e.g. brush cutting, mowing) and major (e.g. Freight House dock removal, Creamery demolition and removal) projects. We will continue keeping the yard attractive, and will work to find less visible locations for the unsightly equipment that is awaiting restoration, and to remove materials that are not needed for our Programs and Projects. We want to install more interpretive signage in the yard. Our rental space is fully occupied and we will work with our tenants to keep them satisfied.

Projects related to this Program are House Track Rehabilitation, Water Main Replacement, Building Improvements and Track Extension.

We did pay off our mortgage in 2018, and continue to generate income from the tenants who rent our surplus space. This income aided our survival through the pandemic and was not diminished by the pandemic. We cleaned up more of the scrap material in the yard, and our volunteers continue to keep it mowed and trimmed and looking attractive. We installed interpretive signage for the rolling stock. We added signs for each of the SF&C historical stops along our right-of-way. We completed the Porch Replacement and Water Main Replacement Projects. We have (nearly) added an updated Crew Room in the Visitors Center, which also houses the plumbing service. The Freight House had a new ridge cap installed.

Member Outreach: Our Members are an important part of our success. They provide an important source of moral support, revenue and volunteers. We will continue, through our Membership Clerk and our Transfer Editor, to keep contact with our existing members through renewal requests, through our website and emails, through our newsletter the “Transfer”, as well as through our other Programs. We will continue to recruit new Members through our Rides, Visitor Center and Public Outreach Programs. We will continue to expand our Corporate Sponsor program.

Project related to this Program is Membership Growth.

Again, despite some bumps due to the pandemic, we have maintained our Membership levels. Growth has been elusive, however. See the discussion below on the Membership Growth Project. Except for a combined Summer/Fall 2021 issue, we have put out three Transfers each year.

Public Outreach: We will continue our Public Outreach program through the efforts of our Public Relations and Marketing Coordinator. We will continue to fine-tune our rack card distribution and our media exposure. We will continue our web site and social media efforts. We will continue with our Trolleyfest event. In 2017 we will experiment

with a TV-ad campaign.

All of these Public Outreach efforts have been on-going, except for a pause for the pandemic. Web and social media efforts continue, although we are perhaps lacking in cutting edge social media like Instagram or Twitter. We worked on some videos but they did not get much notice when we posted them. The TV ad campaign we paused in 2020 (closed) and 2021 (opened late) and 2022 (we weren't sure if we were opening at the time we would have had to sign a contract). With almost no publicity in 2021 and no special events like Trolleyfest or Moonlight Magic we had about 80% of 2019's attendance.

Educational Outreach: We will continue to host school and youth group field trips, and make sure that local schools know about our field trip program.

We did host some school field trips. We need to focus some effort on this if we want it to improve.

Volunteer Retention and Recruitment: The museum is an all-volunteer operation. Our present volunteer participation is adequate for operations but we can always use more help. Our Crew Dispatcher will continue to make sure that we have a crew for each operating session. We could use more volunteers to take on minor projects that they can do with minimal oversight. We could use more volunteers who have the time and skills to be a Project Coordinator. We will work to retain our current volunteers by maintaining a safe, rewarding and friendly work environment, and providing a variety of Projects and Programs to work on. Our Project Coordinators will work to recruit volunteers for their Projects. The Public Outreach, Member Outreach, Visitor Center and Rides Programs will continue to recruit new volunteers.

At present our volunteer participation is barely adequate. We have lost some valuable volunteers to death and health issues and have gained some very valuable ones. A dedicated recruitment effort for more volunteers was largely unsuccessful. Outreach to visitors and in the spring in newspapers seems to be our most successful efforts.

Visitor Experience: Our visitors are crucial to our Mission. The above Programs all support the Visitor Experience. In addition, we will produce a walking tour and safety handout pamphlet for our visitors. We will install a high level loading platform at Salmon Falls.

We did not start on the walking tour and safety handout pamphlet. We did install a high level loading platform at Salmon Falls. The interpretive signs on the rolling stock have QR code on them for people to go to the web for more information. Web pages for each piece of rolling stock were posted to support this effort.

PROJECTS

Caboose CV4015: We will continue to complete the exterior and interior restoration of this caboose. Sufficient Funds have been allocated. The caboose will be displayed outdoors during the operating season unless restoration activities dictate otherwise. Winter storage location will depend on other Projects' needs. Interior access will be available to the public during operating hours unless restoration activities dictate otherwise. Project Coordinators are Dave Dye and Sam Bartlett.

The caboose is a big attraction. We had the exterior lettered for the Central Vermont as it once looked. Minor interior work is still needed on the caboose, as well as some exterior repainting of steps, walks, etc.

Spare Trolley Trucks: We want to have at least one spare motorized truck (wheel sets and frames) available in case of malfunction with one of No. 10's trucks. We have purchased two trucks that can be motorized. At least one of these trucks will be rehabilitated as needed and have one of our two spare motors installed. Once the motor is installed the truck will be stored primarily indoors. One or both trucks may be used as 'shop trucks' for another project, and are available to be incorporated into an operating second trolley car if one becomes available (see Second Trolley Car Project). Some additional funding may be required for rehabilitating the trucks and installing the motors. Project Coordinator is Sam Bartlett.

