



# National Capital Trolley Museum 2013 Strategic Business Plan

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## **Introduction**

The Trustees and members of the National Capital Trolley Museum (the Museum) are pleased to present the 2013 Strategic Business Plan.

Development of the initial NCTM Strategic Business Plan in 2001 was made possible by generous contributions of time and energy by Trustees, Museum staff, and volunteers, and with valuable financial and institutional assistance from the Arts and Humanities Council of Montgomery County (AHCMC).

The Museum's strategic planning process has identified the underlying principles and values of the Museum, which are the basis for sound decisions on strategies and action plans. Long-term business strategies and action plans, in turn, are the foundation for astute day-to-day and month-to-month decision-making that actually brings the strategic milestones into reality.

The Museum recognizes that even the perfect strategic plan is only a starting point. The Museum intends to follow through with ongoing investments of energy, focus, and resources to create the long-term results that this Strategic Business Plan has identified. In doing this, the Museum anticipates that some of the action plans identified in this report may be refined, expanded, and improved upon over time as conditions change and as important strategic milestones are achieved.

To everyone who has supported the Museum in this strategic planning effort, we say THANK YOU, and look forward to your continuing support.

## Executive Summary

The Museum's 2001 Strategic Business Plan (SBP) was developed in a participative planning process facilitated by Acuity, LLC, consultants, during March and April 2001. The participants were Trustees, staff, and volunteers, who met in four planning sessions aligned with the four main categories of the U.S Small Business Administration (SBA) business planning model: 1) Description of the Business, 2) Financial Plan, 3) Marketing Plan, and 4) Operations/Implementation Plan. The 2013 SBP presents an update review and directions based on the initial SBP.

The Museum has completed the construction of new facilities (\$7.35 million) in Northwest Branch Park of the Maryland-National Capital Park and Planning Commission as anticipated in the 2007 SBP. Utilizing these facilities, the Museum is implementing conservation and restoration plans for street cars in the collections and creating effective programs to serve the public.

The Museum has identified a number of important long-term goals. These include: being recognized for excellence in the museum community, being a visible and valued institution in the local area, being both inviting and accessible to visitors, steadily increasing membership and ridership, being financially sound, remaining family-oriented, being a research resource, and providing Maryland residents with an enhanced sense of place and history.

To meet these long-term goals, the Museum has established short and medium range goals, with milestones, for each of the nine Recommended Practice areas established by the Association of Tourist Railroads and Railway Museums. Those practice areas are: 1) Institutional Purposes, 2) Governance, 3) Staff Structure and Evolution, 4) Programs and Support Activities, 5) Collections Stewardship, 6) Museum Facilities and Infrastructure, 7) Funding, 8) Accessibility, and 9) Corporate Relations (including marketing).

Regarding Institutional Purposes, the 2001 strategy group examined trends in the economic and community environment. The Museum also identified its core principles, i.e., the "non-negotiables" that make the Museum what it is. As a preparatory step, most Trustees, staff, and volunteer participants completed a questionnaire regarding NCTM strengths, weaknesses, opportunities, and concerns. The results revealed five themes, which were discussed by the entire group. These themes appear on page 7.

Regarding Governance, the Museum underwent step one of the 3-part American Association of Museums Museum Assessment Program (MAP I) in the fall of 2000. The assessment surveyor recommended establishment of additional positions on the Board of Trustees and revisions to the Bylaws. These recommendations have been implemented.

Regarding Staff Structure and Evolution, the Museum plans a more formalized volunteer program and additional paid staff time to oversee the volunteer program. The Museum also seeks to fund the costs of a part-time director of marketing to support new Corporate Relations objectives. The Trustees are also developing staff for succession.

Under Programs and Support Activities, the Museum plans to improve the docent program, sponsor special events and off-site exhibits, recognize changing demographics and technology in new interpretive exhibits, and actively experiment with ways to enhance the museum experience.

