

Wiscasset, Waterville & Farmington  
Railway Museum

# Long Range Plan

May, 2005

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Wiscasset Waterville & Farmington  
Railway Museum, Inc.  
Alna, Maine USA

May, 2005

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profit corporation exempt from federal  
income tax under section 501(c)(3) of  
the internal revenue code.

Printed in the United States of America

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# *Wiscasset, Waterville and Farmington Railway Museum*

**May 7, 2005**

## **Long Range Plan**

*The Wiscasset, Waterville & Farmington Railway Museum, Inc., is a non-profit organization established in 1989 to acquire, preserve, and restore the operation of narrow gauge railroads and equipment which operated in the Sheepscot Valley and on other roads and to establish a Museum for the display of artifacts for enlightenment and education of the general public concerning the social and economic impact of railroads on the communities served.*

### **Preamble**

The WW&F mission statement, quoted above, defines the parameters of every aspect of our operation. Our organization has a myriad of independent goals that separately serve to better our operation in a variety of ways, but collectively serve to meet our stated purpose of restoring the operation of the WW&F Railway and establishing a first class museum as its namesake.

This Long Range Plan has been carefully formulated to identify, plan, and coordinate the many different aspects of our operation that collectively serve the greater purpose stated above. It addresses the goals specific to each area of concern, provides sound reason behind those goals, and suggests the means to meet those goals. The plan also provides for the coordination between these goals so that the resources of the organization are utilized to the greatest advantage. The careful and thorough generation of this plan is described below.

### **Plan Generation**

In February 2004, the Board of Directors appointed a Long Range Planning Committee to draft a plan for the Museum's future. James Patten was appointed Chair, with Dave Buczkowski, Jason Lamontagne, Ken Maguire, and John McNamara as members. The Committee first drafted a survey that was enclosed along with the May/June 2004 Newsletter. Prior to mailing the survey, an informal survey was undertaken among the volunteers present during the Spring 2004 Track Laying Weekend. More than 180 responses were received to the mailed survey, which is greater than can usually be expected in a survey of this type. We believe that this is due to the passion and commitment of our members. Fourteen of those responses were in the form of letters, and many contained ideas that are incorporated in the Plan. Many of the responses echoed similar concerns and desires.

Simultaneous with the drafting and circulation of the survey, the Committee also reviewed the 1996 Five Year Plan, the 2002 Plan, and the Museum Mission Statement. The Committee met in its entirety twice, mainly holding discussions via hundreds of emails. After the research and outreach was completed, the Committee met to break down the results into the categories enumerated in the Overview section and discussed in detail in their respective sections. The Committee discussed each category and subcategory and gained consensus before moving on to the next category.

The Committee feels that the Museum, as it has developed, has a vibrant and dynamic atmosphere with a passionate and committed membership that should be embraced and preserved for future generations. This Long Range Plan is the Committee's proposed roadmap to that future.

## **Overview**

After the member survey, research, and vigorous and open discussions, the Committee formulated the categories and matters that the Plan should address. The Committee's intent was to be all-inclusive and to address all areas that could potentially affect the Museum and its members. In formulating the Plan, financial, personnel, and logistical matters were taken into account. The major categories, as well as their subcategories, are discussed in the sections that follow.

## **Appreciation**

The Long Range Planning Committee appreciates the support of the Board of Directors and the members of the Museum, both those who volunteer at Sheepscot and those far away. Their ideas and support have been invaluable in the formation of this plan.

## Section 1 Railroad Operations

### *Executive Summary*

The operation of the present day WW&F Railway has been broken into three topics:

1. **Regular Operations:** Regular passenger service should be provided from Sheepsfoot to Alna Center at intervals of one hour or less throughout the normal operating season. Trains should be hauled by steam locomotives, and other details of the operation should remain historically appropriate as much as practical.
2. **Special Operations:** Non-regular train service should be expanded to include a wider range of operations and a longer operating season. We should promote the use of the railroad by charter and tour groups. Events such as the recent Spring Solstice Celebration should be held along the railroad to promote community and membership involvement.
3. **Operational Management and Safety:** The management of the railroad operation should ensure that the railroad is operated smoothly and safely. Regular rules and training sessions should be provided to ensure that the qualification of operating crews is maintained and to expand the operating personnel pool. The railroad should strive to become FRA-compliant within the next five to ten years.

### *Intent and Function of Railroad Operation*

One of our intended purposes as defined in the bylaws is to restore the operation of the WW&F Railway. Specifically, the operation of the railroad serves these inter-relating functions:

**Preservation.** In conjunction with historically appropriate equipment operating on the original right of way, period-correct operation preserves a nearly complete representation of the original WW&F Railway as a unique historical operation.

**Experience.** We can provide a living history experience that is rare in the railroad preservation business, thereby making our organization a unique draw to visitors, volunteers, and supporting members. Further, a friendly and informal ambiance meshes well with community relations and involvement, and therefore allows us to host and promote community events.

**Activity.** The activity of our railroad animates our restoration efforts and brings life to those efforts. Together with a common appreciation for our preservation efforts, the operation of trains inspires our volunteers, members, and visitors to interact and support our efforts. In this way, the operation and the growth of the railroad promote each other and cause a greater success of our overall goal of restoring the WW&F Railway.

**Transportation.** In contrast to many other tourist or preserved railways, our operation still provides a means of transporting people and goods from one point to another. We move construction materials, and we carry passengers to activities such as track extension, events at locations requiring rail access, and attractions such as Alna Center Station. Even though we do this in a different context than the original railway, maintaining the transportation aspect is a means of preserving the actual purpose of the original railway.

**Income.** The operation of the railroad directly provides income to the organization through passenger ticket sales, chartered train revenue, and Museum Store sales. While this income is not the major source of the organization's funding, it is significant and is growing with the rest of the organization. The operation of the railroad can increasingly provide a tangible amount of income for the furtherance of our goals.

## ***Detailed Discussion***

The subsections that follow provide the background and detail that led to the recommendations found within each of the three topics of the executive summary of this section. Each subsection is divided into a number of subjects appropriate to each topic.

### **1. Regular Passenger Operations.**

**History.** Regular operations began in 1996 when the first 735 feet of mainline track was put into service, enabling visitors to see the work being done to extend the line. Building the railroad has always been one of our organization's largest sources of visitor interest and enthusiasm. As the operation has grown, train operation has been refined to reflect a more historical operation, to a point where the experience in itself has become an attraction equivalent to the reconstruction efforts.

**Season.** The season for regular operations, from Memorial Day weekend through Columbus Day weekend, provides 19 weeks of regular operation that coincide with the summer tourist season. Passenger operations a month or so before and after this period are less regular.

**Weekly Schedule.** We presently offer regular passenger service on both Saturdays and Sundays throughout the tourist season, with Saturday-only service offered both before and after the season. Passenger service is occasionally offered on Friday afternoons and evenings, usually in conjunction with a special event. As our operation grows, we should consider offering service on Fridays, and possibly Thursdays, throughout the busiest part of the season. This service can be tested and eased into, and the experiences of similar organizations, such as Boothbay Railway Museum and Maine Narrow Gauge Railroad, can be considered. The addition of weekday service is, however, dependent upon crew availability.

**Timetable Operation.** Regular passenger operations have operated on a timetable for nearly seven years, with great success over the previous "as-needed" operation. Timetable operation consolidates passengers onto fewer trains, making more efficient use of equipment and fuel. It also allows more un-interrupted time for maintenance crews and allows the convenient dispatching of work trains between regular passenger trips.

**Service Interval.** The time elapsed between passenger trains leaving Sheepscot Station, or service interval, is of great importance in obtaining the maximum ridership. The longer someone visiting Sheepscot must wait, the more likely they will leave without taking a ride. We believe the successful service interval is directly related to what is offered at Sheepscot Station to occupy our visitors' attention as they wait. With our present attractions and activities there, we feel that the service interval should not exceed one hour. Since the service interval is dependent upon the length of the railroad, we recommend the use of more than one train to maintain this interval when it can no longer be met with one. Exceeding the one-hour service interval would be acceptable during the slack times of the season.

**Ticket Prices.** Passenger Service was initially offered for free. A price of \$2 was set not long after service began, and this price was periodically increased to reflect increases in operating costs. Presently ticket prices stand at \$5 for adults and \$3 for children. Members and Seniors receive a discount. We have very few complaints concerning our ticket prices, therefore showing that we are not approaching the limit of what people are willing to pay for what we offer. We anticipate raising the fare as the ride becomes longer.

**Push-pull Train Operation.** To date our trains have operated "push-pull" style. While our crews are trained to back trains, this operation is cumbersome and leaves more room

for error than conventional operation. This problem should largely be eliminated with the addition of run-around tracks at Sheepscot and Alna Center. However, as construction continues north of Alna Center, the need to back trains at least some distance to the nearest run-around will remain. Given the continued need to back trains safely, we recommend continued careful training and special attention to safe backing.

**Train Operation Style.** As stated above, one of the functions of our operation is to preserve the original railway's operating methods. The most visible example of this is the use of steam locomotives, which draws great interest and attention from visitors, volunteers, and members alike. Our ridership increases with steam operation, and our members reflect their interest in it with their involvement and gifting. We have instituted a number of other period-appropriate methods that add to the historical experience we offer, including the use of hand signals and lanterns, magneto telephones, and old-fashioned dispatching techniques. These period-appropriate efforts should be continued and expanded as much as possible within the limitations of safety and our resources.

**Multiple Train Operation.** As the line grows, it may be necessary to operate more than one passenger train at once to maintain a reasonable service interval from Sheepscot. There are several ways that the use of two trains can be used to both provide service over the entire line and to maintain the desired service interval. One option is to have two trains operating from opposite ends of the line, passing at or near the middle. Another is to have a regular train from Sheepscot Station to Alna Center, with a smaller train such as a railcar offering service from Alna Center to the end of the line. Yet a third option is to operate a regular train from Sheepscot Station to Alna Center, with a second train making a fewer number of trips over the entire line.

## 2. **Special Operations.**

Special operations are trains operated in addition to regular season scheduled passenger trains. They may include community event trains, off-season passenger trains, chartered trains, special-event trains, or non-revenue trains. The purpose of special operations is to reach out to and attract a wider customer base, and to provide a greater variety of ways for people to experience our operation. Further, the railway is used to move construction materials and volunteers as well as other internal needs.

**Community Events.** Community-based events foster good will and promote good relations with our neighbors. These events serve as a "thank you" to local people for hosting us in their town and provide them with some incentive to keep working with us. Further, local people are the most likely to become repeat customers. Community events can be considered in two categories: those that are jointly produced with groups or organizations beyond our own, and those that are targeted at a local audience, but which we produce independently.

Producing events in concert with local groups benefits both parties while strengthening relationships for future cooperation. We have worked with groups such as the Young Marines and Project Graduation in maintenance projects and recently worked with a local group to produce a Spring Solstice Celebration.

Our Christmas operation is a good example of an independently produced event that serves to maintain a connection with the local community. Other events should be developed, such as summer family day, outings for Scouts and other civic groups, hosting historical societies, providing a historical program centered on our railroad operation, and other concepts that expand our attractiveness to the local community.

the historical and cultural services that we provide available to a broader spectrum of customers. Keeping the railroad active in the off season also maintains a level of volunteer interest, keeps us in the public eye, maintains training opportunities for new crew members, and keeps the railroad open for internal transportation needs, more events, charters, or unexpected needs.

Foliage trains can be promoted in the fall, while “early bird specials” may be promoted for visitors before the regular season begins. These times also see a substantial amount of non-revenue train movements for internal needs. A winter event might focus on winter railroad operations for rail enthusiasts, winter sporting and leisure activities such as sledding, skating, and skiing for local families, or attract volunteers for an operation-oriented work weekend.

While some of these ventures may not provide a significant amount of income, the other benefits as described above at least make them worthy of consideration. Such operations should at least be self supporting so as to not affect the budget of other activities within the organization at those times.

Off-season operation, particularly in the winter, must be balanced against the difficulty and cost of keeping the railroad line open, and the need to focus our labor on other tasks such as maintenance and construction projects. The amount of effort put into off-season operations should be proportional to these factors, and these operations should not supercede other necessary functions within the organization.

