

# **FIVE YEAR STRATEGIC PLAN**

## **ELGIN COUNTY RAILWAY MUSEUM**



225 Wellington Street  
Box 20062  
St. Thomas, ON N5P 4H4  
519-637-6284

**Submitted by: Strategic Planning Committee**

**Mike Baker**

**Elaine Catchpole**

**Grant Hughson**

**Nancy Mayberry**

**George McNally (chair)**

**George Neate**

**John Parsons**

**Robert Weare**

**Ron Bareham (ex officio)**

**Laurence Grant (staff)**

**December 4, 2009**

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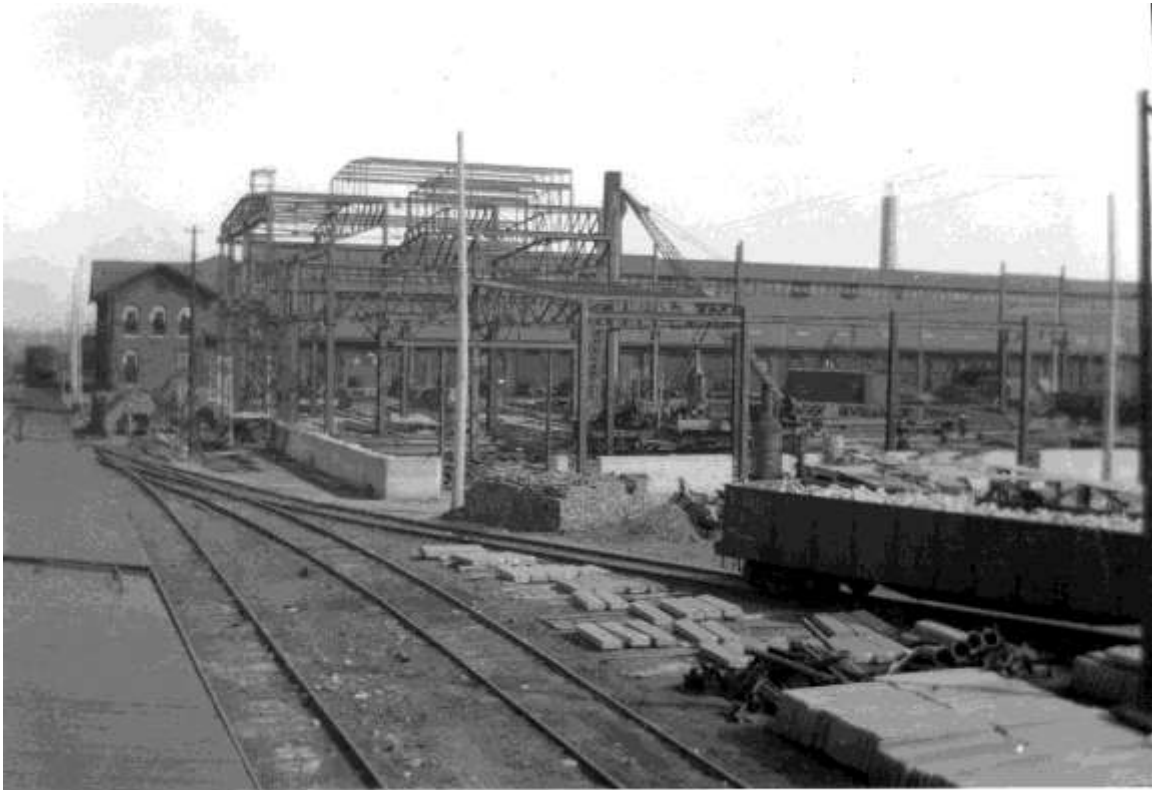
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Ministry of Culture Space Allocation Recommendations  
Recommended Practices for Railway Museums  
Newspaper Clippings on the Strategic Planning process  
Letters Patent  
By-Laws  
Financial Summary  
Performance Measures Template



**LOCOMOTIVE SHOP CONSTRUCTION - THE SIRMAN COLLECTION**

Michigan Central Locomotive Repair Shops under construction, 1912



Exterior south-east corner of the Elgin County Railway Museum, 2008, Courtesy Elgin Tourism Services

## Document Objective

This document summarizes the results of a strategic planning process which began in 2007, quite humbly, with the participation of the president of the Elgin County Railway Museum in a strategic planning workshop. It was subsequently felt by the organization's executive that the museum could benefit through an engagement with a strategic planning process. Such could serve as a means of resolving a number of issues that it was facing related to volunteer recruitment (especially amongst youth), professionalization, meeting Ministry of Culture standards for museums, facility deterioration including the museum's status as a tenant, audience development, community interaction and future budgetary challenges.

It was realized by many in the community that the Elgin County Railway Museum was at a crossroads in its development with a deteriorating building which it had occupied but not owned for over 20 years. Redevelopment of the former Michigan Central Rail yards had begun following the sale of the former Michigan Central Station to a non-profit organization and a parcel of land for the construction of a new arena for the City of St. Thomas. The development arm of the Canadian National Railway had undertaken discussions for the potential sale of additional property. The context for these developments was the abandonment of the former Canada Southern right of way both to the east and west of St. Thomas.

The Railway Museum had a need to determine its future within the existing building, which it was renting from CN, or to relocate to another facility. The organization

### Key Issues:

- *Volunteer recruitment, especially among youth*
- *Professionalization*
- *Meeting Ministry of Culture Standards for museums*
- *Deteriorating building*
- *Status as a tenant*
- *Audience development & community interaction*
- *Budget development*

Museums are institutions created in the public interest. They engage their visitors, foster deeper understanding and promote the enjoyment and sharing of authentic cultural and natural heritage. Museums acquire, preserve, research, interpret and exhibit the tangible and intangible evidence of society and nature. As educational institutions, museums provide a physical forum for critical inquiry and investigation.

Museums are permanent, not-for-profit institutions whose exhibits are regularly open to the general public. This definition encompasses institutions that pursue similar objectives and accomplish most or some of a museum's functions.

Canadian Museums Association

also had to face

several other issues, such as the aging volunteer force, its role in relation to similar rail organizations, whether or not to professionalize through the hiring of permanent staff, and to seek funding sources that would permit such developments.

With the assistance of the County of Elgin's Department of Community and Cultural Services, a funding application was made to the Ontario Ministry of Culture's Cultural Strategic Investment Fund. The application envisaged a three part strategic planning process – a facility review to be undertaken by an architectural firm, an operational analysis to be undertaken

by internal and external volunteers familiar with the organization, and a public support analysis to be undertaken by a firm with expertise in public consultations.

The grant application specified a scope of activities that would include,

- a needs assessment of the current building – cost of work for the present building, assessment of alternate sites, costing of a new facility
- an operational analysis of collections, exhibitions and programming needs, including costing of improvements and identification of staffing requirements, all in relation to meeting provincial museum standards
- a public support analysis with a focus on the degree of public support and awareness, the potential for collaboration with like organizations and the development of youth and broader community volunteer support

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## Planning Process

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A Strategic Planning Committee consisting of board members and general members of the Elgin County Railway Museum and North America Railway Hall of Fame was formed in December of 2007. A committee chair and secretary were selected. The Elgin County Museum curator served as a professional advisor to the Committee. He also drafted a grant application for submission by the Railway Museum with input from the committee. The membership of the Railway Museum approved the 50% funding requirement for the Ontario Ministry of Culture grant, which would leverage funding for a \$30,000 project. The committee also developed a revised mission statement for submission to the membership. Once the grant application was approved, the committee met regularly to further the objectives of the grant, but more particularly, to take responsibility for the operational analysis component, which included the striking of subcommittees. Subcommittees in the areas of collections, exhibitions, education and governance/funding began producing assessments covering strengths, weaknesses and steps to be taken for improvements and adherence to Ontario Ministry of Culture museum standards. The historian for the North America Railway Hall of Fame joined the process in May of 2008 and in February of 2009, was hired on a part time basis as the Strategic Plan Coordinator in order to facilitate the process.

The public support analysis (Sue Smith & Associates) was initiated in June of 2009 and the facility review (firm of SJMA inc. – Ed Vandermaarel) in May of 2009. Their analyses are detailed in separate reports, but executive summaries are included with the Five Year Strategic Plan.



ST. THOMAS SHOPS - CIRCA 1920 - THE SIRMAN COLLECTION



Interior view, 2008, Courtesy Elgin Tourism Services

## Background

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### Organizational History

The Elgin County Railway Museum has been organized since 1988 as a non-profit corporation (without share capital) with letters patent dated February 8, 1989. The museum serves St. Thomas and Elgin County, and visitors to the area. This community's economic development, beginning in the third quarter of the 19<sup>th</sup> century, was strongly influenced by the arrival of American railways. Since its inception, the museum has been housed in the Michigan Central Locomotive Repair Shops building, which was constructed in 1913 and was a part of a 309 acre parcel of land once owned by the Michigan Central Railroad (the building itself consists of approximately 52,000 square feet)<sup>1</sup>. This parcel once contained a round house, power house, and numerous other buildings used to conduct railroad business. The only other buildings still remaining are the Michigan Central Station (built as the Canada Southern Station in 1873) and the BX Tower (owned by the City of St. Thomas).

During its 20 year history, the Railway Museum has maintained a seasonal operation, hiring summer students during the months of May through August. Volunteers have provided training in the form of building and collection interpretation, collections management and the conduct of special events. Volunteers see to many other facets of the museum's program – restoration of cars and locomotives, maintenance of the buildings and grounds, gift shop and special events. It is through their dedication to the concept of a railway museum for St. Thomas and Elgin County, as a witness to the importance of the number of American and Canadian railways that provided employment and economic prosperity, that a collection and building exist that tells this story.

### Profile of Services

The Elgin County Railway Museum provides museum services as they relate to the rail history of St. Thomas and Elgin County. These services include exhibits of historic locomotives, passenger and freight cars, the restoration/conservation of rail equipment, facility tours, permanent exhibits of rail artifacts and special public events.

