

Shelburne Falls Trolley Museum, Inc.

**Final Report of the
Five Year Plan 2022**

(Approved 4/12/2022)

“Plans are nothing; planning is everything.”

— Dwight D. Eisenhower, 34th U.S. President

This Final Report is presented by Sam Bartlett, President, on the progress or lack thereof, on the 2022 Five Year Plan. We decided to revise the Five Year Plan early due to substantial changes in several projects.

Final Report comments are in italics below each section.

Mission Statement

(Approved 5/27/2001)

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

This mission is carried out by:

- 1) Preserving railroad and trolley history and artifacts by collecting, restoring and displaying trolley cars, locomotives, rolling stock, tools, equipment, photographs, ephemera and other items associated with the purpose, use, operation, function, study and enjoyment of railroads and trolleys.
- 2) Recreating the experience of an early-1900's rural street railway by giving rides on our demonstration railway on restored trolley and railroad equipment. The rides include interpretive talks on the history and uses of the equipment, the importance to the community of the services the railroad and trolleys provided and their role in the development of the community.
- 3) Offering educational programs to area schools and organizations about the history of the local trolley and railroad operations.
- 4) Restoring and maintaining the historic freight house and yard to demonstrate their significance to the community.

Five Year Plan 2022

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

limit us, in choosing new Programs and Projects.

This Five Year Plan is for guidance purposes and does not lock the Museum into any particular path. If unanticipated events dictate a change in direction on any particular program, the Board of Directors can make those changes as it chooses, consistent with the Mission Statement. If a change is indicated in a Project, the Board of Directors or its agents can make those changes as it chooses, as long as it still supports one or more Programs.

See the 2017 Five Year Plan Final Report for past progress.

GENERAL

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

I do not foresee any changes to the above direction.

PROGRAMS

Interpretive Rides

We will continue to offer Trolley and Hand Car rides that are interpretive, historic and safe. We plan to be open to the public, with rides available when we are open, on weekends and holidays from Memorial Day weekend to the end of October, and Mondays in July and August. We may also provide Speeder and other rides if equipment is available. This Program is supported by the following other Programs:

- **Visitor Experience,**
- **Safety and Training,**
- **Volunteer Retention and Recruitment,**
- **Preventative Maintenance,**
- **Track Inspection,**

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

Ridership was down 20% in 2024, most likely due to the Bridge of Flowers closure and downtown street repair projects. We discontinued Monday operations in 2023 due to limited volunteer availability. We did run monthly Speeder Saturdays which were well received by our visitors. I think we should continue the Speeder rides and add Caboose rides, probably once a month as well, once the Trackmobile is fully ready for such service. I do not anticipate any other major changes to this Program in the next Five Year Plan, although a increase in ridership, without increasing our operating hours, would be welcome.

Visitors Center

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

The **Building Improvement Project** supports this Program by upgrading the broadband service.

We were successful in implementing this Program. The broadband service has been upgraded. The update of educational displays has been discussed but little progress was made on this front.

Freight Yard

The historic Buckland Freight Yard is our home. As such, it is a vital part of our visitor experience as well as an important part of our Mission. We own the yard outright. The yard and buildings are also an important source of revenue from rental of surplus space. We will continue keeping the yard attractive, and will work to find less visible locations for the unsightly equipment that is awaiting restoration, and to remove materials that are not needed for our Programs and Projects. We need to update the interpretive signage in the yard. Our rental space is fully occupied and we will work with our tenants to keep them satisfied.

Projects related to this Program are **Track Rehabilitation, Building Improvements and Track Extension**.

Our volunteers continue to keep the yard mowed and trimmed and looking attractive. We installed more interpretive signage for the rolling stock. See the related Projects for more progress.

Member Outreach

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

Membership has remained steady, with some folks leaving and new members joining. Growth has been elusive. See the discussion below on the Membership Growth Project. We have put out three Transfers each year.

Public Outreach

We will continue this program through the efforts of our Public Relations and Marketing Coordinator. We will continue to fine-tune our rack card distribution and our media exposure. We will continue our website and social media efforts. We will continue with our Trolleyfest event.