**Charter Trains and Groups.** A great potential for increasing our exposure and ridership lies in attracting tourist and special interest groups who visit our area. Promotional effort targeted to such groups would bring substantially more visitors than the same amount of effort targeted to individuals or families. While reduced fares for these groups might result in lower income per visitor, many of these visitors would likely to have not heard of us and would not have otherwise visited us. This in turn means a greater exposure, after which repeat visits, word of mouth, and visits by friends and family follow.

Care must be taken in hosting large groups, as our current facilities (restrooms and walking paths) are not well suited to this. We recommend that large-scale promotional efforts to attract these groups be deferred until some of these issues can be resolved. However, such groups should be accommodated now if they seek us out.

**Historical and Educational Programs.** We have a unique opportunity to develop and offer programs that teach, demonstrate, and showcase a wide variety of practices, technologies, and services associated with the original railway. These programs may include events that demonstrate typical period train operations and associated practices, such as Railway Post Office operations, freight handling techniques, and mixed train operation. Operational events like this can be used in conjunction with peripheral operations such as a sawmill. Seminars could be held teaching the technology, rural Maine life (and the railway’s effect on it), and other aspects of the original railway, contrasting these topics to the modern equivalents.

Developing and offering these programs enables us to preserve and share more aspects of the original WW&F Railway than merely catering to tourist traffic. They can enrich the cultural and historical relevance of our operation as a whole.

**Non-Revenue Operations.** The majority of our non-revenue operations involve the transportation of people and materials used for the construction and maintenance of the railroad. Train operations used for crew training, free public events, promotional, and other purposes are included. They are also ways of utilizing the advantage of the railroad and expanding its usefulness, which serves to further our goal of preserving the operation.

### 3. **Operational Management and Safety**

**Safety Goal.** The primary goal in our operational procedures, along with the training and qualifications that go with them, is to minimize or eliminate personal injuries of any kind, and to minimize or eliminate damage to equipment and tools, whether resulting from normal operations or from an incident.

**Management Goal.** Operational management should consistently allow the operation of trains and associated activities to proceed safely, smoothly, and efficiently by ensuring that the equipment and tools needed are serviceable and available, that there are sufficient numbers of qualified operating personnel, and that all personnel involved are properly coordinated. We should seek uniformity across all train operations, so that training is simplified, operating personnel are entirely interchangeable within various tasks, and misunderstandings about procedure are minimized.

**Training.** While our safety record has been outstanding, and considerable effort has gone into training our personnel, there are still weak spots. These include a lack of medical training, a lack of uniformity in some procedures, a lack of understanding of the purpose and implementation of some of the rules by some of the crew, and a lag in the way that crews are trained and qualified.

This is a volunteer organization, and many volunteers are attracted to our organization because of its informality, promotion of freedom, and personal nature. These characteristics are vital to the organization's survival and high volunteer involvement level. The structure and enforcement used to enable a safe and smooth operation can oppose these values if they are not properly implemented. Every effort should be made to minimize the burden of management systems, such as operating rules and procedures, training and qualification programs, management hierarchies, and enforcement practices. These systems, while important, are not a direct goal of our operation and are not commonly the source of enthusiasm for our volunteers.

The operating rulebook provides parameters by which crews are taught and operate trains, and there are operating practices that can vary and evolve. Presently, there is no mechanism to consistently bring uniformity to some of these practices. While there are standards for the training of operating personnel, there is no training program that ensures regular opportunities for volunteers to advance their qualifications.

We recommend the establishment of regular operating meetings. These would serve to: a) maintain our personnel's knowledge of the operating rules, b) maintain uniformity within the operating practices through open discussion, and c) provide a forum for the presentation of special training, such as medical procedures. The meetings should be short and should be offered frequently to minimize the burden to our volunteers.

The training of operating personnel could be facilitated with the use of an annual training session. This session would be offered off-season, so trains could be operated for training purposes un-encumbered by frequent revenue trains, and would serve to provide consis-

tent instruction to a large number of trainees at once. A training session may be used in conjunction with individual training, with trainees apprenticing with qualified crew members, throughout the year.

**Federal Railroad Administration.** Our railroad will come under the jurisdiction of the Federal Railroad Administration should it cross a public road, such as Cross Road or Rt. 218 in Head Tide. While not within the range of this Plan, the possibility of crossing a public road exists at some point. The FRA will require us to meet a number of standards that we currently have not obtained. While some of these requirements will be easily met, others are more substantial and will be a heavier burden on our organization and its personnel. We recommend that the organization make every effort to identify and meet these requirements within the next five to ten years, such that coming under the FRA will not cause a sudden and overwhelming burden to our operation. A representative of the FRA should be invited to visit us and guide us toward compliance.

## Physical Plant

### Section 2

#### ***Executive Summary***

The physical plant recommendations been organized as six topics within this section:

1. **Track Extension:** Over the next five to ten years, we propose extending the track at the current rate of progress, 1100 feet (0.2 mile) per year. If the needed landowner permission can be obtained, and the Carlton Brook bridge built, trackage would reach Route 218 in 2013.
2. **Special Track Considerations:** Additional track projects should include a siding to a car storage facility on the Boudin property, a possible siding for a sawmill at Alna Center, a siding at the Top of the Mountain, and a run-around at Route 218.
3. **Land:** Access to our new land at Alna Center for storage of stone should be improved by upgrading Averill Road. Lease extensions and possible purchase of land for a Visitor Center should be pursued within a few years
4. **Buildings and Facilities:** Rest rooms and increased parking should be constructed as soon as possible, followed by a car storage facility on the Boudin property. In addition, several smaller projects, such as the Head Tide water tank replica, a coal storage facility, a wood shed, and a blacksmith shed, should be constructed at Sheepscoot Station.
5. **Track Maintenance:** There should be semi-annual work sessions and additional scheduled track maintenance weekends.
6. **Buildings and Grounds Maintenance:** Cleaning supplies should be stocked at a designated location and their use encouraged by a volunteer sign-up list. Buildings should be scheduled for painting every five years.

#### ***Detailed Discussion***

##### **Track Extension**

1.

**Functions.** Track extension serves several vital functions: a) It inspires the volunteers, b) It inspires the donors, c) It motivates visitors to make return visits to view the progress, and d) It furthers our goal of railroad restoration.

**Rate of Progress.** Over the past several years, we have added about 1100 feet (0.2 mile) of in-service track every year. The availability of funding and volunteer manpower match this amount of progress very well. Further, the current rate of progress serves the aforementioned vital functions very well.

At this rate of progress, we will reach the current end of W&Q property in 2008, and have a 2.5-mile railroad. Assuming we can obtain the needed landowner permissions, and assuming that we continue construction at the current rate, we would reach Route 218 (3.5 miles) in an additional five years (2013). The requirement for a bridge over Carlton Brook is covered below. At this point, it is difficult to project beyond ten years. There are plainly three alternatives: continue towards Head Tide, proceed southward, or stop.

2. **Special Track Considerations**

- **Run-arounds.** During 2005, we plan to install the north switch at Alna Center and the south switch at Sheepscoot, thus completing the installation of run-arounds at both locations. This will allow engine-first operation both northbound and southbound.

Further, the Alna Center siding will permit two-train operation (see “Railroad Operations”). In addition, a siding off the current Alna Center siding may be constructed to serve a sawmill at some point in the future.

**Access to Car Storage.** With the arrival of an additional coach (see “Equipment - Rolling Stock”), we will need additional storage, and the Boudin property is the recommended location for this. Thus, within the next two to three years (2007-8), we should complete trackwork preparations by grading and installing track across the Percival purchase into the Boudin purchase with associated switches and sidings for storage.

**Top of the Mountain Siding.** The WW&F had a siding at the Top of the Mountain for use by trains that had to “double the hill.” This plan calls for restoration of that siding when the track reaches there (2009), both for its original purpose and to allow work crews to get out of the way of scheduled operations when such operations reach that point.

**Carlton Brook Bridge.** To reach Route 218 by the anticipated date (2013), a bridge of approximately 90 feet will be required across Carlton Brook. In the same fashion as our rebuild of the Humason Brook trestle, every effort should be made to have the new Carlton Bridge replicate the original structure at that location.

**Facilities at Route 218.** After the railroad has reached Route 218, a run-around should be constructed there to provide the same engine-first operation that will soon be achieved with trains to and from Alna Center. If a small quantity of land could be purchased at that location, terminal facilities of some type could be established there, both for the convenience of the railroad and to catch the eye of passing motorists.

### 3. Land

**Averill Road.** To minimize the travel time for trains providing stone for future track extension projects, we will want to store stone at the recently-acquired Alna Center property (200’ x 100’). For heavy trucks to reach that property, Averill Road must be restored. Stumping, grading and the addition of substantial quantities of gravel will be required on this 1550’ road before heavy trucks can use it. It is anticipated that funding for this project will be part of the 2005 Annual Fund Appeal, so completion of road restoration will likely be completed in late 2005 or early 2006.

**Easement Extension.** An effort should be made to secure longer easements or outright purchase for any property that the railroad currently traverses or will traverse during the period covered by this plan.

**Visitor Center Lot.** During the 2008-2009 period, negotiations should be undertaken with the goal of securing land for a possible visitor center.

### 4. Buildings and Facilities

**Restrooms.** One of the most requested items in the Long Range Survey was “real restrooms.” Women, who often play a key role in family trip planning, are especially bothered by our lack of restrooms. Further, there is high likelihood that guidebooks and tours would not include us without these facilities.

It is the general consensus of the Long Range Planning Committee that the restrooms need not be especially large. A shower should also be provided for each sex. Should larger facilities be required at some point in the future, they can be part of a visitor center.

The restrooms should ideally be located close to the station for the convenience of the volunteers and the passengers, especially those that arrive just before train time. Unfortunately, this would require pumping the effluent a substantial distance to reach the disposal facilities on the Boudin or Percival purchases. Trenching for such a project should include any water lines also anticipated for other projects such as the water tank. An alternate proposal would be to construct them on the Boudin property adjacent to the parking there.

**Parking.** In addition to restrooms, the other oft-requested improvement was improved parking. Completion of the Boudin and Percival purchases has made this possible, and clearing work on the Boudin property should commence this fall. Stumping, grading, and gravel installation is planned for the 2006 time frame.

**Alna Center Station.** The interior finish work at the Alna Center station building should be completed in 2005.

**Water Tank.** Thanks to a grant from the Amherst Railroad Society and a tank-for-rail swap with the Sandy River Railroad, a replica of the Head Tide water tank will be constructed in 2005. It will be located across the track from the section house.

**Wood Shed, Blacksmith Shed.** Plans for 2005 include two small structures of size and construction similar to the hazardous materials shed. One would be used for wood storage, and one would be used for a small blacksmith forge.

**Alna Center Stone Storage.** We should clear the land recently purchased at Alna Center and begin storing stone there as soon as the Averill Road restoration project has been completed. It is anticipated that funding for the Averill Road restoration will be included in the 2005 Annual Fund appeal, and that stone storage can commence in 2006.

**Sheepscot Yard Cleanup.** In conjunction with the “Presentation” section elsewhere in this plan, and the “Wood Shed, Blacksmith Shed” subsection above, this plan proposes an extensive cleanup of the Sheepscot Yard area, both to make it more attractive and to promote safe walking about for volunteers and visitors. There were several adverse comments in the Long Range Planning Survey concerning the appearance of the engine house area. All junk should be stored in a visually fenced-off area.

**Coal Storage.** While a temporary coal storage facility was constructed in 2004, a more permanent facility is needed for the 2006 time frame. It is possible that road access via the Boudin and Percival purchases might be required such that coal delivery trucks can reach the facility. The facility should be designed for convenient transfer of coal to the locomotives.

**Car Storage.** “Equipment - Rolling Stock” proposes an additional coach. This should definitely be stored indoors away from the weather and possible vandalism. Other cars and equipment presently stored outdoors, such as caboose #320, could definitely benefit from indoor storage. Therefore, this plan proposes the construction of a car storage facility on the Boudin/Percival purchase during the 2006-2009 time frame. With the car storage building in place, it should be possible to expand the present engine house to enlarge the machine shop and convert part of the enlarged building into a carpentry shop.