The Museum cooperates with other similar St. Thomas and Elgin County organizations such as:

- The Southern Ontario Locomotive Restoration Society (SOLRS) – storage and restoration space for equipment
- Port Stanley Terminal Rail – winter storage of rail cars, some cooperative programming
- North America Railway Hall of Fame – cooperative programming, some shared volunteers

### Mission Statement

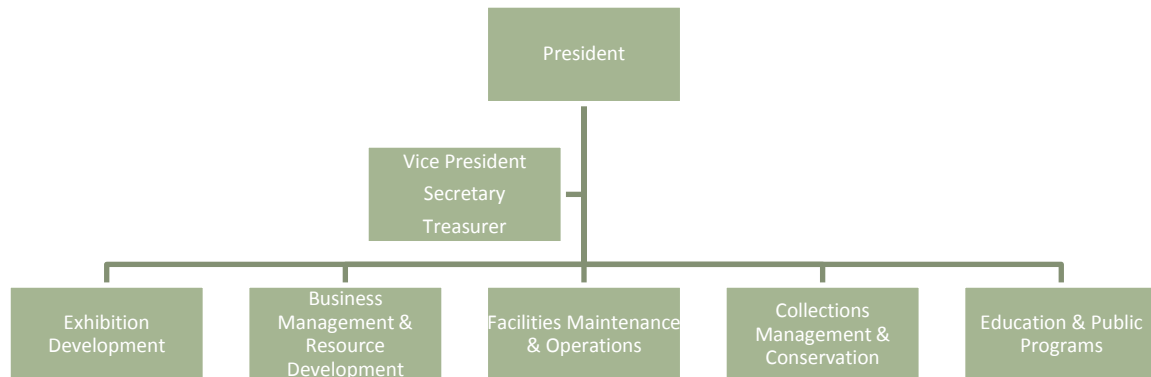
To preserve, teach and display to the public the rich heritage of the railroads and their role in the development of St. Thomas and Elgin County, through the operation of a museum that meets Ministry of Culture standards (Board and membership approved, Dec. 6, 2008)

*The museum is in need of professionalization through adherence to contemporary railway museum practices, Ontario museum standards and policies.*

The objects for which the corporation is incorporated are stated in the letters patent (Feb. 8, 1989):

1. To encourage research into the history of railways servicing the people of Elgin County and the City of St. Thomas
2. To secure and preserve an accurate account of the progress and development of railways in the said County and City
3. To promote public interest in the history of railways in the said area
4. To maintain a Museum as a repository for railway equipment, relics and artifacts

### Current Organization Chart Elgin County Railway Museum



### Contact List – Strategic Planning Committee

Name	Title	Telephone Number	E-mail Address
Ron Bareham	President, ECRM and ex-officio member of the SP Committee		
Mike Baker	Curator	519-631-1460	<a href="mailto:mbaker@elgin-county.on.ca">mbaker@elgin-county.on.ca</a>
Elaine Catchpole	Secretary, ECRM		
Laurence Grant	SP Committee member until February 2009 and subsequently staff <sup>1</sup>	519-633-2535	<a href="mailto:laurencegrant@narhf.org">laurencegrant@narhf.org</a>

**Strategic Planning Committee Five Year Strategic Plan**

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Grant Hughson	SP Committee member (with assistance from Kelly Payne)		
Nancy Mayberry	SP Committee member		
George McNally	Chair, SP Committee		
George Neate	Chair, SP Committee until February 2009		
John Parsons	SP Committee member		
Bob Weare	SP Committee member		

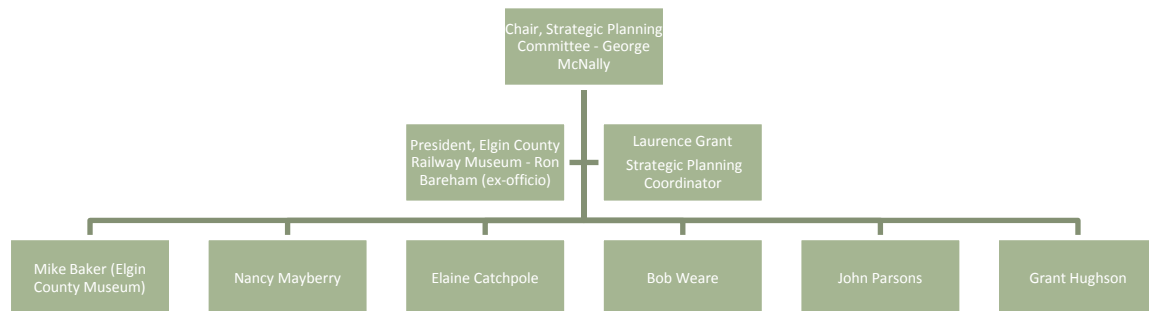
**Contact List – Architectural Firm**

Name	Title	Telephone Number	E-mail Address
SJM Architect	Ed Vandermaarel, Partner, Heritage Consultant	519-649-0220	<a href="mailto:edv@arch-pm.com">edv@arch-pm.com</a>
SJM Architect	Erica Mitchell Tim Castle	519-649-0220	<a href="mailto:emitchell@arch-pm.com">emitchell@arch-pm.com</a> <a href="mailto:tcastle@arch-pm.com">tcastle@arch-pm.com</a>

**Contact List – Public Support Analysis**

Name	Title	Telephone Number	E-mail Address
Susan E. Smith, Smith & Associates	Planning & Research Consultant	519-631-7222 Fax 631-7721	<a href="mailto:fortin-smith@sympatico.ca">fortin-smith@sympatico.ca</a>
Laurence Grant	Strategic Plan Coordinator	519-633-2535 Fax 633-3087	<a href="mailto:laurencegrant@narhf.org">laurencegrant@narhf.org</a>

## Organization Chart Strategic Planning Committee



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## Executive Summary – Operational Review

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The Strategic Planning Committee undertook an operation review of the organization with reference to Ontario Ministry of Culture standards for community museums and “Recommended Practices for Railway Museums”<sup>iii</sup>. The Committee developed task forces for five areas of operations:

- Collections / Restoration / Conservation / Storage/ Research: Mike Baker, Bernie Bechard, Charles Beckett, Elaine Catchpole, Bob Weare, Roger Catchpole, John Parsons
- Facility / Site: full committee
- Exhibition: Mike Baker
- Programming: Elaine Catchpole, Laurence Grant
- Governance / Board / Staff / Funding: Ron Bareham, Bob Bierling, Elaine Catchpole, Grant Hughson, Nancy Mayberry

The task forces summarized their analyses in the form of assessments in these functional areas. In each case, operational strengths and weaknesses were analyzed. The detailed assessments are to be found in the appendices. A summary of the work of the task forces follows.

## Collections, Restoration/Conservation, Storage, Research

The collection consists of both large pieces of rail equipment such as steam, electric and diesel locomotives, and smaller artifacts, almost all relating to the rail heritage of St. Thomas, Elgin County and southwestern Ontario. The inventory of the collection, usually referred to as the catalogue, is not complete and does not conform, in many respects, to contemporary practices of record keeping for museums. For that reason, the full extent of the collection is unknown (see appendix 4 for a listing of larger artifacts). The museum is in need of professional collections management guidance in order to make best use of the history associated with materials and to make the best choices over items that could be added to the collection or removed from the collection. Use of the County of Elgin's collections data base, for example, would assist inventorying, research and decision making. A deaccessions exercise will need to be undertaken in order to remove duplicates and items not relevant to the collections management policy. Such an exercise is the norm for any museum that has been in existence for 20 years or more.

The history and ambience of the Michigan Central Locomotive Repair Shops building makes it the ideal context for the exhibition and interpretation of such a collection. The building facilitates restoration processes, a major volunteer activity, storage of large pieces of equipment and an understanding of the importance of rail operations to the St. Thomas and area economy.

### *Recommendations:*

- *Revise required policies and draft new policies for Board adoption to conform to Ministry of Culture requirements*
- *Develop appropriate spaces for collections work and storage*
- *Designate staff and committee responsibilities for collections management*
- *Deaccession surplus materials and conversely, develop collection development priorities*

Restoration services involve a considerable volunteer commitment on the part of an experienced, yet primarily senior, labour force. On the other hand, the advanced state of deterioration of the building makes it less than ideal for the storage and exhibition of other artifacts in the collection such as textiles and archival material.



Artifacts Room, 2008, Courtesy Elgin Tourism Services

## Exhibition

Exhibitions at present consist primarily of longer term, permanent type exhibits of full size equipment and model railway and smaller displays of thematically arranged materials. There is no program of changing exhibits and no volunteer committee charged with doing so. What is on display appears more like open storage rather than as a result of researched attempts at making the collection intellectually accessible to the visiting public and providing an overview of regional rail history. This approach minimizes the desire for return visits and provides few opportunities to develop education programming and special events based on change. The artifacts are stored as opposed to being exhibited and routinely moved out of the way for special events. Labelling and interpretive material is at a

minimum.

### *Recommendations:*

- *Draft an exhibition policy and establish committee responsibility*
- *Establish a 3 year exhibition plan*
- *Develop collaborative exhibitions with other organizations*

A major exhibit consists of a detailed HO scale model representation of the railway lands in the City of St. Thomas and other parts of the County including the Port Stanley incline railway, the cars from which are on the museum grounds. The model has won wide recognition for its detail and remains one of the most popular parts of the museum. Between the model room and the artifacts room visitors pass other larger artifacts such as maintenance of way track vehicles and baggage carts.

The building itself is the museum's primary exhibit, but unfortunately is not interpreted. The restoration processes, as well, form an interesting live exhibit but are not easily viewed by the public. Access to the building and the collection is limited due to roof deterioration which became noticeable in 2005 with the collapse of a concrete roof slab. This incident restricted public access to one quarter of the building, effectively eliminating access to the most interesting parts of the collection of engines and rolling stock.

*The board needs to develop an outward community-based focus in its activities: exhibitions, education programs, special events, governance. Museums are, according to the definition of the International Council of Museums, "in the service of society and its development".*

The other main exhibition area, known as the artifacts room, holds a collection of materials related only by their connection to the railways that operated in St. Thomas or to the people who worked on them. This area also serves a retail function for the gift shop, as an administrative and reception office, meeting space and a railway employee honour wall. Access from the outdoors is directly into the artifacts room without a temperature or humidity buffer.