Regarding Collections Stewardship, the Museum has a Collections Policy, which it has now augmented with four strategies to register and publicize the collection, two strategies to enhance the Maintenance Program, and three strategies to build the Restoration Program.

In the area of Museum Facilities and Infrastructure, the Museum recognizes the need to establish funding resources to maintain its new campus and to complete the planned Plaza.

In the area of Funding, other than funding additional staff, the primary strategic priority is to obtain full funding for conservation/restoration projects and continue to support planned giving as a way to support the Museum for the future.

Regarding Accessibility, the Museum plans to offer expanded hours and programs, improved signage, and at least one handicapped accessible street car.

Regarding Corporate Relations, the Museum expects to establish institutional and community partnerships and to expand marketing and promotion of the Museum.

Before the next update of the SBP, the Museum anticipates completing the *Standards and Excellence Program for History Organizations (StEPs)* a voluntary assessment program for small- and mid-sized history organizations sponsored by the American Association for State and Local History (AASLH).

In 1997, the Association of Railway Museums (ARM) (now Association of Tourist Railroads and Railway Museums) issued the publication, *Recommended Practices for Railway Museums* in cooperation with the American Association of Museums (now American Alliance of Museums). In it, the ARM identified nine categories of recommended practices which are the categories followed in this 2013 Strategic Business Plan:

1. Institutional Purposes
2. Governance
3. Staff Structure and Evolution
4. Programs and Support Activities
5. Collections Stewardship
6. Museum Facilities and Infrastructure
7. Funding
8. Accessibility
9. Corporate Relations

## **Strategic Goals**

### **LONG-TERM GOALS (5 TO 20 YEARS)**

- To be a notable public attraction in the National Capital region
- To be an important historical and educational resource regarding the role of electric transit in community development
- To provide positive experiences, information, and nostalgia for visitors
- To enhance accessibility to facilities, programs, collections
- To be visible and valued in the community
- To have steadily increasing membership and ridership
- To have recognized high standing in the museum community
- To address changing demographics and technology
- To be financially sound

### **MEDIUM-TERM GOALS (3 TO 5 YEARS)**

See discussion and tasks in each of the Recommended Practice areas which follow.

### **ONGOING**

See discussion and tasks in each of the Recommended Practice areas which follow.

## **1) Institutional Purposes**

This category includes public interests, mission statements, and periodic re-assessment.

### **MISSION STATEMENT**

The National Capital Trolley Museum preserves and interprets the heritage of electric and interurban railways of Washington, DC and environs for the benefit of present and future generations, while supplementing its collections with significant national and international objects to enhance its interpretive programs.

To fulfill this mission, the Museum shall:

- Acquire and manage collections of objects related to the history of electric street railways;
- Administer real and personal property;
- Operate an electric railway for interpretive purposes, and;
- Publish histories of electric street railways.

### **CORE PRINCIPLES**

Because decisions must be made in an ever-changing environment, it is important for the Museum to be clear about the core principles and values that guide it. The following are the central factors in the identity of the Museum that make this museum what it is, and what it is not.

- Holding historic assets as a public trust
- Focusing on the electric railway heritage of the National Capital region
- Preserving and interpreting objects related to the history of electric street railways
- Facilitating rationalization of Museum collections so objects are located in the museum most relevant to their provenance
- Being open to the public
- Being dedicated to teaching and learning
- Enabling research
- Operating street cars on the Museum's demonstration railway
- Providing hands-on experiences
- Maintaining a volunteer component
- Providing an affordable, educational, and enjoyable visitor experience

## **ORGANIZATIONAL CONSTANTS**

Every organization has circumstances that constitute "givens" in the short run, and possibly the long run as well. The planning group identified the following issues with those apparent characteristics:

- Educating children is intrinsic to the Museum's reputation.
- The Museum serves a relatively transient area which has a weak sense of local history.
- Funds for Museum operations derive substantially from the public.
- Running an operating trolley requires the availability and maintenance of extensive, specialized facilities.
- Two generations have not known electric street railways as part of the urban and suburban landscape.