**Visitor Center.** To provide adequate and appropriate space for the preservation and display of artifacts, the sale of merchandise, and the presentation of audio/visual programs, the construction of a Visitor Center is recommended. Provision of such a building would also separate these 21st Century activities from the historic activities taking place in present Sheepscot Station buildings.

As soon as there are indications that property can be secured for the purpose, planning should begin for a Visitor Center. As negotiations firm up, a capital campaign for the Visitor Center should begin, followed by more detailed planning and actual construction.

## **5. Track Maintenance**

**Scheduled Events.** Like the current work weekends, but on a reduced scale, we propose to schedule one to four track maintenance weekends per year. The number of weekends scheduled will be limited by volunteer availability and the need to interrupt or reduce passenger train operations.

**Tie and Right-of-way Maintenance.** We anticipate the need to replace about 100 ties per mile per year plus occasional ballast maintenance and rail replacement.

## **6. Buildings and Grounds Maintenance**

**Cleaning Supplies.** A specific location for the cleaning supplies used in cleaning buildings and cars should be designated and maintained.

**Building/Car Cleaning Duties.** Building and car cleaning should be listed on a volunteer to-do list.

**Restroom Cleaning Duties.** If possible, cleaning the restrooms should also be a volunteer project. However, if this does not work out, a contract should be let to a commercial cleaning service.

**Painting.** The buildings were painted in 2003. We should expect to have to paint them every five years.

## Section 3      **Equipment**

### ***Executive Summary***

The equipment required to operate the WW&F Railway has been divided into four categories for discussion within this section; the recommendations associated with each of these are outlined below.

1. **Motive Power:** An operating roster of two steam locomotives, one mechanical locomotive capable of heavy work, and one locomotive performing light work is ideal for the operation outlined within this planning period. Having but one operating steam locomotive is putting maintenance strains on the entire remainder of the roster. Thus, the restoration of locomotive 9 is important operationally. The operation of locomotive 9 will also meet a long term goal of our organization to restore and operate as much original equipment as possible. Consideration may be given to a constructing a replica of another WW&F steam locomotive at the end of this planning period or into the next planning period.
2. **Rolling Stock:** Our rolling stock roster is presently deficient in two areas: the lack of long-term security with coach 3, and insufficient capacity of work trains, equating to the need for at least one more flatcar. The construction or acquisition of replicas of WW&F coaches will serve several functions including improving our historical representation and ensuring security by using our own equipment. For the sake of general preservation, some arrangement should be found with the Maine Narrow Gauge Railroad that allows an overhaul and restoration of coach 3.
3. **Maintenance of Way:** Relatively low-cost additions to our MOW equipment roster will greatly aid the efficiency and ability of our road crews. Tamping equipment is of the highest priority, while additions such as a derrick car and a pump car will allow crews more flexibility. Such improvements should be considered when the need arises, and made when time and funds allow.
4. **Non-Railroad Equipment:** Because we depend so much upon a loader that lacks both capability and reliability, we should consider replacing it. Further, the acquisition of a piece of heavy construction equipment, hopefully by gift, would provide roadbed preparation at a much more cost effective rate than the present practice.

### ***Equipment Needs***

The equipment roster must be sufficient to operate and maintain the present day WW&F Railway, and support the growth thereof, and is based upon two needs:

**Operational Capacity.** The equipment roster must be sufficient to meet the operational needs as described in the railroad operations section. The locomotives must provide motive power for trains of varying numbers and weights as required by the operation. Ridership levels dictate the total seating capacity of the passenger equipment. Other equipment must be suitable to provide the level of infrastructure support dictated by the main part of the operation.

**Preservation.** The use of preserved original equipment, the use of equipment that represents that used by the original railroad, and new equipment built to the same specifications as original equipment, are all vital functions in meeting our organization's goal of restoring and preserving the WW&F Railway. To this end, the equipment roster should be historically appropriate to the greatest extent practical.

## ***Detailed Discussion***

The subsections that follow provide the background and detail that led to the recommendations found within the executive summary of this section.

### **1. Motive Power**

**General Discussion.** The WW&F Railway Museum locomotives may be considered in three classes: steam locomotives, heavy-service mechanical locomotives, and light service mechanical locomotives. The number of locomotives available for service within each class should be matched to the operational needs of the railroad; the actual number of locomotives owned and maintained by the organization is determined with consideration to these operational needs as well as maintenance rotations and the availability of back-up power in the event of mechanical failure.

**Steam Locomotives.** Our present operation utilizes steam motive power for the majority of the summer passenger operation, as well as occasional off-season passenger operations and non-revenue operations spread through the year, particularly during the work sessions held in the spring and fall. While there are a variety of reasons for using steam power in these operations, one of the main purposes of using steam in passenger operations is to maintain the historically accurate presentation of our operation to visitors. This suggests that a minimum of two operating steam locomotives should be maintained, both to allow for a regular maintenance rotation and to ensure that steam service is not indefinitely interrupted in the event of mechanical failure of one of the locomotives.

Locomotive 10 is well suited for much of the work required of it in our present operation. It is large enough to handle our typical passenger trains over the line from Sheepscoot to Alna Center, yet its small size and easy handling provide excellent training opportunities. Number 10 is also very economical, and can be used in non-revenue and marginally profitable operations to further our goal of historic operation and to bring more enthusiasm to these operations. As our only operating steam locomotive, Number 10 carries a disproportionate share of operation along with the associated wear and tear, and must be maintained in a very reliable state so that regular steam operations are not unduly jeopardized by mechanical failure. Number 10 will likely prove itself underpowered for typical trains operating on the steep grade north of Alna Center, thus requiring reduced train sizes or limiting the operation of this locomotive on that grade.

Locomotive 9 is currently undergoing restoration and should be ready for service within 3 to 6 years. As an historic artifact, Number 9 will add greatly to the historic re-creation efforts in our operation. It will ease the work load on Number 10 substantially, and generally allow more dependence on steam power for our operation. As a heavier locomotive, Number 9 will easily handle our typical trains over the entire proposed main track from Sheepscoot to the crossing of Rt. 218 below Head Tide. Our organization does not own locomotive 9, and there is a certain lack of security in this fact. With the right of first refusal should the owner put the locomotive for sale, our organization should consider the importance and the logistics of being capable of meeting the selling price on short notice so as to avoid losing the locomotive, particularly considering its historic significance to our efforts and its operational importance.

For our present operation, and for most operations envisioned within this planning period, locomotives 9 and 10 will be sufficient to reliably provide steam motive power as desired. As we draw closer to completing the railroad expansion as proposed in this plan, develop operations on that portion, and make plans for expansions beyond this planning

period, consideration should be given to the reliance on these two locomotives and the suitability thereof to meet the evolving operational needs.

Some consideration has already been given to expanding the steam locomotive roster by building a replica of an original WW&F locomotive. There are some advantages to doing this, beyond filling an operational need. Given the uniqueness and scarcity of original equipment, replicating an original locomotive gives us an unparalleled opportunity to represent the original railway in a more complete fashion. The planning of such a project, followed by its execution, could draw considerable attention from the preservation community. This in turn would likely draw considerable interest, funds, and volunteers. The enthusiasm thus gained may serve to fill a void should volunteer interest wane with a lull or cessation of construction. Considering that the completion of such a project would likely be a decade or more after initial planning begins, and the need for another steam locomotive may exist toward the end of this planning period, a study of the feasibility and required resources for this project may proceed in the near future. It is important, however, that such effort in no way interferes with the goals and priorities of this planning period.

- **Heavy Service Mechanical Locomotives.** Diesel locomotive 52 presently provides power for all revenue and heavy non-revenue trains not powered by locomotive 10, which causes it to pull more than half of the total train-miles operated on our railroad each year. As with locomotive 10, locomotive 52 carries a disproportionately heavy burden and has yet to be entered into a regular maintenance cycle. This is largely because it has to be ready for service virtually 100% of the time, even as a backup for operation of locomotive 10. For these reasons, some relief is needed for locomotive 52.

The addition of locomotive 9 to the operating roster, allowing a greater dependence on steam, will ease both the use of locomotive 52 and its 100% backup status, allowing a scheduled maintenance cycle to be developed. Further, the addition of the model T railcar, currently under construction, will ease the use of locomotive 52 on non-steam passenger operations. The addition of another heavy mechanical locomotive may be considered should these other efforts prove insufficient. However, every effort should be made to solve this problem with the addition of historically appropriate equipment to the roster before modern equipment is considered.

- **Light service mechanical locomotives.** This includes small equipment incapable of safely handling trains of more than one car, including railcars and similar vehicles. With the exception of passenger railcars, which are designed for such service, light service mechanical locomotives are generally prohibited from powering revenue trains.

Locomotive 51 sees frequent and harsh service, considering its size, as the only locomotive presently in this class. The heavy use of locomotive 51 is related to the unavailability of locomotive 52 for non-revenue service, in turn depending on steam reliability. The addition of locomotive 9 and the railcar to the operating roster, as well as the handcars currently planned, will all aid to ease the burden on locomotive 51.

The railcar being built is a close copy of the SR&RL railcar, Number 2, currently owned by the Owls Head Transportation Museum. Its economical and single person operation, and its limited capacity, are ideal for off-season passenger operations, and for offering limited service beyond Alna Center. It will also serve non-revenue needs for maintenance and crew shuttling purposes. Being historically based, it is an ideal fit into our operation.

There has been consideration to building another model T railcar, one which would be a replica of one from the original WW&F Railway. The operational need and the feasibility of this should be considered as this planning period progresses.

## 2. Rolling Stock

- **General Discussion.** The amount of rolling stock owned is directly proportional to the growth of our operation, both because of operational needs and because our growth can sponsor and support the addition of more rolling stock. A general problem with adding to the rolling stock roster is that there is little available, thus forcing us to build cars to suit our needs. While this requires foresight so that the required planning and construction can be executed in a timely fashion, building our own equipment gives us the opportunity to be historically accurate.
- **Passenger Equipment.** The composition of our passenger equipment roster is based on a number of factors, the foremost being the ability to serve our ridership. Other factors include the security of possession of key pieces of equipment, the condition of equipment (which dictates major overhaul needs), maintenance rotation needs, specific operational needs such as handicap access, suitability for service such as cinder protection, and historical representation.

Presently our passenger equipment roster of three cars (flat 118, coach 3, and caboose 320) meets most, but not all, of the requirements listed above. However, flat 118 is not well suited for passenger service on steam trains due to lack of cinder protection, and caboose 320 provides limited window space for the passengers' visibility.

Coach 3 is plainly the best piece of equipment for passenger service in our roster. However, our lack of ownership presents a degree of uncertainty. The current lease arrangement would allow Maine Narrow Gauge (MNG) to reclaim the car upon two months notice. The car is in need of major framing reconstruction, which our organization has been reluctant to undertake given the nature of the lease agreement. Given the historical and operational value of this car, our organization should be prepared to purchase the car should MNG's position ever change. Further, in the spirit of general preservation regardless of ownership, some effort should be made to work out an arrangement that allows us to overhaul the car even if we cannot purchase it.

The possession arrangement and structural issues with coach 3, along with increasing ridership levels, are presenting a need to acquire or construct additional coaches. A generous member has donated the cost of the purchase of a coach from Edaville, and we have considered making more lease agreements with MNG. This is a reasonable partial solution if sound arrangements, such as those made for open car 103, can be made.

To provide a permanent solution, the Museum could construct replicas of original WW&F coaches. In addition to recreating another part of the original railway, this would attract considerable attention from the railway preservation community. Building replicas of coaches 5 and 6, the *Vassalboro* and *Taconnet*, would be well within our capability, as they are smaller than coach 3, making them more feasible to build. Further, the *Taconnet* replica, a combination passenger/RPO/baggage car, would give us easy handicap access and allow us to develop historical programs displaying different types of original WW&F operations, such as the railway post office operation.

Consideration should also be given to purchasing additional equipment when possible. Efforts should be made to obtain equipment that best suits our needs and fits into our historical atmosphere.