Progress with exhibit development could result from a written exhibition policy, a yearly budget, and a three year exhibit plan. These are norms of other Ontario community museums and of railway museums and could advance funding opportunities.



Model display room, 2008, Courtesy Elgin Tourism Services



Museum interior spaces, 2008, Courtesy Elgin Tourism Services

## Governance

In spite of administrative crises over its 20 years of existence, the board has functioned with letters patent and by-laws that have ensured a longer-term survival. The museum founders were inspired by a need to preserve the railway history of St. Thomas and area, a history so fundamental to the community's growth. A recurring theme over this time period has been uncertainty over the future ownership of the former

*Board and volunteer, especially youth recruitment are essential to future survival.*

### *Recommendations:*

- *Create a board policy manual, such to include a commitment to ethical behaviour*
- *Policies should comply with the requirements of the Ontario Ministry of Culture Standards for Community Museums and Recommended Practices for Railway Museums*

Michigan Central Locomotive Repair Shops building. This has impeded the further development of the organization through inadequate funding and lack of adherence to museum norms of policy and professional development. Staffing has been limited to summer student hiring and a continuity of knowledge is assumed exclusively by volunteers involved in the various administrative, collections and program areas. The issue of staffing leadership, continuity and coordination needs to be addressed.

The board is in dire need of a policy manual and good practices of board recruitment and orientation. Both Ontario museum norms and those of North American railway museums

need to be addressed for enhanced funding and professionalization. A number of provincial and federal funding programs are being missed through lack of administrative capacity.

## Funding

Fund development requires a longer-term view of the museum's requirements rather than a year-to-year approach. With the current recession, infrastructure funds are available but the museum does not seem to be ready to capitalize on them. A drawback is the full reliance on the board for taking initiatives and a complete lack of staff expertise to develop multi-year strategies. This has resulted in a lack of typical planning documents that are required by funders: five year plan, capital plan, strategic plan, revenue generating plan, etc. It is also difficult to get community members involved if there seems to be no longer-term strategy and vision for the museum's development.

*Full time professional staff is required to coordinate a fund development program, professionalization, and effect good administration.*

*Recommendations:*

- *Develop fund related policies: finance, sponsorship, gift shop, purchasing and establish committee responsibility*
- *Develop a strategy for obtaining project and capital funding from federal and provincial sources*
- *Develop a five year capital budget*
- *Develop a revenue generating strategy*

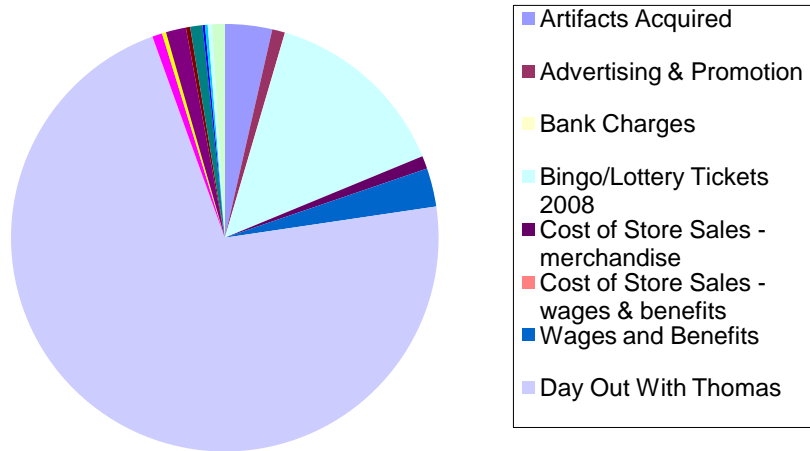
What has been lacking since the founding of the museum is professional guidance. A perceived lack of funds has impeded a professionalization, but the lack of staff has impeded an access to such funds as the Community Museum Operating Grant Program of the Ontario Ministry of Culture. During the last 20 years, other Ontario museums have become clients of this program through adherence to Ministry of Culture standards for community museums. Such standards are achieved through following policies developed for collections management, collection development, conservation, research and other areas. Volunteers have been a great source of strength for the museum and the collection we see today would not otherwise have been possible. However, the museum has not been able to get beyond a threshold of exclusive reliance upon a volunteer base. This base is also shrinking and attracting youth involvement is a major concern for all arts/heritage and community organizations. Crossing this

threshold will open access to government funding programs, but the door will have to be opened with caution in order to maintain a balanced budget.



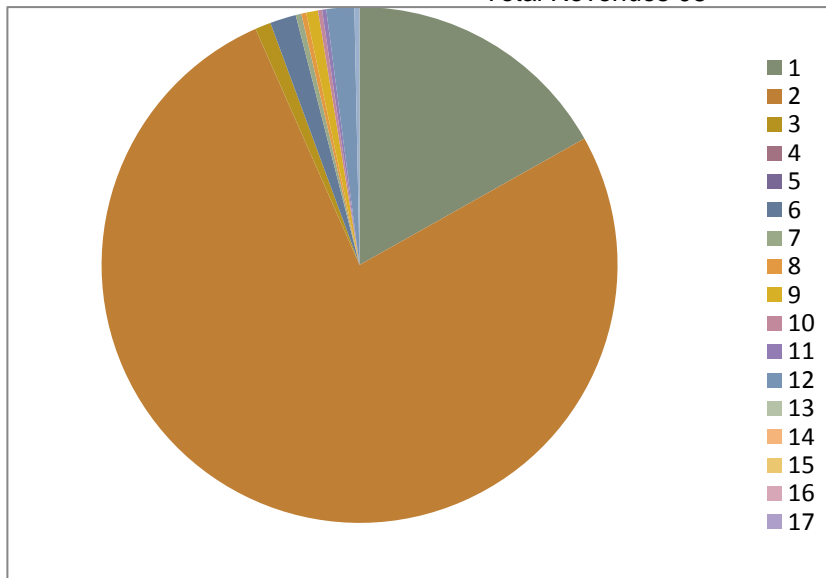
Michigan Central Yards, circa 1925, Courtesy Elgin County Archives

Total Expenditures 08



These pie charts were compiled from information available in the 2008 financial statement. It profiles the degree of effort required in various areas of operations. "Day Out with Thomas", for example, represents more than three quarters of museum expenditures. Other more typical areas of museum expenditures represent very small slices of the pie. Please see the financial attachment for a compilation of expenditures and revenues over the past five years and projections for the coming five years.

Total Revenues 08



1 Bingo/Lottery Tickets 104,039 2 Day Out With Thomas 472,591 3 Donations 6,113 4 Admissions 5 Education Programs 6 Donations artifacts 10,085 7 Heritage Days (net) 2,187 8 Memberships 1,920 9 Miscellaneous 4,581 10 Nostalgia Days (net) 1,582 11 Litigation Settlement 1,582 12 Store Sales 10,768 13 Summer Career Placement Grant 14 Trillium Foundation Grant 15 Heritage Organization Development Grant 16 Job Creation Partnership indirect staffing support 17 Job Creation Partnership overhead 18 ACFO Grant 1,984

## Executive Summary - Facility Review



ST. THOMAS - JULY 1943 - NYC PHOTO

### Architectural Approach

As in any historical restoration, the architectural challenge is to maintain the integrity of the existing building while upgrading the facility to suit the new programmatic requirements. In addition, the building will require significant intervention to meet current building code and life safety standards.

Northern-most bays of the building could be retained for restoration work. These bays are to be separated from the main museum space by a viewing window to limit public exposure to any hazardous materials.

Although the structure of the building appears solid, upgrades must still be carried out. It is expected that significant work will be required to restructure the existing roof assembly and to make the building water tight. The existing doors and windows are to be retained and restored, although some locations may be altered to suit the museum layout. All new materials and finishes added to the building will be sympathetic to the historic structure.

Despite the inherent challenges with upgrading a historical structure, the existing building is well suited for the Elgin County Railway Museum and has significant potential.



Exterior, 2008, Courtesy Elgin Tourism Services



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## Public Support Analysis - Executive Summary

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*The following consists of Section 17 of the Public Support Analysis” for the Elgin County Railway Museum, conducted by Smith & Associates and submitted to the Strategic Planning Committee in November of 2000.*

The ECRM Public Support Analysis was completed by Susan E. Smith of Smith & Associates by means of a five phase process and several methods largely based on self-administered questionnaires, meetings, reporting, a power point presentation and brochure. The analysis was intended to determine participation and expectations of ECRM participants, suggestions for improvement and future development, perceptions and potential financial support.

There were seven respondent groups and a total of 179 respondents. The results from the ECRM Board of Directors and members (49 respondents), Heritage Rail Community (50 respondents) and Governing Bodies, County staff and Committee members (19 respondents) for a total of 118 respondents were analyzed together since similar questions were asked of each group. That analysis covers most chapters of the report and all intended objectives. The remaining four respondent groups were analyzed separately and included results from funding agency representatives (3 respondents), educators (5 respondents), Day Out With Thomas participants (35 respondents) and ECRM visitors (18 respondents). As such, this summary will largely focus on the first three groups and the remaining four will be presented individually following this.

### ECRM MISSION STATEMENT

The majority of respondents (75%) believe that the Mission Statement reflects the future vision of the ECRM. For those who did not feel this way, the references to the Ministry of Culture and to standards which most people would not know were the main reasons given.

#### OBJECTS OF THE CORPORATION

The very high majority (86%) contend that the four, original objects are still relevant; however, some suggestions for changes or additions were provided.

#### AWARENESS OF AND PARTICIPATION IN EXISTING ECRM PROGRAMS

The majority of survey participants are aware of ECRM events particularly DOWT, Railway Heritage and Railway Nostalgia Days. They learned of them through word of mouth, newspaper, promotional material, signage and the website (in that order). Most respondents (91%) have visited the museum at least once or twice per year with many attending in 2009 and during Nostalgia and Heritage Days, DOWT and for tours and open houses.

#### ECRM PROGRAM SATISFACTION AND PERCEPTIONS

While most respondents (79%) are satisfied with ECRM programs, services and events, several are somewhat dissatisfied or in the middle. The reasons are mixed between positive and negative. The respondents generally like the impressive rolling stock, locomotives and equipment, the authentic shop, knowledgeable tour guides, dedicated, friendly volunteers and educational value. They do not like the state of the building and its need for repair and the restricted shop area.