## **ORGANIZATIONAL ASSESSMENT**

Working from participant-completed questionnaires concerning the strengths, weaknesses, opportunities, and concerns regarding the Museum, these five primary themes emerged from the questionnaires which the group discussed.

- Sense of pride in and dedication to the Museum and its programs
- Desire for fewer constraints on resources available to the Museum
- Agreement that the staffing and volunteer structures are too thin
- Desire for stronger community relations and outreach
- Desire for increased ability to maintain and enhance the facilities and collections

## **STAKEHOLDERS**

The Museum recognizes that there are organizations and communities which have an interest in the Museum's success.

- Arts and Humanities Council of Montgomery County
- Conference and Visitors Bureau of Montgomery County
- Heritage Tourism Alliance of Montgomery County
- Maryland-National Capital Park and Planning Commission
- Montgomery County Public Schools
- And, railfans, urbanists, historical societies, general visitors

## 2) Governance

This category includes governing authority's responsibilities, selection processes and criteria.

### **STRATEGIES FOR ENHANCED GOVERNANCE**

The Board of Trustees has acted upon the surveyor's recommendations contained in the Museum Assessment Program report dated September 22, 2000.

The Board of Trustees anticipates completing the *Standards and Excellence Program for History Organizations (StEPs)* created by the American Association for State and Local History. Encouraging awareness and achievement of national standards, *StEPs* provides a self-paced, self-study program of assessment questions and performance indicators (Basic, Good, Better) to rate policies and practices in six standards sections. The Board of Trustees may then clearly identify Museum strengths and areas needing improvement before updating 2013 SBP in 2019.



### **3) Staff Structure and Evolution**

This category covers training, professional development, personnel practices and criteria.

#### **STRATEGIES TO ENHANCE STAFFING**

##### **Task 1: Enhance and Maintain a Formalized Volunteer Program**

Time: Ongoing.

Talent: Volunteer Coordinator  
Operations staff  
Trustees

Milestones: A statement of volunteer philosophy is adopted.  
A brochure of volunteer opportunities is available.  
Volunteer opportunities are published on the Museum website.  
Prioritized lists of volunteer tasks are maintained in all areas.  
Volunteers are individually interviewed and matched to assignments.  
Volunteers are well trained and prepared to succeed retiring staff.  
Maintenance volunteers move up from unskilled to skilled work.  
Museum staff actively recruit additional volunteers.  
Sponsorships are provided for trolley uniforms.  
Contributions of volunteers are publicly recognized.  
Volunteer activities are highlighted in the newsletter.  
Social events and privileges are provided for volunteers.

**Task 2: Establish a Paid Volunteer Coordinator Position**

Time: Medium Term

Talent: Trustees and Executive Director

Success milestones: Funding is provided for a paid, part-time Volunteer Coordinator  
A formal job description or contract clearly explains expectations.  
A suitable pay and benefits package is provided.

**Task 3: Establish a Paid Marketing Director Position**

Time: Medium Term

Talent: Trustees and Executive Director

Success milestones: Funding is provided for a paid, part-time Marketing Director.  
A formal job description or contract clearly explains expectations.  
A suitable pay and benefits package is provided.

#### **4) Programs and Support Activities**

This category includes development of interpretive goals: basic activities, educational programming, well-being of visitors, re-creation of authentic railway experiences, railway operations, visitor feedback, operational training, and safety.

##### **STRATEGIES TO INCREASE VALUE OF MUSEUM PROGRAMMING**

###### **Task 1: Enhance the Docent Program**

Time: Ongoing

Talent: Operations staff  
Trained volunteers

Success milestones: Talks by car operators are structured, informative, and interesting.  
Docents customize their talks to the interest of the audiences.  
Docents offer consistent, standard talks and commentary.  
Members and staff share personal experiences about trolleys and relate the return of street cars to modern community development.