- **Non-Revenue Rolling Stock.** Only flat 118 can fit into this category presently, and only as a dual-service car, as it also serves in revenue operations. The need for our only flatcar in work train service is great, and has far exceeded the capacity of a single car. To this end, the Museum currently plans to convert a recently-acquired open car (not 103) into a second flatcar. As with 118, this flat car will provide dual service.

Consideration has also been given to constructing a hopper car for the sole purpose of hauling gravel and ballast for construction work. The limited use of such a car makes it a less attractive project. However, as the need grows, this project should at least remain in consideration. It would be built to a Portland Company design that was never originally built, allowing us to show more of the unique and lesser known history of the original railway.

- **Rolling Stock Maintenance.** Programs should be developed to ensure the safety and longevity of our rolling stock. This issue demands particular attention because all of our cars are constructed of wood. Inspection cycles and painting schedules should be established for each piece of equipment. Time and money should be appropriated for the refurbishment of our wooden equipment, such as re-decking the flatcar and re-siding the caboose when necessary. Attention should be paid toward signs of rot and other deterioration, and methods to stop the spread of the same once they are identified.

### 3. **Maintenance of Way Equipment**

Our serviceable maintenance of way equipment currently consists of a number of four-wheeled cars of various weights. The variety is helpful, as some cars are light enough to be lifted clear of the track to allow trains to pass, while others are suitable for heavy duty work. Included in this roster is an air compressor used for air tampers, a portable welder for welded build up and other repairs, and other equipment requiring small work cars for transportation.

During several work sessions, we have used air-powered tampers. These provide far quicker and better results than any other tamping method we have tried. Currently, we rent these for the work weekends. However, we are hoping to obtain some by donation within the coming year. The Museum should consider purchasing new units outright should other efforts prove fruitless.

We currently have a derrick car in our possession awaiting conversion to two-foot gauge, and a hand pump car under construction. A velocipede is planned, as is a small work car to be devoted to the air compressor.

### 4. **Non-railroad Equipment.**

The W-2 front end loader is presently our only non-railroad equipment. Its main function of loading stone onto the flatcar is a vital one. However, it has proven unreliable in the past, and as a result has been a liability, putting a large amount of free labor at risk. It is cumbersome to operate, not particularly road worthy, and cannot be transported easily, thereby limiting its use to Sheepscot Station. Consideration may be given to replacing this unit with a machine more capable of meeting some of the aforementioned requirements.

We should also consider obtaining some heavy equipment such as a bulldozer or an excavator, and attracting an operator as a volunteer. Such a machine, along with a capable and willing volunteer, could save the organization considerable cash outlay in preparing the original roadbed for new track.

The acquisition of any of this equipment may be made practical for our organization by capitalizing on our broad resources within the membership and other connections. The purchase of new or used equipment at a reduced rate by our non-profit organization, or the outright donation of equipment, should be sought.

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## Section 4 **Financial**

### ***Executive Summary***

Every activity of the Museum impacts or is impacted by financial considerations. In this section we examine the following financial considerations:

1. **Sources of Funds:** The Museum should expect income from ticket sales, the Museum Store, and donation box receipts to cover the expense of operations. Life memberships should be a higher multiple of annual memberships, and that income should not be used as current revenue. Grants and endowment growth must be pursued.
2. **Use of Funds:** Operations, capital improvements, tools, maintenance, member services, and fixed expenses must all be carefully considered.
3. **Financial Management:** The Museum is now a sizeable operation and needs far more sophisticated accounting and budgeting systems than presently used.
4. **A Financial Development Committee:** We recommend that a financial development committee be appointed to advise the directors on financial matters and manage fund raising activities

### ***Detailed Discussion***

#### **1. Sources of funds**

- **Operations:** The Museum should expect income from operations to cover the expense of operations. To achieve this equilibrium, the cost of services provided – train rides – should be covered by operating revenue which comes from three sources.

**Ticket sales** will continue to be the major source of income from the general public. Ticket prices should be adjusted periodically as the ride grows longer. Past experience has shown that demand is relatively inelastic in relation to price, e.g., when people come to ride, the price does not affect whether tickets are purchased. Past efforts to use discount coupons as a means of attracting riders, and as a means of tracking advertising effectiveness, have produced few results, indicating that price is likely not a primary consideration. Efforts to increase visitor count, and thus ticket sales, will become more important every year.

**Museum Store net income** has risen to rival income from ticket sales, but will likely trail ticket income in the future. Museum Store sales, at least of major items such as books, are more to rail fans than to the general public except for souvenir items such as tee shirts and caps. Floor space allocated to the Museum Store should be increased so that more products can be carried. Except for souvenir items, markups and selling prices are limited. Books, for example, are available from many sources, so the industry sets pricing. People pretty much know what a shirt should cost. An internet presence for the full store should be considered, as this has been shown to be a cost-effective method of increasing sales. According to some studies, there is a potential of tripling sales.

**Donation box receipts** are an operating income item since money left in the box comes from visitors. When anyone makes a major donation while visiting, that donation is separately accounted for; one donation of a thousand dollars in cash occurred in the recent past. Making the donation box more prominent with a small display could enhance revenue from this source. For an example, see the donation box display in the Acadia National Park visitor center.

- **Membership:** Museum members will continue to be a major source of revenue for building and maintaining the Museum. Again, here we are dealing with a very finite population, and at some point we will reach a point of relatively slow growth. Continuing membership will be composed primarily of rail fans and history buffs.

**Life membership** should continue to grow, although slowly. In the past it has been attractive because of the relatively low ratio of annual to life price. This ratio should be changed so that the life membership rate has a higher ratio to the annual rate. There should be increased member benefits for life members to make life membership more attractive. Since a life membership payment is a one-time income item, that payment should not be used as current revenue in the general fund, but should be held in a separate fund to be slowly amortized.

**Annual membership** is an ongoing current income source. We should assume that the number of annual members will grow at a somewhat slower rate as time passes. Revenue from this source should grow at a steady rate if rates and classes of annual membership are adjusted. Member benefits other than reduced ticket prices, such as store discounts, should also be considered.

- **Gifts:** Gifts are the largest single source of income for the Museum. Primarily, they have been and will be from members, especially life members. We can expect gifts from members to increase proportionally to the number of members and inflation.

**Annual fund raising** should be continued in essentially its present form. It is important that since funds raised are intended to be used for capital projects, the allocation of funds raised be explicitly stated, either in dollars or percentages, and the funds raised be encumbered for those projects. Encumbering of funds raised for capital projects will become more important to be true to the wishes of the donors. If it is expected that any funds will be used for other than capital projects, that should be so stated in the fund raising letter. Annual fund raising should also offer the donor an opportunity to designate that the entire gift go to one of the enumerated projects. For example, if one of the goals is to raise \$4000 for a coal shed and someone designates their \$2000 donation for that project, the \$4000 goal for that project is half met, and other un-designated gifts are distributed proportionally.

**Special fund raising** should be used when appropriate for major projects, such as has been done for the restoration of #9. In these cases, donors other than the Museum membership should be solicited. When appropriate, other organizations can become involved. Right-of-way restoration might involve conservation groups. Historic equipment might involve an organization with an interest in the particular type of equipment.

**Grants** must be pursued. There are almost unlimited sources of grant money, sometimes never tapped. Most foundations are now required by federal tax law to disburse a portion of their assets every year. In the past, the Museum has received some grant money, most notably from the Amherst Railroad Society. After a grant application a few years ago, a \$1000 unrestricted grant was received from a foundation in New York. Now that the Museum has proven itself as a well run and growing organization, it will be looked upon favorably in response to a well written grant. The importance of well written grants cannot be overemphasized.

**Endowment growth** must be pursued to ensure the long term financial health of the Museum. Since the founding of the endowment, it has grown slowly. Major effort should be made to increase the endowment to the point where it can make a significant contribution to the Museum each year. The Museum should encourage members to include the Museum in their estate planning. Although more often used by colleges and universities, life income annuities should be considered as they offer very attractive tax benefits to the donor and significant income to the recipient.

## 2. Uses of funds

- **Operations:** Covering the costs of train operations from operations revenue must be a goal to be achieved in the short to medium term. By this, we mean train operations for the general public. Train operations for teaching (school group visits, etc.) do not come under this, they are part of the Museum's teaching mission. Several categories of expenses should be charged to operations.

**Fuel for locomotives** is an operating expense for train rides. Coal in the coal shed is an asset, but becomes an expense when burned hauling passengers. This expense must be reasonably allocated in order to determine train ride expenses.

**Routine Maintenance** of equipment, such as lubricants, brake work on passenger equipment, and the like should be charged to operations.

**Supplies** such as tickets and any handouts which might be produced are operations expenses.

**Marketing expenses**, since they are primarily designed to attract the general public, are an expense of operating trains for the general public. Some marketing, such as the Official Business Directional Signs, are a general expense.

**Payroll** for employees involved in operations and services for the public will have to be charged to operations as soon as the Museum has paid employees.

- **Capital Improvements:** Capital improvements are the largest consumer of Museum funds. Management of them will take the largest amount of directors' efforts, volunteer resources, and money for at least the next decade. Accounting for this work will have to be upgraded, if for no other reason than to know the value of the various assets, particularly for insurance purposes.

**Buildings and other structures** will be added to the Museum during the foreseeable future and will require considerable funds. Preparations are currently underway to construct a water tower. At some not too distant time, a car shop must be erected to provide inside storage. The car shop is a prime candidate for a special fund raising effort. The museum must carefully plan the fund raising for any major building project and account for the costs during the project.

**Rolling stock additions** will be needed to support increased passenger traffic, construction operations, and presentation of historic railroad activity and equipment. Whether built from scratch in-house, purchased in good condition, or purchased and renovated, the costs can be considerable. As mentioned in the Equipment section, the opportunities to purchase historic equipment often arise on short notice; thus the Museum should consider growing a reserve fund to be prepared for purchase opportunities when they arise.

When major overhaul is done on a piece of rolling stock, that work should be treated as a capital improvement if it increases the value above what we are carrying on the books. This would most likely occur on a car purchased and then improved. Since non-profit organizations do not depreciate capital assets for book purposes, most work is considered maintenance. Examples: A new deck on flat car #118 would be considered maintenance since it would not increase the car's value; purchasing a run-down car and then rebuilding it would have the rebuilding cost treated as a capital improvement; major improvements on a leased car would be treated as a leasehold improvement and classified as a maintenance expense associated with that car.

**Right of way expansion and improvements**, laying track, etc. are all capital improvements. Adding a track switch is likewise. All of these should be planned and budgeted.

- **Tools:** As does most any industrial organization, the Museum is acquiring a significant inventory of tools. We must continuously purchase tools, primarily for the machine shop, but also for other purposes. The Museum should "have a handle" on how much is being spent in this important area so it can be budgeted. Since the dollars expended in this area can be significant, the expense should be explicitly shown on financial reports. Categorization of tool expense should be in broad groupings, *e.g.*, machine shop, hand tools. In addition, we should have a recorded inventory of tools, both those purchased and those donated.
- **Maintenance:** Everything needs maintenance. It is tempting, but not advisable, to lump all maintenance expenses into one big pot. Some maintenance expenses are relatively small, but all should be allocated to specific categories in order that the Museum knows with some detail where the money is going. Routine day-to-day maintenance expenses are relatively small expenses, but in a year they add up. Larger items, new brake shoes for example, should be accounted for separately, but they are not capital expenses. The following is proposed as a set of guidelines.

**Supplies** that are used in small quantities as needed should be lumped together. This would cover everything from some nails to gasoline to chain oil to scratch paper. Any items that have an insignificant cost should be treated in this way.

**Building maintenance expenses** should be charged to the building involved. Only by knowing the costs can decisions be made on when to do major work to reduce maintenance.

**Locomotives** can involve major maintenance costs. Every such expense should be charged against the engine involved.

**Rolling stock** can involve large and small maintenance expenses. It is probably best to, at the most, separate expenses between passenger cars and freight cars. Such things as journal packing and oil are simply supplies for the operating department, not maintenance.