This Project has made some progress, with one truck being completely torn down, cleaned and sandblasted and primed. It is now being painted and reassembled. Some repairs are needed and some fasteners have to be fabricated. The long-term goal has shifted, we now intend to make both the spare trucks be unpowered. Once we have one truck completed we will remove one powered truck (one motor) from under No. 10 and replace it with an unpowered truck. We will remove the other powered truck from under No. 10 and put both rebuilt motors into it, and put it back under No. 10. Then we can have the two existing motors overhauled if needed and installed into the truck that we removed from No. 10, giving us a spare two-motor truck and a spare unpowered truck. These trucks can be kept as spares or used under Fitchburg and Leominster No. 60.

MBTA PCC Trolleys: We have two PCC cars from the MBTA that are currently non-operational.

We will focus the resources for this project on PCC 3321, the last trolley car built in Massachusetts. We will make needed repairs to make the car movable. We will hire a professional prepping and painting job with the aim of restoring the exterior of the car to its orange and cream color scheme. We will hire or use volunteers for the necessary body work, focusing first on repairing enough steps and doors to make the car's interior available for public viewing. We will replace all the windows and doors. Interior cleaning and restoration may proceed during or after the exterior restoration.

If resources permit, we will examine the electrical and mechanical components of 3321 and determine if an operational restoration is feasible.

A donor has pledged \$12,000 for prepping and priming 3321. The Board has directed over \$5000 additional funds for this car. More grants and donations, as well as extensive volunteer time, will be needed to move this project forward.

PCC 3299 may be used as a parts car if we determine that operational restoration of 3321 is a worthwhile endeavor. In the meantime, it will be painted in the MBTA Green Line scheme by volunteers. The scraping and painting should be carried out in early 2017 to improve the appearance of the yard. The windows removed from 3321 will be used to replace the missing 3299 windows and additional windows will be bought if needed. Doors will be rebuilt or replaced with non-operational inserts. 3299 may have its trucks, electrical and mechanical equipment removed for inspection and/or rehabilitation for 3321's restoration. 3321's trucks may be used as shop trucks if needed. This Plan does not anticipate cutting up or scrapping the body of 3299. A portion of the funds available for 3321 will be shared with 3299. Additional volunteer time will be required to move this project forward. Project Coordinator is Sam Bartlett.

Very little had been done with these cars. New door panels have been created and painted and hinge assemblies for them are being assembled. At present the cars do not roll so they are hard to work on. I do not anticipate any major changes to this Project in the next Five Year Plan.

Bangor and Aroostook Railroad 230, “American Flyer”: This car will receive exterior volunteer painting to its BAR original paint scheme. Funds have been allocated for the exterior painting. If additional financial resources are obtained, the long-term plan for this car envisions restoring part of the interior to its appearance as a Maintenance-of-Way camp car, with beds and kitchen facilities. Another section will be set up to display tools used by Maintenance-of-Way workers. This car eventually needs extensive body panel replacement. The PCC Trolleys Project takes precedence over this project. Project Coordinator is Tony Jewell.

Some work was done on the interior to remove unwanted items. Some scraping and wire-wheeling has been done on the roof. Rust inhibiting paint has been purchased for the roof but won't be applied until the rest of the roof is scraped. I do not anticipate any major changes to this Project in the next Five Year Plan.

F&L St Ry No. 60: We want to move No. 60 from Ashburnham into the Restoration Bay of the Car Barn or the Shed. At least a portion of No. 60 would be restored to show the workmanship of Wason Manufacturing of that era (1904). The car would be available for viewing by the public as restoration permits. Funds have not yet been identified for this move, about \$6000. Project Coordinator is Sam Bartlett.

Except for occasional visits to check up on No. 60, nothing has changed here. I do

not want to move the car here until the Car Barn extension is closed in. I do not anticipate any major changes to this Project in the next Five Year Plan.

Second Operational Trolley Car: We feel that to support our Rides Program, we should not be solely reliant on No. 10. We will research and compare two different approaches to having a second operable trolley car. We will look for a trolley car body at another museum or private owner that could be operated on our spare trucks. Project Coordinator is Tony Jewell.

We will also research the feasibility and cost of building a replica of an open trolley, such as SF&C No. 15 (double truck) or SF&C No. 14 or 16 (single truck). Project Coordinator is Tony Jewell.

There are not many options for purchasing a second car or car body that could be put to use without a lot of restoration. In a twist to this Project, we have been offered the use of a “soon-to-be-restored” trolley car. We would not own it, but it would live here and we could use it as part of our trolley Rides Program. Given this turn of events, I do not think we will be buying or building a second trolley car in the next five years. But since this deal has not been concluded, it would make sense to keep our options open if somehow a suitable car came on the market.

B&M Box Car: We will pursue grants of \$12,000 for prepping and painting this car back to its B&M blue scheme. The American Flyer Project takes precedence over this Project. This car will continue to be used for storage. This project needs a Project Coordinator.