All of these Public Outreach efforts have been on-going. Web and social media efforts continue, although we are perhaps lacking in cutting edge social media like Instagram or Twitter. We have not run a TV ad campaign since the pandemic.

Educational Outreach

Through the efforts of our Public Education Coordinator we will continue to host school and youth group field trips, and make sure that local schools know about our field trip program.

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

Volunteer Retention and Recruitment

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

At present our volunteer participation for operating crew is barely adequate. The addition of new shop projects has brought in several Projects volunteers who work a day or two a week on Projects. Our new Volunteer Appreciation Program has two aspects: 1) gift cards to local businesses paid for by grants from local banks, and 2) a subsidy for SFTM-branded apparel for the crew to wear when volunteering. Outreach to visitors and in the spring in newspapers seems to be our most successful efforts at gaining volunteers.

Visitor Experience

Our visitors are crucial to our Mission. The above Programs all support the Visitor Experience. In addition, we will produce a walking tour and safety handout pamphlet for our visitors.

*We did not start on the walking tour and safety handout pamphlet. We should also install interpretive signs for our buildings, No. 10, the pump car and other rolling stock not yet signed. The **Visitation Survey Project** should be added as a related Project.*

Preventative Maintenance

Through the efforts of our Rolling Stock Supervisor we will continue to perform Preventative Maintenance on No. 10, the Hand Car and the Speeder and any other equipment used for **Interpretive Rides**. This work is essential to keeping our equipment in a reliable and safe working condition.

This program is ongoing, our equipment has been safe and reliable.

Safety and Training

Through the efforts of our Safety and Instruction Supervisor, this program supports the **Interpretive Rides** Program by making sure our operating crew are well-versed in how to operate the equipment safely and informatively. We will update our Rulebook and Training Procedures in 2022, and continue to improve these when weaknesses are identified.

This program is ongoing. Our updated Rulebook and Training were well received by the crew. We will need to add a section on Trackmobile-powered Caboose rides if we offer them.

Track Inspection

Through the efforts of our Track Inspector we will continue to perform Track Inspections to keep our **Interpretive Rides** safe and reliable. This will encompass both daily track inspections and occasional more comprehensive track inspections. This Program is supported by the **Track Rehabilitation** Project. Overhead Wire inspections, including poles and bracket arms, are part of the Program as well.

*This program is ongoing, see **Track Rehabilitation** for progress on that Project. We started a comprehensive Overhead Inspection, which needs to be completed and any recommendations implemented. The rehabilitated track near TOs 1,2 and 3 make Track Inspection easier.*

Library and Archive

Through the efforts of our Ephemera Curator we will continue to catalog and preserve and organize our collection of videos and books and ephemera. Preserving the history and artifacts of the Shelburne Falls and Colrain Street Railway, local railroad history and the museum's history is a major part of our Mission Statement.

This program is ongoing. Organizing the collection is mostly complete. Cataloging software is being researched.

Restoration

Through the efforts of our Restoration Coordinator we will continue to restore our collection of historical rolling stock. This Program is supported by the **Caboose CV4015, Spare Trolley Trucks, MBTA PCC Trolleys, BAR coach 230, B&M Box Car and HT&W Flat Car Projects**.

This program is ongoing. We have extended the Car Barn to allow for more

restoration and shop space, and added to our shop tools. We have added the “Berkshire Hills” and the Line Car 3283 to this Program. See the separate Projects below for specific updates.

PROJECTS

SF&C St Ry No. 10

We will continue to maintain the exterior and interior of this trolley car, and to keep it in safe operating condition. Sufficient Funds have been allocated. We will add the plow boards to the trucks. We will add the lightning arrester circuit.

We added the plow board, we have not added the lightning arrester yet.

Caboose CV4015

We will continue to maintain the exterior and interior of this caboose. Sufficient Funds have been allocated. The caboose will be displayed outdoors during the operating season. Winter storage location will depend on other Projects' needs. Interior access will be available to the public during operating hours unless restoration activities dictate otherwise. We want to install a metal shield for the stove and install the proper caboose stove, replacing the B&M station stove currently installed. Project Coordinator is Sam Bartlett. Funding is already allocated for this Project.