In terms of the exhibits, survey participants like the scale, authenticity and realism of the train artifacts, the fact that they are well displayed, organized, maintained, interesting and identifiable, the rolling stock is excellent and operational, exhibits are educational, informative and interesting and restoration is well done, accurate and true to prototype. The respondents do not like the effect of the structural problems on the exhibits since it leads to overcrowding and effects presentations, collections are mainly static rather than incorporating modern technology and the dirt and junk at the museum presents a disorganized image. Signage is poor and insufficient and better labelling with increased information is required.

#### PARTNERING WITH OTHER ORGANIZATIONS

The majority of survey participants (60%) are interested in partnering with other organizations. The PSTR for Day Out With Thomas, train rides, tourism and events as well as NARHF for Nostalgia Days, tourism and similar events were most often mentioned.

#### EXPECTATIONS/SUGGESTIONS FOR PROGRAMS/SERVICES/EVENTS AND FUTURE DEVELOPMENT

Generally, the majority of respondents do not have any suggestions for improving ECRM program, services and events; however, several respondents were able to provide a range of ideas. More modernization in the form of state-of-the-art, interactive exhibits and electronic media usage were most often mentioned as well as the pursuit of younger volunteers and greater marketing, promotions and partnerships to facilitate increased tourism opportunities. Most survey participants did not believe or did not know if there are any existing programs that should no longer be provided. The small number that did suggested that Nostalgia and Heritage Days be revitalized.

Similarly, the majority of respondents are unaware or do not know of any programs or events that they would like to see the ECRM offer. Some suggested educational programs, train rides or interactive displays. The same holds true for future programs that should not be undertaken by the museum. Risky and competitive ventures and un-needed equipment were the few endeavours that should not be pursued.

Not surprisingly, the short term future development suggestions referred largely to the repair and renovation of the building as well as the formation of partnerships, acquisition of the building and land and a membership drive to attract younger members.

Long term future development ideas were more far reaching and include the museum becoming an important tourism destination perhaps in the context of a Theme Park, a nationally recognized, state-of-the-art museum and a museum with steam and/or diesel excursion train rides.

A slight majority of respondents (57%), particularly among the ECRM Board and members, are willing to provide financial donations to the museum, most often in the \$100+ category, once ownership is secured. The majority of respondents did not indicate an actual financial contribution amount.

#### BUILDING LOCATION AND DESIGN

The majority of respondents (70%) prefer that the building is renovated rather than rebuilt and the very high majority (90%) contend that the ECRM should remain at its current location mainly because of the historical significance/railway heritage of the building, its central location and because it is a railway artifact.

Satisfaction with the ECRM is mixed and this is not surprising. Those satisfied like the historical significant of the building, the repair shop and its scale and authenticity while the dissatisfied point to the disrepair and condition of the building, its roof and windows.

In terms of the design and layout of the space, there are those than like everything including the display space and flow of the exhibits as well as the spaciousness and others that point to the space limitations due to the roof problems and the restricted area, the absence of proper space for offices and administration, an appropriate entrance/visitor reception area, storage space and the cluttered state of the space.

The top five preferences for new or improved spaces include: interactive exhibits, static exhibits, refreshment area, retail space and library. The top three priorities for the ECRM building include: roof, windows and repair/renovation and the most important issue is the roof. These are not surprising given the museum's condition.

#### VISITS TO OTHER RAILWAY MUSEUMS

The majority of respondents (76%) have visited another railway museum. Those most often mentioned include the Komoka Railway Museum, The Halton County Radial Railway, the Fort Erie Railroad Museum, Exporail, and Smith Falls Railway Museum.

#### ADDITIONAL COMMENTS

Beyond complimentary comments, the additional comments more often referred to the need for younger members and training for them.

#### SURVEY OF FUNDERS

Only three respondents replied to the survey. The funding programs available include the Infrastructure Stimulus Fund (IFS) for capital improvements for non-profit organizations; the Trillium Foundation grant which also supports capital costs and is ongoing if requirements are met; the Community Museums Operating Grants (CMOG) to assist with salaries and benefits if eligibility criteria is met including existing business plan, sustainability options, outcomes etc.; the Heritage Organization Development Grant (HODG); Museum and Technology Fund; Cultural Strategic Investment Fund and Summer Experience Program Grants.

### SURVEY OF EDUCATORS

There were five educators who completed the on-line questionnaire and who suggested several elementary courses which could be offered by the ECRM. These courses covered areas such as the impact of the railways on historical and economic development, transportation, energy, math and geography with a preference for age appropriate material, fast paced with hands on activities, a safe environment and accessibility to shorter individuals since they are children. There was also a suggestion for adult education to provide training in engine repair and restoration.

Most of the educators mentioned that each course should comply with Ministry of Education Curriculum Guidelines as a means of justifying field trips, supporting the curriculum in the classroom and enhancing the mandated curriculum. Courses on-site at the ECRM and off-site in the school classroom were both preferred depending on the type of program. A comfortable setting with chairs, tables, a presentation board and close, convenient restrooms were recommended as well as “living” museum spaces, interactive exhibits which allow students to manipulate resources and an open concept area for discussions, computers etc. The cost per student to attend museum educational programs was determined to be in the \$2.00 - \$5.00 range. There was a further suggestion to potentially partner with the Pioneer Museum, Public Library or the Art Gallery for a two part day.

### SURVEY OF ECRM VISITORS

A brief questionnaire was completed by 18 visitors to the museum. Almost all respondents were satisfied (50% Very Satisfied; 44% Somewhat Satisfied) with the ECRM and those 17 individuals would recommend the museum to others. The high majority of survey participants (83%) would prefer renovation of the building and the same 15 respondents contend that the ECRM should remain at its current location mainly due to its heritage nature and convenient location. The top preferences for new or improved spaces include a refreshment area, interactive exhibits, static exhibits and exterior parking (in that order). The visitors particularly liked the knowledgeable, friendly staff but did not like the cold building and restricted area.

### SURVEY OF DAY OUT WITH THOMAS VISITORS

A short survey was completed by 35 visitors. All of these respondents were satisfied (57% Very Satisfied; 43% Somewhat Satisfied) with the event and would all recommend the event to others. Most respondents (86%) indicated that they would attend this event again. The majority of visitors surveyed particularly liked the train ride, variety of activities, the Thomas train and the well organized nature of the event. There was very little that participants did not like about Day Out With Thomas except the weather and there were some suggestions for more food venues and seating to accommodate this. It is apparent from this small sample and the numbers attending, that Day Out With Thomas is a very successful event.

## 17.2 Recommendations

1. It is recommended that the ECRM Board of Directors consider changing the reference to the Ministry of Culture to “provincial” standards or “Ontario Government” standards.
2. While not crucial given the very high majority of respondents supporting the relevancy of the Objects, it is recommended that the ECRM Board of Directors consider expanding the Objects of the Corporation bearing in mind suggested additions and changes.
3. It is recommended that the ECRM Board of Directors investigate ways of revamping Nostalgia and Heritage Days as a means of increasing participation and user satisfaction and initiate these changes.

4. It is recommended that the ECRM Board of Directors consider ways and means of changing existing displays and improving their appearance to add variety and to increase visitor satisfaction.
5. It is recommended that the ECRM Board of Directors seek advice on increasing and improving signage and labelling.
6. Once the building has been secured, it is recommended that a major clean-up of the ECRM be undertaken.
7. It is recommended that the ECRM Board of Directors initiate controls to preserve the museum artifacts in consultation with the Elgin County Museum Curator.
8. It is recommended that the ECRM Board of Directors continue to partner with PSTR and NARHF for existing programs and events and to investigate opportunities for increased co-operation and partnering.
9. It is recommended that the ECRM explore the potential to partner with other organizations like SOLRS, the Downtown Development Board and the Elgin County Museum and decide whether to pursue any options available.
10. It is recommended that the ECRM Board of Directors initiate a membership drive with the aim of recruiting young members.
11. It is recommended that the ECRM Board of Directors begin to gather information on potential interactive exhibits, virtual displays and computer simulation with a focus on railways.
12. It is recommended that the ECRM Board of Directors consider professional opportunities for the marketing, advertising and promotion of ECRM events including electronic and other modes.
13. It is recommended that the ECRM Board of Directors pursue personal contributions to the ECRM once ownership of the building and land has been obtained.
14. It is recommended that the ECRM building be renovated rather than rebuilt consistent with respondent preferences.
15. It is recommended that the ECRM remain at its current location given the very high majority of respondents supporting this.
16. It is recommended that the ECRM Board of Directors undertake renovations to the building beginning with the roof and windows given respondent priorities and the museum needs.
17. Following the renovations set out in Recommendation 17, it is recommended that the Board of Directors initiate a major cleanup of the building and remove the barrier/restricted area.
18. It is recommended that the redesign of the interior space of the building and any expansion take into account the top preferences for new or improved spaces as well as the identified need for office space.
19. It is recommended that the ECRM Board of Directors pursue funding to hire full-time, professional and support staff.
20. It is recommended that the ECRM Board of Directors keep abreast of available funding programs and eligibility criteria and where possible secure funding for capital improvements and/or museum operations.
21. It is recommended that the ECRM Board of Directors explore potential on-site (at the museum) and off-site (in the classroom) educational programs that could be offered by the ECRM considering the information collected on this subject from educators.
22. It is recommended that the ECRM Board of Directors ensure that all museum courses are designed and delivered in compliance with Ministry of Education Curriculum Guidelines and expectations to make these courses more marketable to educators.
23. It is recommended that the ECRM Board of Directors consider the cost per student for course delivery in the \$2.00 - \$5.00 range.
24. It is recommended that the ECRM Board of Directors review the preferences of educators for teaching space with the Architect so that the classroom design meets the needs of educators.

