

Long Term Sustainability - Keeping our Railway Museums Around for Future Generations

By Don Evans, West Coast Railway Association

I admit it - I am a fan of long term planning (or strategic planning) for any major endeavour in one's life, business - or railway museum. In fact, given the magnitude of the kinds of projects we get into and the infrastructure costs we incur, I suggest it is a critical element for success. We cannot easily uproot our museums and go elsewhere - at least not without much effort and funds - so planning for the future directly impacts our ability to succeed. The strategic plan lays out the most important objectives and strategies for the future of the whole organization.

Along with this planning approach goes a need for strong and consistent leadership. A strong leader helps keep the master vision (or the big picture) in focus and sees to it that the projects and activities undertaken help the museum move towards its vision. When a museum seeks its key position, be it a volunteer or paid role, Executive Director or President, that ultimate leadership role is critical to the forward movement of the enterprise and should be selected with the ultimate of care.

Fortunately - there are several things we can do in conjunction with leadership and effective planning to develop our long term approach to success.

Sustainable facilities and operations - how we care for and preserve our artifacts and collections

If there is one thing we know at our museum, it is that collection planning is essential. Each artifact costs money just to have it around, and even more money to maintain it. The more we restore it the more we need to budget to maintain it. To put this further in context, we need to have both a museum facility and a financial plan that will sustain our collections.

In my own museum's situation, we have a collection far larger than what we are able to properly care for today. This is because we spent many years collecting before we started to create the proper home for we had collected. When we got around to developing our museum master plan and our first strategic plan (back almost 20 years ago now), we discovered that just to sustain our collection of 90 pieces of rolling stock would take a museum that attracted over 80,000 visitors annually with an average drop of \$15 per person. And that will only increase over time!

Our Collection Plan became key, laying out plans for each piece we had (including de-accessioning a few pieces that didn't fit our interpretive focus). Each now has a long term defined interpretive or operational role (we have both an exhibit and an operating collection) in which we outline details and ideal timing for work - both restoration and maintenance. There is a need to be realistic about what we can handle, care for properly, and present to our guests. Even with this work, our plan for moving from the junk lines to the full interpretive presentation focused around five key train sets is a massive task and far from complete as yet.

Our Marketing Plan is equally important, as it is the part that sets out the marketing strategies that will attract the guest numbers we need to drive the funds that will make the operation sustainable from operations. This links to the master development plan which we are working with today. By 2010, we will be getting close as projected attendance with our new conference centre will grow towards 75,000 annually and the spending per visitor should exceed \$15 comfortably allowing more collection work to proceed.

One of our constant struggles is the fine line between the needed site development and the needs of the collection for preservation. Which comes first is a matter of continuing debate; I submit that there is a need for both with a careful balance that will make for the best long term solution.

Funding and long term financing

We cannot do all of this by ourselves. Museums that set themselves into the narrow field of self interest, without careful evaluation of their narrow market, are at risk. They will not attract the resources they need for the future nor will they have the financial strength to survive. There is a need to build for others (as we described earlier in our article on Museum Markets) and there is a need to broaden our support base as well. In fact, these two approaches go together somewhat, as the broader the interest we generate then the broader the field of skills for us to leverage and select from. Many of us have already discovered this when we connected heritage preservation and education together, an approach that opened new grants and resources to us.

The key to long term financing has two components to this writer - who we have aboard to help us access funds, and the financial structures and techniques we put in place to ensure our futures. I will address two of these here.

Board Structure and Resources - a key opportunity for all of us is getting more senior people involved in our governance and planning activities, and this is a major key to our credibility and successful fundraising as well. No longer are most of our Boards, made up of those of us we are most comfortable with and who want to debate the colour we paint the next artifact, able to do the things needed to take our Museums beyond their current status. We need new resources to help us leap forward and ensure our futures.

Our museum has discovered the power of this approach, as we have created our new governance board comprised of community leaders from many different walks of life. The diversity of this board and the skills they have brought provide guidance of a sort we could never have envisioned as the rail fans we were. They are also able to see things needed for the future that our closeness to our Museum might have blocked out, and when we do our major fundraising drives they open doors and lend incredible credibility to our cause and efforts.