- **Member Services:** These expenses must be separately accounted to satisfy certain Internal Revenue Service requirements.

**Newsletter publication** involves printing and postage expenses, each of which should be accounted separately. The Museum should soon consider obtaining a non-profit mailing permit and use standard mail to mail the newsletter. Standard

mail (which includes what was once third class, fourth class, and bulk mail) will reduce the cost of mailing each piece by over 50%. As a bonus, each piece can weigh up to 3.3 ounces rather than the current limit of one ounce. Standard mail will require special sorting which is impractical to do manually for our 1000 piece mailings, but is relatively easy with appropriate software that has been written by one of our members, or which can be purchased. The annual savings would be close to \$1000.00.

**Ticket discounts** are a member service, but are not a service under the tax code. They need not be accounted for separately since they can be found in the ticket sales reports.

**Museum Store discounts**, should we eventually offer them, likewise need no separate accounting since they will be obtainable from the Museum Store accounting.

- **Fixed Expenses:** This covers several well-defined categories, including insurance, electricity, heating fuel, and administrative expenses such as bank and filing fees. For the Museum, it is probably not worthwhile to allocate them to a particular department or activity. However, there is one exception, which is leases; they should be broken down by individual lease, as the payments for each lease should appear separately on fund statements.

In addition to leases on locomotive #9, coach 3, box car 309, and excursion car 103, we have a mortgage on the Percival purchase (ends 2007) and the Boudin purchase (ends 2019).

### 3. Financial Management

The Museum's tax return for 2003 showed revenue of \$109,868, expenses of \$51,465, and assets of \$464,803. By any measure the Museum is a sizeable operation and has grown to the point where careful and detailed financial management has become mandatory. The availability of detailed financial information will become a basis for business decisions. The major considerations are outlined below.

- **Accounting and Budgeting:** Accounting for the Museum will require the use of more sophisticated systems than in the past. Detailed records will allow the Museum, particularly the directors, to have a better understanding of what is happening. We have always known "where we are at" but not, in any detail, "how we got there." Manually prepared spreadsheets, whether with pencil or a computer keyboard, have become inadequate to meet our needs. As a 501(c)(3) organization, the Museum is in many ways a public entity and is large enough that Generally Accepted Accounting Practices (GAAP) should be followed.

Without a good accounting system, we could face a situation where funds allocated for a specific project were not obligated to that project. Without an accounting system that supports such project funding obligation, money in the bank would be considered a pool to be used for whatever bills are in hand or for projects viewed as "to be done now." This would later bring about a situation of, "We voted to spend money for such-and-such, but we don't have the cash anymore." Obligating funds when voted would at least make such conditions obvious very early on, and maybe prevent them from occurring. (The museum owes it to donors to be extremely careful in this regard. Under Maine law, our books are open to any member with a

reasonable interest. Having donated money for any specific purpose would likely create that reasonable interest.)

As soon as the Museum receives its first significant grant, careful grant management and reporting will be required by the granting foundation as a condition of the grant. In some cases, the granting foundation may require that such facilities be in place in order to be considered for the grant. The accounting system must have this capability.

The Museum's accounting system should provide for fixed asset accounting. Since a non-profit does not depreciate fixed assets, this is an easy requirement to satisfy with most accounting software packages. A current list of fixed assets is useful for many purposes, not the least of which is working with insurance carriers.

"Funds Accounting" is the variation of general ledger accounting used by non-profit organizations. There are accounting systems specifically designed for this application. Higher end (well above Quick Books® and the like) accounting packages can be used for funds accounting by tailoring the chart of accounts.

In addition, budgeting should be handled as part of the accounting system so that budget reports become a byproduct of that system. This will allow whatever analysis is needed to be produced readily.

Good accounting systems provide a myriad of reporting facilities and analysis tools. With modern accounting systems, preparation of tax returns and any reports required by regulatory bodies becomes easy. For example, preparation of the annual federal 990 return becomes at the most a half-day job from sitting down to mailing the return.

- **Grant Management:** This has been addressed above. Suffice to say here that any money received for a specific purpose must always be obligated and on hand until it is used for the intended purpose.
- **Special Funds:** Here we address donations made – money received – earmarked by the giver to be used for a specific purpose. We differentiate these donations from money received as a result of the annual fund raiser where the solicitation outlines the intended uses. This can include small grants such as those which have been received from the Amherst Railroad Society. An example would be someone donating a sum to be used to build a water tower. Each such "fund" must be accounted for separately, but the monies can be commingled. A good practice is to segregate the money into an interest-bearing account, and each time interest is earned, allocating the interest proportionately to the included funds. This accomplishes two things: the money is "physically" separated from other funds, and until it is spent, it grows.
- **Life Membership Fund:** Payments received for life memberships should not be treated as current general fund revenue. Unlike annual memberships, that member will not be providing a steady stream of annual payments. All payments should go into a "Life Membership Fund." That fund should be segregated and earning income. It should be drawn down a little bit each year to provide a general fund revenue stream somewhat as if the life members were paying an annual membership renewal.

At the very least, the fund should be in bank certificates of deposit. It is not unreasonable for it to be in a conservative no-load mutual fund.

- **Endowment:** The endowment has grown from a modest \$1000 donation at the 2002 annual meeting to over \$5000 a year later and now to well over \$10,000. Thus far it has been deposited in a money market fund for which an insurance company's administration charges have pretty much wiped out any income. Even if it were in a local bank's certificate of deposit, it would have earned 3.5% or more.

The endowment should be invested primarily in equities. By far, the best vehicles for achieving the desired ends with reasonable security are no-load mutual funds, of which there are many good ones. The endowment is there for the long term. If equities have a bad year and the endowment loses some value, it is not a tragedy. Over the long term – and the WW&F Museum is itself a long term investment – equity in the United States has grown at over ten percent each year. At that rate, the initial \$1000 donation would have earned \$331 by the 2005 annual meeting!

The endowment should be invested more aggressively in order to provide income to the Museum. We recommend that the management of the Endowment be entrusted to the Financial Committee described below in order that its intended purpose be achieved.

#### **4. Financial (Development) Committee**

We recommend that a financial development committee be appointed. That committee would have several duties. It should be composed of members with either strong finance, strong accounting, or strong fund raising backgrounds. The ideal size for the committee would be three people, with a maximum size of five. Its duties would be to advise the directors on financial matters and manage fund raising activities. Some specifics are as follows.

- Provide general money management and accounting advice to the directors and the treasurer.
- Research as necessary and propose specific investment policies for approval by the directors.
- On an ongoing schedule, monitor money management and investment results and whenever appropriate make recommendations for changes.
- Work with the directors to develop the annual fund raising appeal.
- When a major project is proposed, develop a method of raising funds for that project and prepare the tools for carrying out the fund raising.
- Create estate planning suggestions for members. Investigate creating estate planning vehicles such as life income annuities which would benefit both the donor and the Museum.
- Determine the investment policy for the endowment.
- Actively pursue grants for the Museum, particularly from foundations.

#### **5. Conclusion**

This section covers much ground. It reflects that the Museum has come a long way from its humble beginnings with the vision of Harry Percival and a small handful of people who shared that vision and wielded axes and saws to clear a bit of the old right of way.

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## Section 5

### Marketing and Presentation

#### **Executive Summary**

Marketing encompasses all efforts to bring the Museum to the attention of the general public, rail fans, and historians. As an extension, it involves carrying out the teaching responsibility which, by definition, is a necessary part of a museum's mission. Presentation encompasses what the Museum presents to the public once they arrive on the grounds.

Here we are proposing a broader marketing and presentation program, designed to market the Museum rather than to simply advertise. The proposal is divided into a number of broad areas:

1. **Advertising:** Given the limited funds available, print advertising should be targeted to specific audiences and keyed to specific events. That advertising should cover a larger market, particularly Augusta, Bangor, and Portland.
2. **Exhibits:** Exhibiting at train shows and travel shows should become an integral part of marketing efforts, and we should improve our exhibit.
3. **Docent Program / Tour Guide:** Over the course of this coming summer, we propose that a scripted tour guide program be developed to unify the information presented to the public and to guide them safely about the premises.
4. **Interpretive Displays:** Over the course of this coming summer, we propose the construction of an information kiosk and interpretive signage for the benefit of all visitors, but especially for the benefit of those visitors who arrive when the Museum is closed. During 2006, we propose the beautification of the grounds and the construction of safe and comfortable walkways around the shop building.
5. **Publications and Handouts:** Over the course of this coming summer, we propose the creation of a handout for visitors that will show them the layout of the yard and other detailed information about the railroad not found in the color brochure. Copies should be placed in the kiosk mentioned above.
6. **Presentation Programs:** Over the next two years, we should improve the train show display, donate *Two Feet to Tidewater* and our video to local libraries, and create up-to-date, scripted WW&F presentations for both computer and slide-projection use. These presentations should be shown to local groups and copies made for member presentation to out-of-state groups.
7. **Educational Outreach:** Education is a large part of our mission, and we should bring the PowerPoint/slide presentation to local schools and host school tours.
8. **Resources:** Marketing and presentation must be developed within the constraints of a firm budget.

## **Detailed Discussion**

### **1. Advertising**

**Newspapers, Magazines, and Signs:** Past advertising efforts have been confined primarily to print advertising in local newspapers during the summer, radio advertising during the summer of 2002, and brochure distribution in Maine Tourism visitor centers. For two years, the Publicity Committee has placed a one-inch ad in *Trains Magazine* for six months each year. The two Official Business Directional Signs (OBDS) on Route 1 in Newcastle, and the others on Sheepscoot and Alna roads, have brought more visitors than any other program.

Given the limited funds available, print advertising should be targeted to specific audiences and keyed to specific events. Heavy reliance on local (Lincoln and Sagadahoc county) newspapers has not shown good return for the investment. Newspaper print advertising should be event-keyed, and should cover a larger market, particularly Augusta, Bangor, and Portland. Special newspaper travel supplements should be considered in these papers. Advertising in Boston and New York newspapers should also be considered.

**Brochures:** Brochure distribution should be expanded, and the brochure should be updated at least every other year, possibly every year, in order to keep it current and to present a new image to those who pick them up.

**Press Releases:** Press releases should be used to the maximum possible extent, carefully written and sent to as many outlets as might use them. As an extension of this, newspaper and television outlets should be cultivated so that they will cover significant Museum events. National magazines often use articles written by freelance writers; this means of publicizing the Museum should be pursued.

**Travel Guides:** Inclusion in travel guides has the potential for bringing in a new population of visitors. (The Publicity Committee is now working on inclusion in the AAA travel guide for 2006.)

**Bus Tours:** Upon the completion of the improvements for visitor comfort such as rest rooms, improved parking, and walking paths, a concerted effort should be made to have the Museum become a stop for bus tours. Success in this area will also hinge on having train operations on other than Saturday and Sunday. An expanded operating schedule from mid-June through September would likely result in a directly proportional increase in ticket sales and a significant increase in Museum Store sales.

### **2. Exhibits**

Exhibiting at train shows and travel shows should become an integral part of marketing efforts. Particularly in the case of travel shows, a professional-appearing exhibit is an absolute requirement. In contrast, our present exhibit consists of two or three tables, with the TV/VCR continuously playing "the video," a rack of books, shirts laid out for display, brochures placed around the merchandise, and a sign with peeling letters that hangs at an angle over our table. A good exhibit should be created in the immediate future for use in both of these venues. We recommend that efforts to revamp the show display begin this year; the Publicity Committee has already allocated funds to do so. Selection of when and where to exhibit should be done with an eye on maximum impact

and return on the costs involved. Exhibiting at travel shows will bring the Museum to the attention of a broader slice of the traveling public.

### **3. Docent Program/Tour Guide**

The Museum does not currently have a formal docent or tour guide program. Tours are informal, sometimes with a volunteer showing people around, and sometimes without. This informality involves some risks, such as people tripping over obstacles or damaging Museum possessions. Further, the information presented varies considerably.

Establishing a tour guide program, with accompanying guideline scripts, will unify the information presented to the public as well as alert them to possible tripping hazards and ensure that no one damages Museum property. Over the summer of 2005, someone should be assigned the task of creating the script.