CASO-MCRR Machine Shop & Blacksmith Shop (S.E. Corner)  
St. Thomas, Ont.  
July 15, 1943 NYC/CH Photo  
M.P. McIlwaine Collection



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## Funding Opportunities

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Potential Funding sources include:

- Ontario Trillium Foundation for capital and shorter term operational funding and staffing
- Ministry of Culture for operational funding through the Heritage Organization Development Grant and the Community Museum Operating Grant; the latter is contingent upon adherence to the Ministry's Standards for Community Museums and the availability of funds
- Ministry of Training, Colleges and Universities for Job Creation Partnership funding
- Department of Canadian Heritage for capital and special projects funding: Cultural Spaces Canada, Museum Assistance Program (for museums with full time curators)
- Government of Canada special projects funding such as infrastructure funding
- St. Thomas-Elgin Community Foundation: small grants, generally around \$500 for special projects
- City of St. Thomas: no policy on operating funds and available on a case by case basis; occasional special projects funds upon appeal to municipal council
- Various foundations and business corporations depending on the scope of the proposed project and the mandate of the organizations
- Self-generated revenues through gift shop operations, education programming, food service, short line revenues, admissions, general donations, special events and donations; a potential for expanding the present scope of operations due to increased activity

## Appendices

### Appendix 1 - Implementation Schedule

It should be noted that any implementation schedule needs to remain a fluid document, adjusting to funding opportunities as they arise, the demands of the building fabric and staff/board/volunteer interests and initiatives. The strategic plan and its implementation schedule should be referred to on at least a monthly basis during the course of implementation, making adjustments according to changing circumstances, and initiating capital and operating budgets following an evaluation of past successes and shortcomings. The implementation schedule also includes input from the Public Support Analysis (noted as PSA in the following tables) and the Facility Review. In that light, the Strategic Plan should be an ongoing and a fixed item on board meeting agendas.

Item	Recommendations	2010 Responsibility
Michigan Central Locomotive Repair Shops Building (PSA)	Renovate rather than rebuild the Locomotive Repair Shops building and remain at this location; remove the barrier to the restricted area following renovations, establish office area; consult with educators on the design of education space	Facilities Maintenance & Operations Committee  Board
Funding	Broaden the base of fund development to include strategies for municipal, provincial, federal, foundation and private support, as well as strategies for greater self-generated revenues (membership drive, sponsorships, retail operations, short line revenue, food service, etc.); provincial support to include initially application for a Heritage Organization Development Grant and application to the Trillium Foundation for an administrative staff person; if supervisory staffing is in place, make application to the Job Creation Partnership program  (PSA) Pursue personal contributions to the museum once ownership of the building and land has been obtained; keep abreast of available funding programs and eligibility criteria and where possible secure funding secure funding for capital improvements and museum operations	Board

**Strategic Planning Committee Five Year Strategic Plan**

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Capital forecast	Develop a 10 year capital forecast (there is an immediate need for roof replacement) in the context of a capital campaign; in accord with findings of PSA, begin with roof and windows	Board Business Management & Resource Development and Facilities Maintenance & Operations Committees
Policy review and development	Review and adopt policies to bring museum practices in accord with Ministry of Culture Standards for Community Museums	Committees and Board
Terms of Reference	The new committees developed in 2009 require terms of reference for clarity in their responsibilities	Board
Operational procedures and space allocations	<i>Operational procedures</i> with respect to collections management need to be developed for: accessions and cataloguing, loans - forms need to be developed or updated to facilitate these processes, staff/volunteer training needs to be formalized; collections development and conservation priorities written and a conservation/restoration priorities program developed; a plan must be developed for the complete cataloguing of the collection  Concurrently, <i>space needs to be allocated</i> for collections management activities, the storage of small artifacts and administrative functions	Collections Management & Conservation Committee  Board
Clean-up (PSA)	Initiate a major clean-up of the facility	Facilities Maintenance & Operations Committee
Artifact preservation (PSA)	Initiate controls to preserve the museum artifacts in consultation with the Elgin County Museum curator	Collections Management & Conservation Committee
Budget	A budget should be developed that is aligned with the requirements of the Community Museum Operating Grant program of the Ministry of Culture	Business Management and Resource Development Committee  Board
Staff	Hire a staff person to coordinate the implementation of the Strategic Plan, including facilitating exhibition and education programming development (pending application to Trillium Foundation as noted above; also a recommendation of the PSA)	Business Management and Resource Development Committee  Board
Purchasing policy	Develop a purchasing policy	Business Management and Resource Development Committee

**Strategic Planning Committee Five Year Strategic Plan**

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		Board
Performance measures template	Assure the use of a performance measures template in developing exhibitions, education programs and special events	Business Management & Resource Development Committee Exhibition Development Committee and Education and Public Programs Committee
Nostalgia and Heritage Days (PSA)	Consider ways of revamping in order to increase participation and user satisfaction	Education and Public Programs Committee
Marketing & Promotion	Consider professional opportunities for the marketing, advertising and promotion of events (PSA)  Retain professional assistance for the development and implementation of a Communications & Marketing Plan	Business Management and Resource Development Committee

Item	Recommendations	2011 Responsibility
Board policy manual	Develop a board policy manual to include the policies developed and approved in 2010, as well as a board adopted statement on ethical behavior and the avoidance of conflict of interest, a description of the duties of the board, etc.	Board
Commemorative Integrity Statement	Develop a commemorative integrity statement for the Michigan Central Locomotive Repair Shops building (including the transfer table)	Board Facilities Maintenance & Operations Committee
Exhibits (PSA)	Consider ways and means of changing existing displays and improving their appearance to add variety and increase visitor satisfaction  Seek advice on increasing and improving signage and labelling	Exhibition Development Committee
Emergency plan Accessibility plan Maintenance manuals	Develop an emergency plan, accessibility plan, maintenance manual for immovables and large moveables, a seasonal operations monitoring and remediation checklist	Board Facilities Maintenance & Operations Committee
Exhibition Plan	Develop an exhibition plan for the next three years	Exhibition Development Committee

**Strategic Planning Committee Five Year Strategic Plan**

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	Gather information on potential interactive exhibits, virtual	
Interpretive Plan	Develop an interpretive plan for the facility, including improvements to existing exhibits, and the interpretation of the building	Exhibition Development Committee and Education and Public Programs Committee
Collaboration Research	Undertake initiatives with other organizations for collaborative exhibits; continue to partner (PSA) with Port Stanley Terminal Rail and North America Railway Hall of Fame for existing programs and events and to investigate opportunities for increased cooperation and partnering (such as with the Southern Ontario Locomotive Research Society, Downtown Development Board, Elgin County Museum	Exhibition Development Committee  Education and Public Programs Committee
Collaboration Research	Undertake initiatives with other organizations for collaborative programs and special events; provide volunteer training  Undertake research on education and public programs of railway museums  Develop education programs tied to Ministry of Education curriculum	Education and Public Programs Committee
Membership	Develop a longer-range plan for membership recruitment with an emphasis on the promotion of youth involvement (also recommended by PSA)	Business Management & Resource Development Committee

Item	Recommendations	2012 Responsibility
Education programs	Offer two curriculum based education programs to St. Thomas and Elgin County elementary schools; such programs may be in cooperation with other area museum and historic sites; develop cooperative arrangements with railway telegraphers and skilled trades; similarly, PSA recommends exploring potential on and off site education programs to tie in with Ministry of Education curriculum guidelines and establish fees in the \$2-\$5 range	Education and Public Programs Committee
Facility improvements	Following replacement of the roof, develop a capital improvements plan, based on the 10 year capital forecast for other aspects of facility improvement according to the recommendations of the architectural review (plumbing and electrical	Facilities Maintenance & Operations Committee  Board

**Strategic Planning Committee Five Year Strategic Plan**

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	infrastructure etc.)	
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Item	Recommendations	2013 Responsibility
Review the effectiveness of policies and update according to need	Since a variety of policies were developed and adopted over a relatively short period of time, these will need to be assessed as to their effectiveness	Board and committees
Facility improvements	See recommendations of architect	Facilities Maintenance & Operations Committee Board

Item	Recommendations	2014 Responsibility
Evaluate effectiveness of Five Year Plan	The plan will have to be reviewed in preparation for the development of the plan for 2016- 2020	Board
Facility improvements	See recommendations of architect	Facilities Maintenance & Operations Committee Board

## Appendix 2 – Grant Application:

The following consists of major portions of the text of an application to the Ontario Ministry of Culture's Cultural Strategic Investment Fund, which was approved in 2008:

For the last 20 years the Elgin County Railway Museum (ECRM) has been a leader in the preservation and interpretation of the railway heritage of Elgin County and the city of St. Thomas. The museum has maintained the 1913 Michigan Central Railway engine house during that period of time and has assembled a large collection of over 1500 railway artifacts as well as a large archive of original documents ranging from artworks to period manuals. During this period, a number of other organizations have also developed and operate with similar mandates including building restoration (North American Railway Hall of Fame), operating a licensed short line railway for tourist excursions (Port Stanley Terminal Rail); and restoring and operating historic engines and rolling stock for use on a licensed short line railway (Southern Ontario Locomotive Restoration Society).

It now appears to be an appropriate time to chart a course for the next period of the museum's existence in partnership with the other railway heritage organizations and other interested parties in the County.

Recent studies and initiatives by the municipalities of St. Thomas and Elgin County have resulted in a challenge to the ECRM and the railway heritage community to seek ways to achieve a higher level of service to visitors and residents alike. The Premier-ranked Tourist Destinations Framework completed in 2007 for Norfolk and Elgin County placed the area's rail heritage near the top of its list of major tourism products. Likewise a number of studies related to the revitalization of St. Thomas have referenced the railway heritage theme and the resources still extant as a key element in attracting visitors and businesses to St. Thomas.

In November, 2007, a committee representing the North American Railway Hall of Fame, the Elgin County Railway Museum, and the Elgin County Museum was struck with the intention of carrying out a far-reaching assessment of the museum's future. The committee has determined that several studies are needed to achieve this objective:

### A. Facilities

An architect/engineer will be hired to carry out a needs assessment of the current museum building. The Michigan Central engine house represents, along with the Canada Southern Station, one of the few pieces of 19<sup>th</sup> century railway heritage left in Elgin and as such deserves a study of its reuse potential. One of the study's main goals will be to identify and cost of the work needed to safely and effectively house the museum based on the building programme developed by the consultant and the strategic planning committee.