We added the metal shield and caboose stove. We still need to install the hot water tank. Some exterior repair of roof walks and cupola trim is needed.

Spare Trolley Trucks

We want to have spare trucks (wheel sets and frames) available in case of malfunction with one of No. 10's trucks. We have purchased two trucks that can be used as non-motorized trucks. One of these trucks is being rehabilitated as needed. Our end goal is to have one unpowered truck under No. 10 and to put the two already-overhauled motors into the truck that is currently under No. 10 that was more completely overhauled during the initial restoration. This will change No. 10's configuration from two single motor trucks to one unpowered and one dual motor truck. The truck that was removed from No. 10 can then be overhauled if needed and have the two motors that have been under No. 10 since initial restoration installed in it, after overhaul of the motors if needed. This will give us one spare dual-motor truck and one spare unpowered truck. Once motors are installed, the powered truck will be stored primarily indoors. One or both spare trucks may be used as 'shop trucks' for another project, and are available to be incorporated into an operating second trolley car if one becomes available (see **Second Trolley Car Project**). Some additional funding may be required for rehabilitating the trucks and installing the motors. Project Coordinator is Josh Redenz.

We have completed the restoration of one truck except for some brake components.

MBTA PCC Trolleys

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

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

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

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

PCC 3299 may be used as a parts car if we determine that operational restoration of 3321 is a worthwhile endeavor. In the meantime, it will be painted in the MBTA Green Line scheme by volunteers or contractors. The scraping and painting should be a priority to improve the appearance of the yard. The windows removed from 3321 will be used to replace the missing 3299 windows and additional windows will be bought if needed. Doors will be rebuilt or replaced with non-operational inserts. 3299 may have its trucks, electrical and mechanical equipment removed for inspection and/or rehabilitation for 3321's restoration. At this point neither car can be moved on its trucks due, presumably, to frozen bearings. This Plan does not anticipate cutting up or scrapping the body of 3299. A portion of the funds available for 3321 will be shared with 3299. Additional volunteer time will be required to move this project forward. Project Coordinator is Sam Bartlett.

We had a contractor blast and prime both cars. Volunteers painted 3321's roof and upper body. We bought window glass for all the 3321's windows.

BAR coach 230, “American Flyer”

This car will receive exterior volunteer painting to its BAR original paint scheme. Funds have been allocated for the exterior painting. The scraping of its roof will continue in preparation for application of rust-inhibiting paint. If additional financial resources are obtained, the long-term plan for this car envisions restoring part of the interior to its appearance as a Maintenance-of-Way camp car, with beds and kitchen facilities. Another section will be set up to display tools used by Maintenance-of-Way workers. This car eventually needs extensive body panel replacement. The PCC Trolleys Project takes precedence over this project. Project Coordinator is Sam Bartlett. This project will require additional funding.

Little progress has been made on this Project.

F&L St Ry No. 60

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

Acquisition of the “Berkshire Hills” has changed the Board's interest in this car. We could see about acquiring a portion of it for preservation.

Second Operational Trolley Car

We feel that to support our **Interpretive Rides** Program, we should not be solely reliant on No. 10. We have been offered the use of a “soon-to-be-restored” trolley from another organization. We will continue to monitor this car’s restoration progress. The **Car Barn Extension Project** will support this Project since the loaned car will need to be kept under cover. Meanwhile, we will keep a lookout for any other suitable car that might become available for operation sooner. Project Coordinator is Sam Bartlett. No funds have been allocated for purchasing a second trolley car.

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

B&M Box Car

We will pursue grants of at least \$17,000 for prepping and painting this car back to its B&M blue scheme. This car will continue to be used for storage. Project Coordinator is Sam Bartlett.

We had a contractor blast, prime and paint this car in 2022. The blue top coat was apparently inadequate because it has faded quickly in places. Our volunteers will apply another coat of blue before the car is lettered for B&M, with one side being the large logo and one side being the small logo.