###### **Task 2: Sponsor Special Events and Off-Site Exhibits**

Time: Ongoing

Talent: Operations staff  
Marketing director

Success milestones: Mobile exhibits are shown at conferences, malls, and tradeshows.  
Picnic and theme events are held, e.g. Canada Day.  
Businesses and community groups partner with the Museum for joint events.

### **Task 3: Enhance Interpretive Exhibits and Materials**

Time: Ongoing to Medium Term

Talent: Operations staff  
Director of Education  
Volunteer coordinator  
Marketing director

Success milestones: A video is offered appropriate for young audiences.  
Exhibits explain the importance of electric street railways in the growth of cities and in revitalizing modern urban areas.  
The Museum maintains reciprocity of collections with other museums.  
Contemporary technology and materials are used to increase relevance of trolley history.

### **Task 4: Enhance The Visitor's Museum Experience**

Time: Ongoing

Talent: Operations staff  
Director of Education  
Volunteer coordinator  
Marketing director

Success measures: A marketing study is done to determine who comes and why.  
The Museum has a formalized marketing plan.  
Feedback is regularly obtained from visitors and used to make improvements.  
Varied lectures and programs about electric street railways are offered.

## **5) Collections Stewardship**

This category includes the development of collections management policies (categories of collections, use versus preservation, collections staff roles and responsibilities, acquisition, accessioning and de-accessioning, loans, ethics, and regulations); the establishment of preservation and conservation practices (categories of objects, use decisions, maintenance); and the management of spare parts.

### **COLLECTIONS POLICY**

The Museum collections should follow the Mission Statement. To completely achieve such a goal, the size of the collections would have to be far larger than the Museum is able to support. Collections must be conserved or preserved; and these efforts require considerable capital expenditures for facilities, manpower, and materials. These limitations necessitate controlling the growth of collections while simultaneously maximizing the possibility of achieving effective interpretation. To accomplish this dual mandate, four (4) criteria are employed in the collections development recommendations:

- Using Washington, DC streetcars whenever possible to trace the technological development of electric street railways enhances the regional nature of a small streetcar collection;
- Building the International Collection reflects the unique role of Washington, DC as an international city;
- Accommodating interests of members beyond the mission for the media collections; and,
- Permitting the curatorial staff to select representative samples of electric street railway objects provides flexibility for interpretive work.

## **STRATEGIES TO REGISTER THE COLLECTIONS**

### **Task 1: Organize the Library**

Time: Ongoing

Talent: Supervisor to recruit and train volunteers  
Qualified or trainable volunteers

Success milestones: Volunteers are trained on PastPerfect software.  
PastPerfect is available to the membership and staff.  
A practical lending system is in place.

### **Task 2: Identify the locations of all collections items**

Time: Ongoing

Talent: Supervisor to train volunteers and oversee work  
Volunteers to record items

Success milestones: Supervisor and volunteers are trained on PastPerfect software.  
All areas of the property have been fully inspected.  
All inspection results are recorded.

### **Task 3: Co-locate like items and catalog them**

Time: Medium Term

Talent: Supervisor to train volunteers and oversee work  
Volunteers to record items

Success milestones: All items are identified, labeled, and protected.  
All items are fully catalogued in PastPerfect.  
A rotating exhibit capacity is developed.

### **Task 4: Publicize the Collection**

Time: Medium Term

Talent: Supervisor to oversee the effort  
Computer-literate volunteers

Success milestones: A searchable database is provided on the Museum's website.  
The website is used to solicit help in identifying objects and  
donations of objects for the collections.

## **STRATEGIES TO ENHANCE THE MAINTENANCE PROGRAM**

### **Task 1: Assure Timely Repairs of All Cars in Operation**

Time: Ongoing

Talent: Operations staff  
Qualified car shop volunteers

Success milestones: Maintenance tasks are prioritized and publicized.  
Trained volunteers are available for running repairs.  
New volunteers are mentored and trained to increasing skill levels.  
Scheduled preventive maintenance is performed.