The probable cost of a full retrofit of the Michigan Central engine house may be beyond the museum's (and the community's) capacity to fund; therefore, the study will also include the assessment of alternate sites and the costing of an entirely new facility.

### B. Operational Analysis

The museum has operated with minimal staff and many, many volunteers over the past 20 years. The volunteer force is now in need of strategic renewal and the needs of the museum require the development of a professional staff. The main objectives of the analysis will be to identify staff

levels needed to operate the museum on a year-round basis while meeting provincial standards in all areas based on the range of activities developed in the facility analysis. Specifically, the analysis will review collections, exhibition and programming needs and provide costed scenarios for improvements in those areas guided by the province's standards.

### **C. Public Support Analysis**

This study will determine how the organizations devoted to rail preservation can work together to achieve operational savings and improved programmes and service. The process will bring together organizations with similar and, at times, overlapping missions with the intention of creating a "who does what" guide. As well it will, through focus groups and one-to-one interviews, gauge the level of support from public and private sources for the capital requirements determined by the Facilities Assessment. Particularly, the analysis will seek to find ways of attracting greater youth participation and a volunteer base from a wider segment of the community.

The committee is aware of the opportunity that a well-designed public participation process offers to galvanize public interest and support and become the launching point for volunteer recruitment and a capital campaign. As well the study will guide new audience development. The County's economic development department has recently launched a marketing and branding study which will be of use in the marketing of the museum to new audiences. Integrating the findings and recommendations of that study and the premier-ranked tourist destination study will be part of the public support analysis.

### **Conclusion**

It is essential that the Elgin County Railway Museum develop a plan to guide the investment the museum intends to make in the community over the next few years in terms of facility renewal and increased staffing levels. The museum is committed to following a direction that will see it meet the provincial standards for museums in Ontario and take its place among the best of Canada's railway museums.

The intention of this request is to obtain support for a series of studies which will guide that investment and improve the capacity of the museum and its partners. A well-designed and clearly laid out report can be an effective means of garnering public and private support for the growth envisioned by the railway heritage community and by the County and the City in the next few years.

## **3. Results of the Project**

### **(1) Partnerships**

In the course of the studies to be undertaken all organizations in the County of Elgin both commercial and non-profit, delivering services in the railway heritage field will be consulted and opportunities for joint operations, programs and facilities will be identified. The strategic planning committee will transition into a permanent representative body in order to carry out the recommendations in the report that related to joint operations and programs.

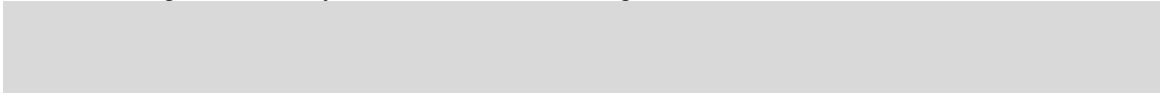
A target of two joint operations will be identified and carried out in the first year following the release of the report.

**(2) Increased Opportunities for Children and Youth**

The railway Museum now operates one of the most successful youth programmes in the county – Day out with Thomas The Tank Engine, with over 13,000 participants. A key element of the operations study will determine how this annual event can be repackaged to ensure greater long-term participation in all aspects of the museum's work by children and youth. A target of one new programme related to Thomas will be established and the response recorded.

**4. Credit to the Ministry of Culture**

All published reports will carry on the cover the phrase: "The Support of the Government of Ontario through the Ministry of Culture is acknowledged."



## Appendix 3 – Operational Assessments

### Collections, Restoration/Conservation, Storage, Research Assessment

**General Requirements:** A conformity to municipal by-laws, and provincial and federal legislation. The provincial Ministry of Culture has developed standards for community museums that have been a benchmark for providing funding. These standards can be found in the resource appendices. The collections, conservation and research standards are summarized in Appendix I of this assessment.

#### **Part A1: Rail Equipment and Support Items**

##### **General**

The artifacts in this section consist of the large pieces of rail equipment including locomotives and the supporting maintenance of way items. They are a tangible representation of the rail heritage of St. Thomas, Elgin County and Southwestern Ontario. Ministry of Culture Standards require the museum to demonstrate its stewardship and facilitate access to the collections and the information concerning its history by conserving, restoring, and regularly servicing and maintaining the artifacts in good condition. Good management requires record-keeping, historically accurate information and a well-organized and documented record of service. Legislative requirements affecting heavy equipment are derived from Transport Canada regulations.

##### *Strengths of collection are:*

- The collection is determined by criteria formed over a number of years; an inventory has been developed recently
- MCR shops are unique (the building is the largest artifact), historic and provide information not found anywhere else; locomotives and cars are housed appropriately; north portion of the building can contain longer length rolling stock
- Size of the building provides an advantage for working with heavy locomotives, restoration, repair and maintenance and are valuable to outside rail concerns
- Board of Directors maintains surveillance of the acquisition of large items and discusses the acquisition process involved, transport, location for storage, heritage value and consistency with selection criteria

##### *Collection Weaknesses are:*

- Collection of heavy equipment has not been accessioned
- Lack of documentation, research files, automated records system, consistent use of collection processing forms
- Acquisition through immediacy of need/availability rather than plan
- No adopted policies concerning the collection – collections management, collection development, conservation/restoration, research
- Disorganized storage areas
- No defined committee, volunteer and staff responsibility

**Part A2: Small Artifacts**

**General:** The artifacts in this section consist of the small pieces of equipment, memorabilia, documents and ledgers of the early administration of the railroads – items such as badges, uniforms, dinner ware, photos, plus many more. They form a tangible representation of the rail heritage of St. Thomas, Elgin County and of Southwestern Ontario. The Standards require the museum to demonstrate its stewardship and facilitate access to the collection and the information concerning its history by restoring, preserving to conservation standards, and regularly maintaining all items in good condition. Good management requires record-keeping, keeping historically accurate information and offering research services to the public.

*Collection strengths:*

- A large and interesting collection consisting of clothing, telegraphy equipment, dinnerware, lamps, office furniture and supplies, etc., that enables the museum to tell the story of regional rail history
- A computerized listing has been recently developed of the items on display
- Standards for conservation are being considered; museum staff is required to handle items with care, using gloves, controlling heat and air infiltration and lighting in the artifacts room; serious efforts have been made over the last year to gain control over the environmental hazards in the present storage/work area

*Collection weaknesses:*

- Professional guidance by trained personnel is limited
- Only a portion of the collection has been accessioned
- No adopted policies for collections management, collections development, conservation/restoration, research
- No detailed collections management procedures have been developed
- Space is limited; Items are stored off site, in rail cars, or on the upper floor of the artifacts building
- A great number of the artifacts are in paper form, at present without appropriate protective systems
- A number of items which are likely to deteriorate as a result of humidity fluctuations
- The computerized inventory is primarily a listing rather than an information retrieval device; it is necessary to standardize the system; to provide research capability, it should have subject and cross-referencing terminology to assist in 'search and find' operations of the researcher
- The ECRM Board of Directors receives reports of items to be accessioned but does not exercise professional surveillance
- Acquisition priority is usually determined by the immediacy of an item and the offerings of individuals

**Part B: Conservation/Restoration**

*Strengths:*

- Retired rail personnel with expertise in the history of rail are involved in the restoration activities
- Maintenance and preservation guidelines are found in technical manuals and also in engineering and technical literature

*Weaknesses:*

- The age of volunteers with expertise will limit a continuity of knowledge unless younger volunteers are recruited
- A decision making process needs to be defined as to the functionality of equipment to be used outside the building
- Lack of a facility for reproducing parts

**Part C: Storage**

It is expected that the facilities study will address the storage of equipment. Each item however that is acquired must be well documented as to its history, pertinence to the mission and measured for sustainable maintenance.

*Strengths:*

- The main part of the building provides space for the storage of large pieces of equipment
- Some storage is available in railway cars and the attic of the artifacts building

*Weaknesses:*

- Limited storage for small items; exhibits of duplicates of items serves as open storage without contributing meaning to exhibits
- No adequate environmental controls in the main part of the building due to lack of heat and large number of broken windows
- Storage of materials is not connected to the collections management system, making artifact retrieval problematic

**Steps for Improved Collections Management, Conservation, Storage and Research**

1. Revise the collections management policy
2. Draft a collections development policy
3. Draft conservation/restoration and research policies
4. Assign committee responsibilities and develop terms of reference
5. Develop collections management procedures
6. Designate an area for items offered for donation
7. Develop loans procedures
8. Hire a staff person and/or assign a volunteer to assume responsibility for collections management and provide training for volunteers and summer staff; accept offers for training from other organizations such as the Elgin County Museum
9. Establish collections management work area
10. Formalize collections storage areas and improve them with shelving

11. Initiate computerized collections management practices: skeletal inventory, accession register, assess status of collections records and forms, make use of County of Elgin data base
12. Develop forms – temporary receipt, loans, etc. as required
13. Establish conservation treatment priorities
14. Undertake a deaccessioning exercise

**Key from the Ministry of Culture Standards for Community Museums:**

*Collections:*

- proper care and documentation, written collection development policy (this policy ensures that the scope of the collection is consistent with the statement of purpose, sets priorities for collection development)
- commitment to ethical behavior
- written collections management policy (procedures and documentation for acquisition, use and deaccessioning, procedures and documentation for incoming and outgoing loans, procedures for the management of collections records, commitment to conservation standards in the labeling, care and handling of artifacts, distinction between permanent collection and education collection, meeting relevant municipal, provincial and federal legislative requirements)
- assignment of registrar duties to a trained staff person with adequate time, workspace and funding for collections management activities
- use of a collection documentation system with a standardized numbering system – accession register, master catalogue file and signed donor and loan forms, off-site copies of collections records, up-to-date collections records

*Conservation:*

- written conservation policy (demonstrating distinction between preventive care and conservation treatment, commitment to preventive care, priorities for making decisions on conservation treatment)
- assigning responsibility to appropriately trained staff
- commitment to consult with qualified experts in conservation
- commitment to ethical behavior in care of collections
- commitment to protecting the collection through proper care
- delineation of separate collections storage
- Commitment to safety and preservation of artifacts on display, security measures, maintaining environmental standards, professional standards for conservation measures

*Research:*

- Recognition as an ongoing activity
- a written research policy demonstrating a commitment to research
- scope of research is consistent with statement of purpose
- a need for establishing priorities for research
- a commitment to accuracy, objectivity and ethical behaviour
- budget allocation
- dedicated space for internal and external research
- training in the handling of research materials

## Exhibition Assessment

**Key from the standards:** written policy, budget allocation, research, defined preparation space, schedule for a mix of changing and permanent exhibitions consistent with statement of purpose, trained staff, commitment to accuracy, objectivity, and ethical behavior, adherence to conservation standards and municipal, provincial and federal legislation, community relevance, connections and resources, accessibility, techniques for assuring effective communication and evaluation

### **General:**

At present there is no committee structure (one is proposed – Exhibition Development Committee) for the planning and preparation of exhibits, no budget and no written policy. The rationale for the present spaces gives the impression of being of service to members and not the general public. A changing exhibition plan provides an opportunity to bring different interest groups into the museum who might not otherwise visit. It provides the perception of change, provides the opportunity for researching new topics and opportunities for community consultation and involvement in new areas of exhibition development. A change in exhibits and renewal of permanent exhibits demonstrates relevance to funders, levels of government and area school boards.