HT&W Flat Car

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

Substantial progress has been made on prepping, priming and painting this car. Wood for the deck has been purchased and is drying under cover in my barn.

Speeder

Our Speeder, on loan from Harvey Allen, will be maintained to be safe and operable. Minor upgrades will be made to make the Speeder more safe and operable than it was in its original condition, without changing the historic nature of the artifact. We will explore how best to incorporate the Speeder into our Interpretive Rides Program, without negatively affecting the other rides. Funding has been allocated for this Project. Project Coordinator is Nash Bly.

A radio, lights and other safety appliances have been added to the CV speeder, along with minor repairs. It has operated reliably when used. We operated "Speeder Days" once a month for the last few years. Guests have been excited to ride the speeder. Sometimes we use "our" speeder but often we use Carl Carlson's. "Speeder Days" is somewhat constrained by crew availability.

Boom Truck

This truck needs to have its swing mechanism repaired. It is unclear how feasible this is. Meanwhile it is useful as a dump truck. Some funds have been allocated for this work. We do not want to spend money on this truck beyond what is needed to keep it operational and safe. This truck supports the **Track Rehabilitation, Car Barn Extension and Track Extension Projects**. Project Coordinator is Sam Bartlett.

The power steering has been repaired. A new gear is being fabricated by our volunteers for the boom truck's swing mechanism. Recent acquisition of a Grove crane makes this Boom Truck crane somewhat redundant, but since much of the Boom Truck work was already underway, we feel it will be useful to finish the swing mechanism repair. Brake work and other improvements are ongoing as well.

Track Rehabilitation

The House Track needs substantial tie replacement, and some rail replacement to be able to be kept up to standards. We need to address drainage issues along the South and Main Tracks. Tie and Timber replacement on Turnout 1, 3 and 4 are also needed. Some funding has been allocated for this Project but more will be needed if we need to buy new switch timbers or other track material. Project Coordinator is Nash Bly.

The town of Buckland paved the area where their parking lot crosses the Main Track and House Track. This greatly reduced the need to clean out the flangeways when this was a graveled area. Our volunteers replaced timbers and ballast in TO3. We had a grant-funded contractor replace ties and timbers from TO1 to Pole 6, inclusive. We still need to add ballast to this second area, and lift the track to improve the drainage. The "new" tamper should help with this Project.

Track Extension

We want to have more storage track space near the Car Barn, so that ongoing Projects can be close to the shop. We will extend the Loop Track from Turnout 5 alongside the Car Barn, and install TO 9 to allow for a track to extend westward toward

the current end of the North Track. The **Track Rehabilitation Project** takes precedence over this Project. We do not anticipate building the Loop Track or a track down Depot St in this Five Year Plan. No funding has been allocated for this Project. Project Coordinator is Sam Bartlett.

We added about 40 feet to the Loop Track stub to allow for the flat car to be stored near the Car Barn for restoration work.

Building Improvements

Our buildings are an important part of our yard and our visitor's experience, as well as a source of revenue. We want to repair one window in the Office and remove the other window, and repair the siding in that area. We want to paint or stain the Shed. We want to put the final touches on the Car Barn. We will research systems for fire suppression as well as funding for such systems. We want to bring cable-based broadband service to the property. We do not anticipate moving the Visitors Center to the Freight House in this Five Year Plan. Additional funding may be needed for this Project. Project Coordinator is Sam Bartlett.

The Crew Room was finished. We have cable broadband. The Shed has not been stained. There is still a small amount of trim to install on the Car Barn doors. I do not anticipate moving the Visitors Center in the next Five Year Plan but if we get another shut down we could consider renovating the current Visitors Center while shut down. We have a building permit to replace one and remove the other Office windows and repair the siding on that section of the Warehouse, but no work has been performed. Minor slate repair on the Freight House was performed in 2024. The Art Garden is planning a major renovation of the space they are occupying, which now includes all of the Warehouse building not occupied by us. Their plan includes new windows, Elm Street entrance, insulation, solar panels on the roof, structural improvements and interior reconfiguration.