It is not an easy sell to our long term memberships - I well recall the debate over who has control of our assets, and over whether these “outsiders” will work for us or cause us to go in some other direction. Our experience has been that the new resources on our board have quickly become valuable contributors, advocates and supporters, gaining us access to new constituencies. They have actively started to work for us and become a new level of valuable “insiders” to our museum. But many of us long timers found we had to do some “letting go” in order for the museum to move ahead.

This is the era that most of our community leaders still have their own memories of their experiences with railways from their own pasts, but this is on the decline as they age and retire. We must capture these people now while we can and put it to work for us.

Long Term Funding - there are two essential approaches here, and they often go hand in hand.

Planned Giving is critical to our financial success at this time, and now is the time to do it. Look at the average age of our memberships, and you will likely see that we have many senior members. Has your museum put together a Planned Giving package which you can use to help them with their estate planning, and thus lend a long term hand to the success of the museum of which they have

been a valuable part? Unfortunately, many of us neglect the importance of having our own wills and estate plans, perhaps the Museum can stimulate this approach - which aids everyone involved.

The sad part is that in the absence of estate plans, governments get far too much and those we wish to have our money go to lose out. It is up to each of us to specify where we want to leave our legacy. Many of us don't think we have much of an estate, but just owning a home these days creates a considerable financial legacy. Planned Giving is about our having a say in where our legacy goes - if we don't, then someone else decides that for us.

Endowment Funds are another vehicle we should all consider. These are funds where the money donated to the fund is held in perpetuity, growing the capital, while the interest comes to the Museum on a regular basis. It is sometimes a challenge to see that this approach is valuable, as we struggle to raise funds to carry out our construction and restoration activities. But, the Endowment Fund pays off for the future longevity of the museum. Many of our donors, particularly through their estate plans, wish their donations to go on and on. The Endowment Fund is the answer to this. Our West Coast Railway Endowment Fund will reach \$1.6 million by the end of this year, and generate us over \$70,000 annually in interest. This is truly funding for long term sustainability.

Rural to Urban - Where we are located is changing.

I have visited many railway museums that were originally located in rural or suburban locations, only to find themselves now being built around in an urban way 30 years later. Illinois Railway Museum comes to mind, along with many others including my own.

Important here, if we can, is to plan for this and take action to protect our investment and operations. Illinois has taken this approach actively, as they have added land around their facility while it is affordable in order to have a buffer zone and retain their separation from neighbours at a reasonable space. The design of our own museum considered site parameters in choosing our core land; we are bounded by a river dyke on our west side, the railway main line on the east side and the main road on the south (a triangular property) so no incursion of residential is possible. Cityscapes are expanding rapidly and how you set up to ensure your future positioning is important. Look ahead and imagine where impacts could be and make plans to be ahead of the occurrence.

Work to become good neighbours where we suddenly find ourselves thrust into a new neighbour environment. Invite them into your museums and encourage them to become part of the operation (and maybe participants and volunteers). Turn the museum into a neighbourhood asset; work with them to avoid issues such as parking and noise, hold annual neighbourhood parties for example. The best approach is one that involves them in a welcoming way.

Environmental Stewardship

Today's emerging hot button is something we need to be thinking about as it becomes more and more important. And, as our markets shift to those who have not had the past railway experiences, the past things we accept (Smoky diesels, oil leaks, smoke from steam, the condition of our shops etc.) will not be acceptable in the future.

Again, planning is important as well as basic actions you take at your museums. Some things are easy - implementing a recycling program for your trash and your food services is visible and contemporary. Put track pans by the shop where you park your locomotives. Pay attention to leaks and spills; clean them up quickly and thoroughly and repair the sources. Be sensitive in operations;

don't deliberately make smoke that can be avoided. Of course, not everything can be perfect this way, but just thinking about this will go a long way and help avoid unnecessary issues.

On our recent first mainline trip with Royal Hudson #2860, the crew instruction was for crisp white steam, no sanding of the flues unless there was a crisis to be dealt with. The results were spectacular as the engine paraded in front of more than 15,000 people and several TV cameras. A full DVD capture shows a beautiful clean burning steam locomotive as it cruised the mainline with happy passengers and excited on-lookers.

Summary

Long term sustainability is all about being prepared for the future. It is a critical concern for all of us in the museum field, and some of the things we should be actively working on every day right now in our strategic and long range planning, as well as our everyday actions and museum activities. We must be prepared and willing to constantly change, to adapt and position as new trends emerge, and to put them to action to show that we are here for the long term. With continuing work, we can and will be around for future generations.