Except for Caleb Neelon's occasional street art painting of the car, no progress has been made on this Project.

HT&W Flat Car: No work beyond removing the wire installation mechanism is anticipated for this car. If needed, the trucks from this car can be used for shop trucks, but then the body needs to be stored somewhere out of the way.

No progress.

Boom Truck: This truck needs its power steering and brakes repaired. Some funds have been allocated for this work. We do not want to spend money on this truck beyond what is needed to keep it operational. This truck supports the House Track and Track Extension Projects. Project Coordinator is Sam Bartlett.

Power steering and brakes have been repaired. The swing mechanism is broken and it is unclear if it is repairable, but the truck is still useful as a dump truck.

House Track Rehabilitation: The House Track needs substantial tie replacement, and some rail replacement to be able to be kept up to standards. We will completely replace, straighten and realign the section of the House Track that is under gravel at the end of Depot St. Project Coordinator is Sam Bartlett.

The House Track between TO 2 and 3, including the section under gravel at the end of Depot St., has been substantially upgraded, with all ties replaced with relay ties and some rails replaced. Old dirty ballast was replaced with crushed rock or gravel. Some minor crib dressing is still needed in TO3. The rest of the House Track still needs many ties and some rails replaced.

Track Extension: We want to have more storage track space near the Car Barn, so that ongoing Projects can be close to the shop. We will extend the Loop Track from Turnout 5 along side the Car Barn, and install TO 9 to allow for a track to extend westward toward the current end of the North Track. The House Track Rehabilitation Project takes precedence over this Project. We do not anticipate building the Loop Track or a track down Depot St in this Five Year Plan. Project Coordinator is Sam Bartlett.

Except for about 20 ft at TO5, nothing has happened with this Project. I do not anticipate any major changes to this Project in the next Five Year Plan.

Building Improvements: Our buildings are an important part of our yard and our visitor's experience, as well as a source of revenue. We want to finish the Visitors Center Porch. We want to paint or stain the Shed. We want to put the final touches on the Car Barn. We want to start planning for the extension of the Car Barn. We will research systems for fire suppression as well as funding for such systems. We do not anticipate moving the Visitors Center to the Freight House in this Five Year Plan. Except for repairing and painting trim we do not anticipate replacing the siding on the Warehouse in this Five Year Plan. Project Coordinator is Sam Bartlett.

The Visitors Center porch is finished and has been much appreciated. The Shed has not been stained. There is still a small amount of trim to install on the Car Barn doors. The Car Barn extension planning is under way and much of the needed funds have been raised. The new Water Main is in place to allow for sprinklers. I still do not anticipate moving the Visitors Center in the next Five Year Plan but if we get another shut down we could consider renovating the current Visitors Center while shut down. We have a building permit to replace one and remove the other Office windows and repair the siding on that section of the Warehouse, but no work has been performed. We moved the Pump Car Shanty to the east end of the Middle Track. The Freight House got a new ridge cap. We installed a used metal shed for paint and gas and oil storage.

Water Main Replacement: The present water main to the Visitor's Center is inadequate. We will find funding for replacing this water main, taking into account the needs of sprinkler systems if the Building Improvements Project determines that sprinklers are advisable. We will make the water main extendable to the Freight House for later expansion. This is a high priority Project for funding. Project Coordinator is Sam Bartlett.

This project is complete. We ran a 6" main from Elm St to the east end of the Freight House, and installed a hydrant at Elm St. We added taps for fire-suppression sprinklers

for the Visitors Center, Car Barn and Freight House, and a 1" supply line to the Visitors Center. The water supply equipment is now in the new Crew Room, which is insulated and heated.

Transportation Bulletin Update and republish: We want to get permission as needed to republish the Transportation bulletin article about the SF&C, as well as add more recent information and pictures. This Project needs a Project Coordinator and some unknown amount of funding.

Little progress has been made on this Project. The current TB was scanned and put on line, and we do have permission to use the content in a republished format. I do not anticipate any major changes to this Project in the next Five Year Plan.

Membership Growth: We will use various approaches to increase revenue and volunteerism by doubling our Membership revenue. Dave Goff is the Project Coordinator.

Membership revenue for 2016 was \$4934 with 119 members. Membership revenue for 2021 was \$8408 with 115 members. This is a 70% increase in revenue, but 0% increase in member headcount. The 2021 number includes two new Life Members, at \$1000 each. If you discount for them, since they may not recur, then there was a 30% increase in income. The income increase seems to be solely from increased levels of membership giving, as opposed to increased membership headcount. A flyer was produced to encourage new members to join, but it is hard to judge its success.

Final Report Conclusion: *We were able to meet many of our goals and some remained elusive. The pandemic did not help our efforts, but we were able to survive it intact (so far). I think we should continue to support our existing Programs as we did the last five years. Except for the Projects that are completed, I suggest that most of the Projects continue as laid out above. Additionally, we ought to add some new Projects, like creating a Restoration Shop (metal and carpentry), Training and Safety and the Motor Car.*