Car Barn Extension

We will extend the Car Barn another 40 feet eastward, full width, to create a 100'x40' Car Barn that can store four trolley cars. We will add lifting equipment in the extension to allow inspection and restoration work to take place on the undersides of cars, and to allow removal of trucks. We will add more shop space and explore the option of building a raised storage area over the shop space. We will bring a water line into the building for future fire suppression and for a wash station.

Funding for this Project has been raised, although rising costs may require more funds. Project Coordinator is Sam Bartlett.

This Project is essentially complete! It has passed inspections and been put to immediate use. We have not built the raised storage space yet. The lifting equipment will have to be a separate project, as needed.

Transportation Bulletin Update and republish

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

No progress on this Project.

Visitation Survey

We will create a computer-based survey for use by our visitors to collect information that we can use to improve our outreach and operations. This Project supports the **Interpretive Rides, Visitors Center, Member Outreach, Public Outreach, Educational Outreach, Volunteer Retention and Recruitment and Visitor Experience Programs**. Sam Bartlett is the Project Coordinator.

No progress on this Project.

Restoration Shop, Metalworking and Carpentry

Our need for a designated, well equipped, and organized restoration shop has been apparent.

We will prepare for and build a metal working shop on the north side of the Car Barn Extension which will include a space for our machine tools and a fabrication station for welding, torch cutting, and grinding. We plan to continue to acquire more tools and machinery as needed to enable us to perform a large variety of restoration and maintenance work in house.

We will clean up and organize our wood shop in the freight house. We will improve working conditions by adding a dust collection system and better work space such as a woodworking bench. Our woodworking tools will be inventoried, missing or broken tools will be either repaired or purchased to provide a wide range of project capabilities for woodworking.

This project supports the **Restoration Program**. Josh Redenz is the Project Coordinator. This Project requires funding that can probably come from periodic transfers from surplus funds.

This program is ongoing. The metal working shop is in place. We are looking for a milling machine and a shaper. We used this space extensively for restoration of the trucks for the "Berkshire Hills". Some work has been done in the wood shop, but more organization of the work space is needed. We acquired a table saw and planer, both of which have been put to use.

Locomotive or Trackmobile

We wish to acquire a locomotive or Trackmobile to be able to move our collection of on rail equipment around our museum grounds. We have determined the need to own a locomotive so that we can ensure that we always have the option to move the larger rail equipment around. This will also allow us to train crew members of the museum in the operation and maintenance of the locomotive or Trackmobile This project will support

the **Interpretive Rides Program** by adding the option of more regular rides in the caboose. It will support the **Freight Yard Program** by allowing us to periodically change the arrangement of rolling stock displays keeping the appearance engaging to the visitors. And it will support the **Volunteer Retention and Recruitment Program** by offering new training possibilities. Finally, it will allow us to perform switching required for restoration projects.

Josh Redenz is the Project Coordinator. This Project requires substantial funding that is not yet allocated.

In 2023 Seashore Trolley Museum donated MBTA Line Car 3283 to us, which we accepted with the anticipation that we could use it as a locomotive. It needed much more work than expected and will not be operable for several years.

In 2024 the MBTA donated a Trackmobile model 8TMD to us. It is operational but needs some work on sanders and brakes. Once fully operational, this fulfills our need for moving rolling stock around the yard.

The Mad River & NKP RR Museum has offered us their B&M Alco S5 diesel switcher. This unit would fit our mission well, but would be expensive to move and unload with the current lack of connection to Berkshire & Eastern rails. MR&NKP will let us know if another party expresses interest in the S5.

Final Report Conclusion: *We were able to meet many of our goals and some remained elusive. We can close out the Car Barn Extension Project. I think we should continue to support our existing Programs as we did the last five years. Except for the Projects that are completed, I suggest that most of the Projects continue as laid out above. Additionally, we ought to add some new Projects, like restoration of the Line Car and the “Berkshire Hills”, and repair and Preventative Maintenance for the Grove Crane and the tamper.*