### **4. Interpretive Displays**

The Museum has very few displays outside of the freight shed, and thus there are very few ways for visitors to find out who or what we are when the Museum is closed. In the early years of the Museum, there was an information kiosk that contained newsletters, brochures, and announcements. The kiosk should be revived, and rebuilt on the side of the engine house facing the parking lot, so that off-hours visitors can obtain information. Brochures and an informative handout (see below) would be put in this kiosk. It probably can be constructed for minimal cost. We recommend constructing this in 2005.

Interpretive signs should be placed around the Sheepscoot Station area. These, too, were found in the early years of the Museum, such as in front of the station and by the first boiler shell culvert. These signs would serve as a self-guided tour during off hours. Signs should be put on the large doors at the rear of the engine house in such a way that whether the doors are open or closed, people can read the signs without interfering with railway operations. We recommend constructing this in 2005.

Walking across the grounds of the Museum can be difficult even for people who have no physical problems. With the removal of the stone storage to Alna Center and the removal of junk, coal, and wood storage to other locations, the parking lot should be landscaped and kept neat. For ease of walking, a path built of compacted sand or pressure-treated lumber should be constructed around the shop building and alongside one track toward the north end of the yard. Track crossings should be at least ten feet from the engine house doors, partially to allow time for train activity to be noticed and partially to discourage casual investigation. We recommend constructing this in 2006.

### **5. Publications & Handouts**

The Museum has no visitor handouts that show the layout of the yard or other railroad information beyond that found in the color brochure. A handout can be an excellent tool, as discovered several years ago by volunteers who went to Colorado and found a large handout at the Antonito, Colorado and Chama, New Mexico yards. We recommend creating this in 2005, and putting it in the information kiosk (see above).

### **6. Presentation Programs**

The presentation of the Museum to the outside world has a spotty history at best. Our method of “taking our show on the road” still relies on slides and an off-the-cuff speech.

Clearly this must change if the Museum is to become more professional in getting our message out.

Face-to-face presentations about the Museum to various groups have happened for many years, thanks to Harry Percival and his slide show. This slide show still exists in its entirety, although other volunteers have created their own slide shows from their own excellent photos. During 2005 and 2006, an up-to-date presentation should be developed, both for the computer (PowerPoint presentations) and for slides, with a script developed for it. This presentation should last no longer than 30 to 40 minutes, thus allowing time at the end of an hour program for questions. The electronic presentation can be made available to anybody that wants it for the price of mailing a CD or downloading a file.

Upon completion of this presentation (estimated in 2006), a concentrated effort should begin to visit every civic and historical group located on or near the railroad corridor that will let us show our presentation: Granges, Masons, Lions Clubs, Rotary Clubs, and historical societies to name a few. Additionally, we can encourage members and friends all over the country to do the same. By this, we raise awareness about us to influential groups, who may someday provide us with donations, services, or members.

Libraries in towns along the railroad line, and to either side of it, should be visited to find out what they have for information about the WW&F. Arrangements should be made for these libraries to have, at the very least, the *Two Foot to Tidewater* reprint, and the WW&F video created by Cole & Company. Information should also be left with the librarians about the Museum for their future reference. We recommend that this begin in 2005, and anticipate that it may take two years to complete.

#### **7. Educational Outreach**

A large part of our mission is education. This began in approximately 1999 with the first school tour to the nascent Sheepsfoot station site. As far as can be ascertained, school tours are currently the only way we look to educate schoolchildren, and this is usually only done during the late spring. The presentation (PowerPoint or slide show) created above by 2006 could be brought to schools as a heretofore untapped educational opportunity, during seasons when the railroad typically doesn't operate. At some point it will become necessary to produce print material to support the Museum's teaching efforts.

#### **8. Resources**

Marketing and presentation must be developed within the constraints of a firm budget. Working within a fixed dollar budget and allocating the funds where they will produce maximum return will be advisable for the foreseeable future. Personnel will be needed from time to time to carry out a successful marketing program. This work is no less important to the Museum than spiking rail and running trains.

#### **9. Keeping It All Up-to-date**

All aspects presented here will need periodic review and updating, to keep all information fresh and relevant.

## Section 6      Personnel

### ***Executive Summary***

The labor needs of the WW&F Railway Museum are discussed here in three sections; a summary of each of these is given below.

1. **General Needs:** The labor required to build and operate our railroad, along with the associated preservation, public interface, and clerical needs, is tremendous and can only be met with a large and active volunteer core.
2. **Volunteer Labor:** As our success will always depend upon volunteer labor, we must constantly attract volunteers and expand our volunteer program. Efficient use of volunteers, while maintaining their enjoyment level, is crucial to meeting our goals. The utmost regard and consideration should be given to preserving the volunteer culture within the present day WW&F Railway.
3. **Compensated Labor:** The organization should at some point hire an employee, who could help ease workload congestion in several areas and would allow smoother growth for the Museum. Many important tasks that are currently being deferred out of necessity, such as equipment maintenance and presentation of our facility, could be given attention. The utmost care should be given to reduce the impact of this action on the organization as a whole, including volunteer relations, finances, and membership opinion.

### ***Detailed Discussion***

#### **1. General Needs**

The successful operation of the WW&F as outlined in this plan places certain requirements on the use of labor which are identified below.

- **Labor Requirements.** Our organization's goals to restore and operate the WW&F are ambitious and encompass more areas of activity than the average preserved railroad operation. The labor required is great and requires an active membership. In 2004, 158 volunteers worked for just under 12,600 hours, and our membership grew to over 1000. With over 15% of our membership actively volunteering, the interest and support of the members allows our operation to succeed. As our organization grows, so will our infrastructure and operation, along with the associated labor needs. The very growth of the organization means more equipment construction and restoration projects, more track construction plans, more buildings, and more capital improvement efforts. This growth can only be achieved if our labor pool continues to increase and is used more efficiently.

The range of skills necessary to meet the various needs of the organization includes clerical, customer interface, carpentry, machining, engineering, train operation, general labor in a team environment, forestry, marketing, and many other trades. The people who offer these skills take part in a friendly atmosphere of compromise with their fellow volunteers, which is not always an easy feat with so many people and their potentially opposing opinions.

- **Personnel Utilization.** The efficiency of our work atmosphere has two important effects on our success. First, efficient use of personnel represents the best use of resources, which we are duty-bound to achieve since the major source of our re-

sources is the generosity of our membership. Effectively utilizing the individual skills of the available help is a key factor in keeping up with the work load. Secondly, volunteers offer their labor of their own free will and therefore want to work. When volunteers feel underutilized, many feel under-appreciated; the associated discouragement turns them away from helping us in the future. For this reason, individual volunteers should be brought into our work culture in a manner that best recognizes and utilizes their skills. With so many individuals, and so many projects with similar urgency, it is often difficult to do this, but it is a vital part of our personnel relations.

- **Personnel Coordination.** Presently, there is no established method to coordinate the work required on a given day and to assemble the crews required. While the available labor is usually divided appropriately according to the wishes of the individual volunteers and the needs of the foremen, there are times when this division of labor is moderately competitive and can turn contentious. Also, with no particular method for labor allocation, new volunteers are often left not knowing what to do, what crew to join, or, as is often the case, even whom they could talk with to find out.
- **Meeting Operational Demands.** To date, the WW&F has been an all-volunteer organization. This arrangement has been very successful in meeting our goals, operating the railway, and bringing our organization to the respectable position it currently enjoys. As an all-volunteer organization, however, our work is usually short-term project oriented. This is by necessity, as the available labor is usually concentrated on weekends and is focused on the most pressing projects. Thus, routine needs such as the cleanliness of the grounds and long term projects such as operational development are often deferred or unmet entirely. While a focus on short term goals, such as track construction or the restoration of a piece of equipment, enables great and impressive progress in those areas, the associated lack of attention to other needs builds to the point where they become inhibiting.

Examples of these other needs include: following a routine equipment maintenance schedule, maintaining the shop and grounds in a presentable condition, developing training programs, preparing crew schedules, doing other operational management tasks, handling visitor interface, and dealing with other issues.

While the core of volunteers will always remain vital to our success, the organization may consider hiring one or more paid employees to fulfill some of these needs. As certain details of our operation get deferred further, the success of our organization as a whole will certainly suffer.

## 2. Volunteer Labor

- **Importance and Role of Volunteer Labor.** The continued use and expansion of our volunteer labor pool is of vital importance for two separate but related reasons:
  1. The large volunteer personnel pool provides a tremendous amount of labor. The level of personnel required to not only construct a railroad and the entire associated infrastructure, but to operate it historically concurrent to the construction efforts, is substantial and, given the financial resources of the organization, can only be met with free labor.
  2. A culture has been developed along with the volunteer core. This culture is based upon friendships, mutual appreciation of the railway and its purpose, and mutual agreement to reach goals. This culture is important, as it attracts new people to

become a part of it, and keeps volunteers invested in our purpose. Without this culture, our organization would most likely be unable to maintain the levels of volunteer labor necessary to meet our goals. While the organization cannot control or direct this culture, it can and should promote the well-being of that culture.

- **Enjoyment of Volunteering.** Many volunteers have expressed their appreciation for the informality and lack of pressure surrounding our work, particularly in contrast to their professional careers. This informality comes both from the volunteer nature of the organization and its relatively small size. Our commitment to provide a service to both the public and our membership places requirements on us, however, because we have responsibilities for so many volunteers. While these commitments and responsibilities undermine the informality of volunteering for some, they can still be met in an enjoyable way if handled properly. We should be careful to not force excessive responsibility upon volunteers who do not wish it, while giving responsibility to those who are willing and able to assume it.
- **Volunteer Coordination.** The management of our volunteers presently consists of leadership by project and departmental foremen. This system functions well, as it allows individuals to become very familiar and experienced within their own areas of interest, and allows them to become good leaders of other volunteers. This is done with the spirit of compromise and cooperation, generally with foreman who don't try to remain above, or show authority over, those with whom they are working.

However, as previously discussed, there is a distinct lack of coordination methods. For the betterment of the volunteer culture and the efficiency of work performance, the Committee recommends the selection of a "volunteer coordinator" who would maintain a list of projects and to whom volunteers (especially first-timers) could go for task suggestions. It may be prudent to also establish an official volunteer program that would coordinate projects and labor, and help to administer the general priorities of the organization. The program should also organize a volunteer campaign to actively attract new volunteers and should develop a volunteer appreciation program. The program may be organized as a committee led by the volunteer coordinator.

### 3. **Compensated Labor**

- **Need for Compensated Labor.** Compensated labor, available for work on a frequent and regular basis, could pay specific attention to activities, functions, and projects that cannot be consistently handled with volunteer labor. While the need exists now, the financial means do not. As soon as financially feasible, however, consideration should be given to hiring an employee to perform the functions outlined below.
- **Potential Functions.** An employee could solve mounting operational problems and develop long term and capital improvement projects that have been beyond the reach of our currently available labor. The operational problems include equipment maintenance needs, grounds and shop maintenance, and shop and railroad operation management. Projects such as switch construction, car and wheel-truck construction, and facility improvements could be given more attention than is presently possible. Further, compensated labor could allow limited train operations at non-regular times, develop special railroad operations, facilitate peripheral operations, and generally advance many of our other goals.

An employee could also be advantageous in the Museum Store and/or in a clerical role. This would allow the store to be open other than on weekends. While trains might not be running, a person would be present to host visitors, guide them through our premises, and promote our cause to an audience that may otherwise go untapped.

- **Relation between Volunteer and Compensated Personnel.** Should the organization choose to hire help, it is imperative that attention be given to the relationship between the compensated labor and the volunteers. There are a number of potential points of contention between these groups. Some volunteers may feel that it is not fair to compensate some people and not others. Also, a paid employee may feel his or her job is at jeopardy when free labor may take it over at any point.

These and other concerns can be minimized or avoided if a positive atmosphere is established around the compensated help. Employees should be carefully chosen to ensure that the volunteer core supports those people, and they are devoted to the same organizational goals as everyone else, thereby ensuring an investment of personal interest in their work. Further, employees should encourage volunteerism and promote it in all aspects possible; co-working with volunteers toward the same goals connects people in positive ways. Employees must realize that volunteers are one of the most important resources our organization has, and they must be generally favored whenever possible.