### **Model layout**

Strengths: of great interest to visitors; serves as a general orientation to Michigan Central rail connections to Elgin County communities; has the potential to provide historical context for pieces in the collection; it is an accurate and detailed representation of actual railway settings in St. Thomas and Elgin County  
Weaknesses: needs refurbishment; no written interpretation; not easily accessed with regard to traffic flow

### **Exhibition space**

Strengths: variety of materials available to the public in abundance, accessible  
Weakness: current exhibit is a solution for the storage problem; doesn't change; layout and arrangement is chaotic and congested; no story line; no overview of the rail history of the city or county is provided; the building is not interpreted; the space itself is not suitable for exhibition – no buffer from outdoors; the space also functions as an office, a workshop, a meeting space, and gift shop; the wall of names occupies prime exhibit space

### **Main building and rolling stock:**

Strengths: largely intact engine shop, several key pieces of rolling stock  
Weaknesses: little building interpretation (MCR Repair Shops building); restoration program not actively interpreted; rolling stock rarely accessible and carries limited interpretation

### **Station Master's office and smaller exhibits:**

Strengths: well furnished office; interesting assortment of artifacts  
Weaknesses: no time period has been established for the office and it is not easily accessed; pieces are moved to accommodate shows; no interpretation or context is provided beyond limited identification

### **Steps for Exhibition Program Development:**

1. Establish an exhibition committee
2. Draft a written exhibition policy
3. Draft a budget
4. Establish an annual exhibition plan for the next three years
5. Determine what improvements are needed to the present exhibition space
6. Place the results of past exhibitions on the museum's web site
7. Develop initiatives with other organizations for collaborative exhibitions
8. Develop initiatives with other organizations for off-site storage
9. Develop/record a tour script in a written format (partially complete but needs updating)

## Education & Interpretation

Key from the standards: written policy, budget allocation, selection of researched programs (school, public and special events) consistent with statement of purpose and promoting learning and enjoyment, prioritization for program development and designation to trained staff, commitment to accuracy, objectivity, and ethical behaviour, adherence to conservation standards and municipal, provincial and federal legislation, education space, community relevance, connections and resources, education collection for hands-on use, accessibility, techniques for evaluation

“Interpretation and education programs provide an opportunity for the community to interact more closely with the museum's collections and information. They also complement other sources of learning in the community, both formal and informal. Through its education programs, the museum reaches audiences of all ages, interests and abilities, and serves as a resource for its communities.”

### General

At present, a committee structure exists for such special events as Day Out with Thomas and Railway Heritage Day. There are no formal education programs offered to schools; facility tours only are offered to classes and groups. The public can view restoration work underway on various freight and passenger cars, as part of a “working museum” approach.

A selection of Ministry of Education curriculum related education programs brings revenues to the organization, makes it relevant to youth (and adults from what is heard by parents), supplements the formal education system, develops research on the rail history of the community and demonstrates relevance to funders, levels of government and Boards of Education.

A variety of public programs and special events can bring new audiences to the museum, develop the membership base, institute change and facilitate the perception of change, and develop a breadth of community contacts.

### Steps for Education Program Development

1. Form an Education & Public Programs committee
2. Investigate programming offered by like rail history focused institutions
3. If funds permit, hire a part-time education staff person or incorporate this work within the purview of another staff member with more general responsibilities; develop a budget for education programming
4. Education & Public Programs committee and staff to study curriculum for the development of grade specific programs (develop one program based on collections strength; work with like groups in Elgin County such as Elgin County Museum and North America Railway Hall of Fame)
5. Establish a time frame for program development

6. Consider developing a summer camp in conjunction with the Hall of Fame and with the assistance of summer students
7. Develop a training program for volunteers
8. Select artifacts suitable for hand-on programs
9. Establish a space where programs are to be offered
10. Tie in education program to exhibition program
11. Develop an education program brochure for firstly, St. Thomas schools, secondly, for Elgin County schools; one education program to be offered in 2010
12. Develop a public program and special event brochure for 2010
13. Collaborate with current proposals for education programming (“Canada Southern Railway Station: Active in Peace & War” for connections to MCR Shops building; “Jumbo” for interpretation of general rail history in St. Thomas to the grade 3 level) and with upcoming projects (“Station Neighbourhood” and “Seeing us in the past, seeing the past in us”).
14. Develop an interpretive plan in conjunction with exhibition schedule
15. Actively participate in the Elgin/Oxford/Norfolk Museum Network to assist in the planning of cooperative education programming

#### **Steps for Public Programming, including Special Event Development**

1. Assess/evaluate existing cycle of public programs through existing structure by the use of a performance measures template and reading the CD “Evaluating and Achieving Through Performance Measures”
2. Establish (is such does not already exist), a list of public programs for 2009/10
3. Document and transcribe existing guided tour

## **Facility / Site**

### **Assessment for ECRM Strategic Plan**

**Mission:** “To preserve, teach and display to the public the rich heritage of the railroads and their role in the development of St. Thomas and Elgin County, through the operation of a museum that meets Ministry of Culture standards (approved December 6, 2008)”.

**General Requirements:** A conformity to municipal by-laws, and provincial and federal legislation, especially as they apply to safety. The provincial Ministry of Culture has developed standards for community museums that have been a benchmark for providing funding. These standards can be found in the resource appendices.

Restoration workshops are a key component of railway museums and the restoration or rail equipment requires heavy machinery of many different types. The equipment is capital intensive, requires special training and the development of special procedures for its use to ensure protection of staff, volunteers, the collection and the environment. As noted above, a knowledge of relevant regulatory areas is essential: national and local safety regulations, Workers’ Compensation, liability insurance requirements, hazardous materials handling and use (including materials safety data sheets), signaling, storage and disposal needs of waste and hazardous materials. In addition to training in conservation procedures, staff members must also receive training in safety awareness and promotion, environmental issues, and emergency procedures including CPR and first aid.

Track signaling, communications and power distribution systems need to be constructed and maintained to safe and suitable standards. Standards thereto should consider physical characteristics of rail equipment, speed and frequency of operations, local weather conditions and availability of adequate staff and financial resources to provide ongoing maintenance and rehabilitation. Consideration is given to

period appearance. Regional variations, specific site history and historical and interpretive relationships between equipment and systems play roles in determining appearance and maintenance standards of track, overhead and technological support systems.

Security levels need to consider size of objects and scope of collections, the surrounding locale, buffers to other kinds of development. Protection from fire, flood, vandalism, illegal dumping, use of recreational vehicles, emergency preparedness planning and potential disruptive activities to neighbours are important considerations.

Physical and intellectual accessibility to buildings and programs need to be considered through policy and practice.

**Key from the Physical Plant Standard:** a safe and functional environment for visitors, staff, the collection and related activities, balanced with a need to preserve the integrity of heritage buildings.

- Design and layout to accommodate the physical needs of users, staff, collections and activities appropriate to the statement of purpose and to the community role and image
- Meeting environmental norms appropriate to functions
- Ensuring security through the identification of potential threats
- Developing written procedures responding to threats, emergencies and disasters
- Training staff to implement emergency and disaster response procedures
- Establishing a system of periodic testing and assessment of the effectiveness of emergency procedures
- Ensuring that preventive or security systems are assessed for their potential impact on collections and the museum's character and functions
- Having a written maintenance manual that sets out the pattern of inspection and maintenance of buildings and grounds, sets priorities and schedules for ongoing repairs and capital upgrades, ensures that health and safety codes are met in the maintenance and repair of the physical plant, conducts daily, weekly and monthly housekeeping routines
- Environmental responsibility in the use of energy and materials, including the handling, storage and disposal of materials
- Maintains the historical integrity of heritage structures in their use, maintenance, repair and modification, following conservation standards and procedures
- For seasonal operations, ensuring that environmental conditions are monitored for temperature and humidity, taking measures to decrease the risk of environmental damage during the off-season

#### **Facility Strengths**

- Significant heritage building in the 1913 Michigan Central Locomotive Repair Shops
- Heritage features such as the transfer table, service pits, urinals and fire hydrants
- Existence of large interior cranes and portable cranes

#### **Facility Weaknesses**

- Deteriorating building requiring major capital investment: roof and window repairs, HVAC systems, mechanical upgrades (electrical, security, fire, etc.)
- Uncertain future to track connections to Port Stanley, London and beyond
- Lack of plans concerning connections with adjacent facilities such as BX Tower, Canada Southern Station
- Lack of security fencing around collections stored outside the main building
- No defined education area for use by visiting classes or community groups
- Lack of food service area for volunteers and visiting public
- Lack of motive power for transfer table

- Lack of unloading dock for rail to highway truck unloading
- Lack of facility for making some types of spare parts
- Lack of planning for meeting future needs of Transport Canada