- **Potential Employment Arrangement.** The employment arrangement should be carefully constructed to match the financial, labor, and volunteer relations requirements of the organization. An initial arrangement may be tried for a trial period, which may include a limited number of hours at a pay rate that is somewhat less than what is ultimately envisioned. The trial period could be used to measure the advantages gained from compensated help while minimizing the financial impact to the organization. If the trial were successful, the hours and wages may be increased to more accurately reflect the actual needs of the position. If the trial shows a less than anticipated result, the trial period arrangement could be continued or the paid employment program may be eliminated altogether. Such a trial should only be entered if both the organization and the employee were fully aware and willing.

- **Funding.** As the organization grows, its financial requirements and associated restraints grow. However, the longer we go without a paid employee, the longer we defer some of the tasks and issues for which a paid employee is needed, which creates an ever increasing need for compensated labor.

When budgeting the annual expense for a paid employee, all associated costs should be included. These include employer's Social Security and Medicare tax, workers' compensation insurance, fringe benefits such as accident and health insurance, reimbursement for travel and the like, vacation pay, and possibly retirement contributions.

The presentation and accomplishments of the organization should improve with the addition of compensated labor; this in turn should draw more money from the membership and even draw attention from grant donors. The funding of a paid employee may be divided to reduce the impact on the current finances of the organization. Three-way funding may be considered, whereby one third of the required funding is met through capital fund raising that includes a labor cost for the project; and another third met by income development directly attributable to the addition of the employee, either through operations or from the membership. Thus, only one third of the burden of paying an employee is left to the current finances of the organization.

## Section 7 Membership and Ridership

### *Executive Summary*

The Membership and Ridership section is divided into three subsections:

1. **Membership levels and fees.** We should consider expanding our membership levels to include Family Memberships.
2. **Ticket prices.** Current ticket prices should remain unchanged until our track mileage increases.
3. **Membership and Ridership Growth.** The Museum should be ready for an increase in membership and ridership levels.

### *Detailed Discussion*

#### 1. Membership Levels and Fees

The Museum recently passed the 1000-member mark, which gives the Museum the largest membership of any Maine two-foot railroad museum. Currently there are two levels of membership – regular and life. The price is \$20.00 for regular membership and \$200.00 (ten times regular membership) for life membership. We have approximately 591 regular members and 411 life members. It has been over nine years since dues were raised from \$10.00. In that time the track length has grown from 735 feet to over 1.6 miles. Building additions have included the freight house, section house, heated shop, and Alna Center Station. Soon we will have a water tower. Our land holdings have increased as well. Rolling stock additions have included #52, restoration of boxcar 309, lease of coach #3, construction of caboose #320, acquisition of locomotive #10, lease of excursion car #103, and upcoming addition of an additional coach and flat car.

The following is a review of other similar museums' membership and fee structures

	Junior	Individual	Family	Senior/Student	Life
Sandy River	10	20	50	N/A	200 (15 yr)
Maine NG	N/A	35	65	25	5,000
Colorado RR	N/A	30	50	N/A	500
Hawaiian RY	10	25	40	N/A	500
Nevada Northern	N/A	30	50	N/A	1,000
Maine Maritime	N/A	30	60	N/A	N/A

As can be seen, all of the museums offer family memberships in a similar price range. Frequently, people buying tickets ask whether family memberships are available. If a family membership were to be offered, it would include only one newsletter and one vote. It would also offer a family discount on rides. The family membership should be priced at 2.5 times the regular rate. Family memberships at 2.5 times the price of

individual memberships will increase revenue slightly, enough to far more than cover the discounted ticket revenue and administrative costs.

Also, due to our increased costs in running the Museum, an increase in the annual membership should be strongly considered. The regular or single membership should be increased to at least \$25 and possibly \$30.

## 2. Ticket Prices

Ticket revenue has increased substantially in recent years due to the advent of more steam and higher ticket prices. At the present time, the committee feels that the price structure is adequate. However, as mileage increases, the fare structure will need to be modified to take into account a possible “short” ride to Alna Center and a “long” ride going beyond Alna Center to end of track.

## 3. Membership and Ridership Growth

While it is not known what the limits of our growth will be, it can be assumed that other aspects of this Plan (restrooms, parking, etc.) will result in growth above and beyond what our normal growth would otherwise be. Other factors, such as the scheduled national airing of *Restoration Stories* on PBS sometime after May 1, 2005, could result in a dramatic increase in not only riders but in converting those riders/visitors to members. Also, it can be anticipated that the Museum will undergo membership and ridership growth as a result of the physical growth such as track length and non-railroad growth (saw mill, agricultural activities, and special events). Our goal should be to focus on those items that will enhance this growth and provide a comfortable and enriching experience for both our members and our rider/visitors.

The following tables provide the details of our membership and ridership growth to date.

Year	Charter/Life	Annual	Lost Members	Total
1989	17	5		22
1990	34	46		102
1991	4	18	-1	123
1992	6	25	-14	140
1993	34	95	-16	253
1994	36	104	-26	367
1995	44	93	-74	430
1996	16	60	-41	465
1997	25	74	-59	505
1998	18	76	-34	565
1999	22	59	-36	610
2000	27	80	-50	667
2001	33	91	-52	739
2002	36	110	-44	841
2003	40	86	-66	901
2004	38	113	-36	1016

Note: Dues were increased from \$10 to \$20 effective 1 May 1995.

Ridership, or more precisely ticket sales, for the past three years have been as follows:

Year	# of Tickets
2002	2249
2003	2271
2004	2734

Weather, the economy, publicity, and the use of steam-powered trains all influence the ridership numbers. It is anticipated that the use of steam is probably a major factor in the 2004 increase.

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## **Section 8    Local Relations**

### ***Executive Summary***

As the Museum grows, local relations will become more important for the Museum to ensure smooth alliances with the towns where we operate or have land holdings and with property owners in the area. In order to achieve these ends, we propose that a committee of two or three members be appointed to manage this function.

### ***Detailed Discussion***

#### **1. New Committee**

A Local Relations Committee should be appointed by the Board. Two, or maybe three, people should be sufficient. The committee members should be people who are knowledgeable of the area and comfortable dealing with municipal officers and boards. They should feel at ease working with abutters and so be able to serve as liaison between them and the Museum. Past relations with abutters, with one notable exception, have been relatively smooth. The new committee will work to continue this pleasant situation.

#### **2. Actions**

Communications with the towns along the line, probably all the way from Wiscasset to Albion and Winslow, ought to be increased. At a minimum, each board of selectmen should be on the mailing list for the newsletter, but no other routine mailings. The president's report at each annual meeting should likewise be sent to each board of selectmen.

We have had some unofficial discussions with the town of Wiscasset over the past few years about the WW&F returning to Wiscasset. Those discussions have been positively received. Dialogue should be continued, as extending the WW&F back to its 1895 point of origination would be mutually beneficial to both Wiscasset and the Museum. Since Lincoln County government is heavily involved in economic development in the county, the county commissioners also should be kept abreast of the work of the Museum

Likewise, all residents with homes on property that abuts the operating right-of-way or land being cleared should get the above communications and one or two family all day tickets each spring. In cases where private roads cross the right of way, the Museum should be proactive in working with the owners of the roads in the matter of grade crossing maintenance, signage, etc.

Each year most towns make donations to charitable organizations, historical societies, and museums in the area. The committee should pursue getting a petition for a warrant article at annual town meeting in towns where it might be appropriate.

#### **3. Resources required**

Some time will be required of the committee members. They might want to actually visit an occasional selectmen's meeting. If a donation is requested, being at the appropriate town meeting is necessary. Sensitivity to concerns of neighbors will likely not be a major time demand. The mailings described above will be a minimum cost.

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## Peripheral Operations

### Section 9

#### ***Executive Summary***

“Peripheral Operations” are those events, establishments, and items that are not part of the railroad operation of the Museum, but would serve to enhance the operations of the railroad by being dependent upon the railroad, by being a destination on the railroad, and by being representative of businesses and operations that the railroad served historically.

#### ***Detailed Discussion***

The Museum should establish and develop, or promote the establishment and development of, certain historical activities not directly related to the operation of a railroad. The existence of these activities would serve as a historical preservation in their own right, and in conjunction with the operation of our railroad, would serve as a greater overall draw to visitors and membership than either could alone.

These operations would be set up to be generally dependent on the railroad for transportation of the items used in their operation and of people to visit the operation. Thus would such an operation provide a framework for railroad freight operations and showcase how local businesses were dependent upon the railroad.

Examples of such activities include:

- A working steam-powered saw mill, perhaps followed over time with a shingle mill and a clapboard mill.
- Farming operations, such as growing and harvesting hay.

The activities could, with development, be made to be self-sufficient and the products made therein be sold commercially on a small scale.

It is of utmost importance that the development of these peripheral operations have little or no impact on the work and progress on the railroad itself – that is, at no time should the Museum make any of these activities such a priority that they require manpower and money that substantially reduces efforts on other fronts. To ensure this detail, some effort will have to be made to attract volunteers specifically interested in these ideas, so that manpower is not withdrawn from railroad efforts. Further, it may be prudent for some of these activities and operations to be established as a separate but affiliated non-profit organization (for accounting, insurance, and fund-raising purposes), provided there are enough separate leadership-level people involved to maintain a separate organization.

Initial efforts should focus on a saw-mill, for which a substantial amount of infrastructure has been obtained already, including a steam engine and a saw mill. All that is needed is a site, an open-sided building, replacement of some wooden parts in the mill, and a boiler. This can serve as an easy test for the concept of peripheral operations.

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## Section 10 Preservation of Other Railroad Aspects

### ***Executive Summary***

The Preservation section of this Plan is divided into three subsections.:

1. **Unused Right-Of-Way:** Recent research into the ownership of all former railroad right-of-way should continue, and every effort should be made to maintain the railroad corridor and resist encroachments upon it. This may involve agreements with snowmobile clubs and conservation associations.
2. **Albion Station:** We should continue our efforts to assist in the restoration of this historic station building, and to be aware that our role may increase in the future if local volunteers require greater assistance.
3. **Other Former Railroad Buildings:** These buildings should be identified, and examined to determine the feasibility of saving what can be saved, and recording for the future what can be recorded.
4. **Wiscasset:** While there is no plan to lay track toward Wiscasset during the next ten years, the Museum should establish relations with town and county officials there as soon as possible.

### ***Detailed Discussion***

#### **1. Unused Right-Of-Way**

Of the 43 miles of railroad main-line and the 13 miles of the Winslow branch, only the ownership status of the approximately 6 miles of right-of-way in Alna has historically been known with any great certainty. The ownership of the Alna land is known from tax maps that still show the strip of land that belonged to the Wiscasset Development Company (WIDCO) and later to Harry Percival. It is only within the last couple of years that research into the deeds and ownership situation of line in Alna and Wiscasset was undertaken by one of our volunteers. This research is still ongoing.

The committee recommends that this research be continued for every town through which the railroad ran, on both the Albion and Winslow branches, to ascertain what land the W&Q owns. It is also the consensus of the committee that every effort should be made to maintain the railroad corridor and resist encroachments upon it.

Realistically, it would take decades for the entire railroad between Wiscasset and Albion to be rebuilt, if it ever is. To that end, no decision should be made that would preclude this event from happening. Decisions should be made about what to do with the remaining right-of-way under Museum (or W&Q) control. For example, in the town of China the right-of-way is a snowmobile trail, actively maintained by a local club, and this is perhaps a model for future right-of-way conservation. If the Museum organization decides not to create or maintain a trail, perhaps a partnership with an organization such as the Sheepscot Valley Conservation Association (SVCA), whose goals of riverbank conservation somewhat match our goals, can be crafted.

Right-of-way that is on private property should be noted and monitored for possible sales. Any land on or near right-of-way that is for sale should be communicated to the membership.

We anticipate that this process will take many years and will never actually be complete, but it is important to pursue to avoid any more loss of the right-of-way.