#### **Steps for Facility Development**

1. Design a longer-term floor plan specifying exhibit, interpretation, collections storage, conservation/restoration, administration, collections holding, cataloguing, visitor reception areas, etc.
2. Develop a shorter-term plan specific to collections cataloguing and storage
3. Develop a commemorative integrity statement for the MCR Locomotive Repair Shops building, including the transfer table
4. Develop a ten year capital forecast
5. Develop an operations plan for use of available trackage for special events, rail connections beyond the immediate property
6. Develop an emergency plan
7. Develop an accessibility plan
8. Develop a maintenance manual for immovables: buildings, track, transfer table
9. Develop a maintenance manual for large moveables: locomotives, passenger and freight cars
10. Develop a seasonal operations checklist for environmental monitoring and remediation

## **Governance Assessment**

**Key from the standards:** Written documents concerning authority for the museum, statement of purpose and objectives, provisions for dissolution, board policy manual to include the staffing needs, conflict of interest and ethical guidelines, the process for meeting municipal, provincial and federal legislative requirements, a volunteer policy, a human resources policy, planning for short and longer- term needs, and partnership opportunities

#### **General**

The museum is an incorporated non-profit charity as established by Canadian law and guidelines. Its documents include letters patent and bylaws that state the museum's purpose and objectives and include provisions for the dissolution of the museum's assets and liabilities should it cease to operate. These documents also include the composition and structure of its board, including selection of members and terms of office. A number of written policies have been developed, including a financial reporting system with annual review by an accountant. An annual budget is presented at the annual general meeting. Other written policies include collections, deaccessioning, rental agreements, staffing for events, staff supervision and time sheets. The museum board meets monthly and follows a written agenda with minutes kept of all discussions and decisions. A 5 year strategic plan is being developed. A governance committee has been formed and is meeting regularly.

In general terms, the governing authority protects and enhances the organization's collections and programs, and monitors its physical, human and financial resources. Governing authority members: must be aware of their fiduciary, legal and ethical responsibilities as trustees of collections held in the public trust; ensure that all those who work for or on behalf of the museum understand and support the mission and public trust responsibilities; understand and fulfill trusteeship duties, acting corporately rather than as individuals; ensure that a formal mechanism exists to disseminate standards and expectation regarding working relationships among trustees, employees, and volunteers, based on equity and mutual respect; be aware of applicable provisions of non-profit law, tax and accounting regulations and related legal and fiscal concerns including institutional and individual liability and exposure.

### **Strengths**

- Letters patent with incorporation as a registered non-profit with charitable status (Ontario corporation number 817283 dated February 8, 1989)
- Revised by-laws approved in June, 2008 better defining the membership requirements and organization
- Good functioning executive committee
- Good volunteer structure for Day Out with Thomas event, good publicity and community involvement; DOWT represents an excellent revenue generating event
- Good financial reporting system that meets financial review requirements of accounting
- Fulfills the original mandate to use volunteers skilled in steam and diesel technology to acquire and restore locomotives, coaches and freight cars and to house and record donations as they were received from members of the community
- Summer staff are hired and supervised by volunteers

### **Weaknesses**

- Because of the uncertainty of the building's ownership and accessibility, the organization has little motivation to improve its governance structure
- No overall curator or executive director so that governance is exclusively through volunteers with little museum expertise or training
- Few written policies on exhibits, programming, education or conservation consistent with museum standards; artifact cataloguing is a limited information retrieval system and needs to be integrated with the network of Elgin County museums
- A lack of timelines for building acquisition means missed opportunities
- Skills in locomotive restoration, steam and diesel technology as listed in the original mandate are not being passed on to a younger generation; little interest in education programming among members
- No orientation procedure or training for new members or directors
- No fundraising structure to broaden financial base from just the DOWT event
- No ongoing or consistent volunteer coordination system

### **Steps for Governance Development**

11. Create a board policy manual to include policies on obligation to ethical behaviour and the avoidance of conflict of interest, the duties of the board as a whole as well as individual board members, ensuring that the museum's operation and administration meet municipal, provincial and federal legislative requirements, and new policies to supplement those regarding the recruiting, supervising and evaluating of staff
12. Address issues identified by "Recommended Practices for Railway Museums" (p. 5, for example, understanding the implications of holding different and potentially conflicting roles, insular thinking, nominations for the governing authority regarding diversity of qualifications such as objectivity, business and management background, leadership abilities, etc.)
13. Continue work on committee structure, membership and recruitment, including orientation.
14. Create a human resources policy
15. Create a funding initiative to expand on those in place.
16. Create a volunteer policy.
17. Create a community policy.
18. Create a professional development policy.
19. Create a copyright observance policy.
20. Create a facilities rental policy.

21. Create a fees and charges list.
22. Create a purchasing policy.
23. Hire at least two permanent staff with appropriate job descriptions and goals that will advance the organization
24. Assign dedicated office space for administrative functions
25. Develop an org chart
26. Develop a long range plan for the future of the membership

## Assessment for ECRM Strategic Plan – Finance & Fund Development

**Mission:** “To preserve, teach and display to the public the rich heritage of the railroads and their role in the development of St. Thomas and Elgin County, through the operation of a museum that meets Ministry of Culture standards (approved December 6, 2008)”.

**Vision:** to establish a fund development program that would secure funds in support of the mission statement.

**Key from the Standards:** demonstration that the museum is a fiscally responsible public institution – the governing body follows policies and procedures to achieve this goal through securing the funding necessary for the maintenance of operations and capital projects, demonstrating a commitment to ethical behaviour in the pursuit of funding, seeking diverse sources of funding both public and private, approving an annual budget, making public an annual financial statement

**General:** Railway museum funding should be understood in terms of a variety of sources, both short and longer term that meet a variety of needs, capital and non capital. Additional funds need to be raised to supplement proceeds from admissions and memberships.

- Traditional sources include membership fees, admission fees and gift shop revenues, but these are insufficient to cover operating and capital costs
- Donors may direct priorities to reflect personal goals but the museum must ultimately set institutional priorities; endowments may be established to meet these priorities
- Funding priorities can include collections conservation and acquisition, exhibition development, education programming
- Fund development strategies can involve partnerships with educational, commercial and other communities; such strategies may include annual giving, institutional membership and planned giving
- Commercial and fundraising uses of the museum must not compromise the mission

**Strengths:**

- A very successful Day Out With Thomas fund raising event
- The recession is making infrastructure funds available for projects that are in a state of readiness
- An opportunity to purchase the Locomotive Repair Shops building is imminent

**Weaknesses:**

- A small and aging volunteer force for fund development

- A building which is not owned by the organization, which requires considerable capital improvements
- Recession
- Goals not clearly established
- Competition with other campaigns, including the CSR station restoration and confusion over the difference with that project
- Other liabilities associated with building and property ownership

**Steps for Fund Development:**

1. Establish a Business Management & Resource Development Committee with terms of reference, such terms to include the treasurer as a member
2. Draft a finance policy
3. Draft a sponsorship policy
4. Draft a museum shop policy
5. Develop a plan for applying for provincial and federal granting programs, such programs to include Job Creation Partnerships, Heritage Organization Development, Brownfield Development as a component of Rural Economic Development, the Trillium Foundation, Cultural Spaces Canada
6. Expand the rental program
7. Expand the public programs season and include education programming as a revenue source
8. Establish a capital campaign through the model of "adoption" of building elements
9. Establish a program of special fund raising events such as raffles, dinner/dance, etc.
10. Expand on partnerships with other organizations
11. Track the results of fund raising efforts

## Appendix 4 – Partial Inventory of Rolling Stock

### Inventory

The following is an inventory of equipment which has been acquired and is housed in the museum. The category of this collection is large equipment used to operate railways. Some of the collection is acquired in order to maintain an interpretation of this era of rail history: steam engines, diesel locomotives, cabooses, troop cars, passenger cars, etc. Early diesels are now being discarded by railways as well, providing opportunities for acquisition.

There is the start of a cross section of rail cars that operated in St.Thomas and area and southern Ontario.

### **Inventory to Date:**

- Locomotives 3 diesel, 1 steam, 1 electric freight motor
- Baggage car 1
- Passenger cars 1
- Troop car 2
- Jordan spreader
- Cabooses 3
- Gondola cars 1
- Flat cars 1
- Box cars 5
- Electric wheel crane 1
- Incline Railway cars 2
- Track inspection cars and trailers 6
- L&PS Interurban coach 1

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## Summary of Recommendations

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- *Revise required policies and draft new policies for Board adoption to conform to Ministry of Culture requirements*
- *Develop appropriate spaces for collections work and storage*
- *Designate staff and committee responsibilities for collections management*
- *Deaccession surplus materials and conversely, develop collection development priorities*
- *Draft an exhibition policy and establish committee responsibility*
- *Establish a 3 year exhibition plan*

- *Develop collaborative exhibitions with other organizations*
- *Create a board policy manual, such to include a commitment to ethical behaviour*
- *Policies should comply with the requirements of the Ontario Ministry of Culture Standards for Community Museums and Recommended Practices for Railway Museums*
- *Develop fund related policies: finance, sponsorship, gift shop, purchasing and establish committee responsibility*
- *Develop a strategy for obtaining project and capital funding from federal and provincial sources*
- *Develop a five year capital budget*
- *Develop a revenue generating strategy*

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## **Required Resources**

- Collections Management Policy draft
- Collections Development Policy draft
- Conservation Policy draft
- Research Policy draft
- Exhibition Policy draft
- Education & Interpretation Policy draft
- Communications Policy
- Education programming draft brochures

<sup>i</sup> The existing building size is approximately 58,000 sq. ft.

Main building - +/- 52,000 sq. ft.  
Artifacts bldg - +/- 3,925 sq. ft.  
Model room - +/- 2,475 sq. ft.

Total Existing Area +/- 58,400 sq. ft.

The entry addition proposed by the architect is approximately 3,000 sq. ft. for a total proposed area of 61,400 sq. ft. – give or take a few feet.

<sup>ii</sup> Laurence Grant was loaned to the planning process by the North America Railway Hall of Fame and as of February 2009 became a part-time staff member in order to facilitate the deliberations and products of the Committee.

<sup>iii</sup> American Association of Museums and Association of Railway Museums