## **Albion Station**

2.

The Albion Station is a story of a building brought back from the brink of ruin. It was rescued in the nick of time by several local residents, who have since become involved in restoring the station under the oversight of the Albion Historical Society (AHS).

Since the late 1990s, volunteers from the Museum have spent one Saturday a year at Albion Station assisting with the restoration, either by building track or working on the station building. This cooperative effort is very important, and it is our recommendation that it continue. The time will come, however, when more may need to happen. The principals in the station restoration effort are well past retirement age, and there seem to be no younger volunteers coming forward on a regular basis. The Museum should be prepared, at some point in the future, to make an agreement with the AHS concerning the future of the station. Whether outright purchase or a management agreement is unknown, but all avenues are worth pursuing.

## **Former Railroad Buildings**

3.

Along the railroad corridor there are still buildings other than Albion Station that belonged to the railroad or railroad-related industries and are still standing, albeit under private ownership: the North Vassalboro and Palermo stations come to mind. These buildings should be identified, and examined to determine the feasibility of saving what can be saved, and recording for the future what can be recorded. Probably most, if not all, of the former railroad buildings are known to many authors, and they should definitely be consulted. Recording for preservation has been very recently done by the Friends of the East Broad Top Railroad on the EBT's Saltillo Station, and they can be consulted along with other groups for methods of pursuing this. It is expected that this task will also take several years. The process should begin immediately.

## **Wiscasset**

4.

Wiscasset, the one-time southern terminus of the railroad, merits special attention. While there is no plan to lay track toward Wiscasset during the next ten years, in about 2010 the Museum will have to decide which direction it should take once the north end of track reaches Route 218 in 2013. More than with any other town, relationships should be established with town and county officials in Wiscasset during the next five years (2005-2010). Crossing 218 towards Head Tide or crossing Cross Road toward Wiscasset would take us under FRA jurisdiction (and all that entails), as these are public roads.

If a Route 1 bypass is built to the north of Wiscasset that does not take our needs into consideration, our ability to reach Wiscasset may be taken from us. Other activities, such as shoreline development, may also make it more difficult. Wiscasset could be a very important destination for us, with the historic attraction of the town and the traffic that passes through it. Like we do with other right-of-way, we should make every attempt to keep the line available to us, even if we never use it.

## Section 11 Archives

### ***Executive Summary***

The Archives are an often overlooked aspect of the Museum. The current and future status of the archives is addressed in the following three areas:

1. **Current Status:** The current status of the archives is not ideal, but progress is being made.
2. **Archival Center:** In the proposed Visitor Center, a secure and climate-controlled Archival Center should be built.
3. **Interim Solution:** In the interim, the Museum should be prepared to support the Archival Committee's actions.

### ***Detailed Discussion***

#### **1. Current Status**

The archives are currently in a less than ideal situation, but in a better situation than they were a few years ago. The approximately 1000-piece collection consists mainly of paper (timetables, tickets, correspondence, photos, and other miscellaneous paper), with a small number of hardware items (locks and lanterns, for example). The paper items are stored at a volunteer's house, individually in archival plastic sleeves and cases. The hardware items are stored semi-securely at the Museum. This makes research by any party, either within or outside of the Museum, difficult.

An Archival Committee was formed several years ago to oversee the archives and establish policies and procedures for administering the archives. The committee chair is currently creating of a master list of pieces, as well as working with the committee and other volunteers outside of the committee to create policies and procedures.

The Archival Committee has a limited budget, generated by sales of pieces in the large Gunnison Collection, donated several years ago, and other non-narrow gauge and non-New England materials that come into Museum hands. This budget goes largely toward the purchase of WW&F historical material (at live auctions or on eBay) and toward supplies.

Displays of some of the archive materials are in the freight shed, and the displays have not changed much in the last several years. Interpretive labeling is nearly non-existent. The displays, while copies of the originals, are not secured and could be stolen.

#### **Archival Center**

#### **2.**

When a permanent Visitor Center is built, this committee recommends that the Museum set aside an area within the center as an Archival Center. This center would be climate-controlled, fire-proof, and have limited and controlled access. This Archival Center would allow members and friends access for research. Additionally, the Visitor Center should contain space for archive display. These displays should be secured behind glass, and should be rotated at least once per year.

### **Interim Solution**

**3.**

In the interim between now and the Archival Center, clearly some measures need to be taken to ensure the Archives are in a safe and secure place. This committee recommends that a location for the paper material be found that is fire-proof and climate-controlled. Some ideas for this may be to find a local organization with such storage, such as the Nobleboro Historical Center; or to put everything into bank vaults. While access will be even more limited than it is now, the Archives will be in a safe location.

It is the understanding of this committee that the Archives Committee is currently working on policies on preservation, acquisition, de-accession, and display. The Museum should be prepared to begin providing an actual budget to support these activities, and work to increase the budget every year as a relative percentage of the overall budget. This should ensure that the Archives are cared for to the best of our current ability.

## Section 12 Project Priorities

### **General Discussion**

The surveys and letters we received contained frequent praise for the progress and success of Museum projects, and the Museum’s ability to accomplish projects with an economy of dollars and manpower. Thus, proper planning and prioritizing have been essential to the efficient use of resources and focusing resources on major needs in lieu of meeting minor needs. While successful completion of projects in a timely manner has been noteworthy, the exact timing of projects has not been as important as the relative placement of projects and the execution of projects when resources allow.

### **Lists of Priorities**

This section presents four lists: Continuing Projects, Current Obligations, Major Projects, and Minor Projects. Continuing projects are, as the name implies, tasks that will be with us every year during the planning period. Current obligations are projects where we have a contractual obligation or for which we have received designated funds. Major projects are those that require a substantial investment of funding and labor. Minor projects are all remaining projects not considered major ones (but are nevertheless important).

The presentation of these four lists in that order does not imply that all continuing projects must be completed first, that current obligations must supercede other projects, or that major projects must be completed before minor projects. While work on major projects should not block work on minor projects, neither should the Museum “pick the low-hanging fruit,” i.e. devote its full attention to the minor projects because they are easy or otherwise appealing, to the detriment of setting aside money and manpower to the major projects. Rather, the Museum should consider all of these lists when selecting what projects to do next, and should attempt to overlap projects where possible, giving more or less equal priority to projects in all four lists.

To assist in this project selection process, the first column in each table lists any projects that must be completed before the listed project can begin. The second column briefly describes the project, and the third column assigns a relative cost in both dollars (\$) and volunteer hours (v). The last column is a very brief summary of the need for the project. With these parameters in mind, the order of the projects *within each list* implies a possible priority.

### **Continuing Projects**

Prerequisite	Project	Cost	Needed for
Land leases and clearing, improved track material delivery (see below)	<b>Mainline extension</b> – this project involves the construction of track at a rate of about 0.2 miles per year, reaching Route 218 in about ten years.	\$\$/yr vv/yr	Restoration of the railway, continued volunteer, visitor, and donor interest.
	<b>Maintenance work on locomotives, cars, and track</b> – this project involves routine inspection and lubrication, replacing worn or broken parts, etc.	\$/yr vv/yr	Routine maintenance of the Museum’s work-horse engines and equipment

### Current Obligations

Prerequisite	Project	Cost	Needed for
	<b>Restore excursion car #103</b> – this project involves replacement of rotten wood, installation of brakes, and other work to make the car serviceable.	\$ vv	Growth of visitor count, with increase in ticket and store revenue. We have a lease agreement for this.
	<b>Restore locomotive #9</b> – this project involves about a year of work at Boothbay building a new boiler followed by another year or so at the WW&F shop installing the new boiler and associated appliances, plus other restoration work.	\$\$\$ vvv	Restoration of the railway, continued volunteer, visitor, and donor interest. This project is at least 50% funded.
	<b>Build a water tank</b> – this would be a reproduction of the Head Tide water tank and would be located across from the section house.	\$\$ vv	Authenticity. Also reduces dependence on Percival well. This has been funded by a grant.
	<b>Build a flatcar</b> - this project involves the construction of a new flatcar or conversion of some other car into a flat car.	\$\$ vv	Improve the efficiency of track-laying. We have received funds for this.

### Major Projects

Prerequisite	Project	Cost	Needed for
Clearing needed land	<b>Restrooms</b> – this project involves determination of code requirements, location selection, building design, construction of disposal field, and construction of a building. It is estimated to take two years.	\$\$\$\$ vvvv	Growth of visitor count, especially families and tours, with associated increase in ticket and store revenue.
Clearing needed land	<b>Parking</b> – this project involves clearing, stumping, and surface preparation on the recently-purchased Boudin property.	\$\$ vv	Growth of visitor count, with increase in ticket and store revenue.
Use of this facility for car storage requires that access track be built.	<b>Build a car storage facility</b> – this project involves the construction of a large building on the Boudin/Percival properties and the track access to it.	\$\$\$\$ vvvv	Storage of a new coach and any other rolling stock needing protection from weather or vandals
	<b>Build or buy a new coach or combine</b> – this project involves the acquisition or in-house construction of a new coach or combine from the ground up. A coach would provide more seating, but a combine would provide convenient handicap access.	\$\$\$ vvv	To protect against future transfer of coach #3 back to MNG and/or to provide additional all-weather passenger-car-carrying capability.

### Minor Projects

Prerequisite	Project	Cost	Needed for
Restoration of Averill Road and clearing of land	<b>Improve track material delivery</b> – this project involves storing stone at Alna Center. It is estimated for completion by mid-summer of next year.	\$ v	Mainline extension (see above)
	<b>Improve volunteer experience</b> – appoint a Volunteer Coordinator who maintains a daily list of projects and encourages newly-arrived volunteers to join in. He would be supported by a committee that establishes a volunteer recognition program and coordinates outreach to scouting and similar groups.	vv	Growth of volunteer workforce.
	<b>Improve accounting</b> – this project involves the purchase and operation of an accounting program to provide clear and accurate management of Museum funds.	\$ vv	Improvements in our decision-making process and compliance with grant requirements.
	<b>Create Financial Development Committee</b> – this committee would examine life income annuities, annual giving, estate planning, grants, and growing the endowment.	\$ vv	The Museum’s financial future
Restoration of #9	<b>Do more targeted marketing</b> – this project involves shifting our advertising from county media to larger-distribution media such as Portland and Bangor papers. TV outlets and magazines should also be approached when #9 is running.	\$ vv	Growth of visitor count, with increase in ticket and store revenue.
	<b>Revise Membership Fees</b> – consider the possibility of increasing membership dues and adding a family membership class.	v	Increased dues revenue
	<b>Improve on-premise presentation</b> – clean up the junk, provide graded walking paths, install interpretive signage, prepare a hand-out explaining what the visitor is seeing.	\$ vv	To fulfill survey request and to attract repeat visitors.
	<b>Improve off-premise presentation</b> – re-vamp the train show booth, put books and video in local libraries, create a scripted PowerPoint/slide show for local fraternal groups and schools.	\$ vv	To increase awareness and interest in the Museum.
	<b>Create line-side industries</b> – these would be industries similar to those that once existed along the railway, such as a sawmill and possible farming.	\$ vv	Continued volunteer, visitor, and donor interest.

	<b>Build a Model T</b> – Leon Weeks is building the body and power train. WW&F will supply running gear.	\$ v	For use in low traffic periods; possible Alna Center to end-of-track service; replica of similar WW&F car.
	<b>Build a 2-man velocipede</b> – Ben (a friend of Eric Larsen) has built this. It needs 2 of 3 wheels.	\$ v	Transport of materials and 2-man crew. Can be lifted clear of train traffic. Historical interest.
	<b>Alna Center station finish work</b> – add insulation and interior paneling	\$ v	Completion of this important replica building.
	<b>Wood shed, blacksmith shed, coal storage</b> – the wood shed and blacksmith shed would be similar to the present flammable materials shed. Design of the coal storage facility is undecided at this time, but must be accessible by tractor trailer.	\$ vv	Improve appearance of the Sheepsfoot yard as requested in survey.
	<b>Research ROW ownership and former RR buildings</b>	v	Historical interest and protection of ROW from future encroachment if possible.