### **Task 2: Engage Professional Maintenance Services for Skilled Repairs**

Time: Ongoing

Talent: Trustee committee  
Hired professional

Success milestones: Qualified professional maintenance is performed as needed.  
Maintenance services are fully funded.  
Repairs are performed according to priorities, a maintenance schedule, and a work plan.

## **STRATEGIES TO ENHANCE THE RESTORATION PROGRAM**

### **Task 1: Develop a Restoration Plan**

Time: Ongoing

Talent: Board of Trustees

Success milestones: A conservation survey is performed.  
A prioritized list of restoration projects is maintained  
Priorities are revised as collections warrant.  
Restoration priorities are publicized on the Museum's website.

### **Task 2: Develop a Restoration Funding Program**

Time: Ongoing.

Talent: Board of Trustees  
Treasurer  
Development Director

Success milestones: Available grants for conservation survey work are obtained.  
A prioritized list of restoration projects is publicized with costs.  
Designated gifts are accepted for restoration of individual cars.  
An active planned giving program is in place.  
A program is established to solicit donations of money and materials.

### **Task 3: Carry Out Funded Restorations**

Time: Ongoing

Talent: Operations staff and repair contractors

Success milestones: Car shop staff undertakes achievable in-house projects.  
Contractors are hired to carry out projects beyond the abilities of the car shop staff.



## 6. Museum Facilities and Infrastructure

This category includes buildings, demonstration railway, security, emergency preparedness, and safety.

The Museum is located on a 175-acre site north of Bonifant Road within the Northwest Branch Park of the Maryland-National Capital Park and Planning Commission in Montgomery County, Maryland. Current facilities include a visitor center (including three exhibit halls, a classroom, an auditorium, a gift shop, and restrooms), a maintenance and storage carhouse, rectifier building, a petroleum products storage building, a wood shop, a lawn maintenance storage building, a demonstration electric railway, and three storage containers.

The Museum plans to create a plaza inside the loop area west and south of the visitor center. Extensive information on the circumstances of these plans are found in the New Railway and Building Complex report prepared by Murray & Associates Architects and Macris, Hendricks, and Glascock, dated November, 1999. The Museum recognizes the need to establish funding resources to maintain its campus and to complete a plaza as planned.

### **Task 1: Establish Emergency/Disaster Plans**

Time: Ongoing

Talent: Director of Administration  
Safety Officer  
Local emergency services

Milestone: Have a plan in place to guide Museum staff.  
Have appropriate information available for responding emergency personnel.

### **Task 2: Maintain and Improve the Demonstration Railway**

Time: Ongoing

Talent: Staff  
Contractors

Milestone: The railway (track and overhead) is inspected regularly.  
Museum staff follow a maintenance schedule for railway components.  
A crosstie replacement schedule is funded within the capital budget.  
The railway between Dodge Siding and Fishhook Loop is rebuilt to the standards of the section from caryard to Dodge Siding.

## **7. Funding**

This category includes fees and proceeds, establishment of funding priorities, and development of fundraising strategies.

### **FINANCIAL ANALYSIS AND PLAN**

#### **Present Condition:**

Based on the limited historical information available, as well as discussions with key volunteer staff, the National Capital Trolley Museum (NCTM) appears to be in solid financial condition at this time:

- 1 Financial statements, reviewed by the Museum's outside auditor for the fiscal year ending October 31, 2012, indicate cash on hand of about \$60,000, a merchandise inventory (at cost) of \$26,000 and miscellaneous current assets of \$8,000, with current liabilities of less than \$1,500 and net assets of about \$659,000 (including \$38,000 of restricted assets).
- 2 The Museum has buildings and railway with a book (cost basis) value of about \$325,000, plus rolling stock with a book (cost basis) value of \$240,975.
- 3 On a market value basis, the rolling stock (streetcar collection) is worth considerably more than its book value.
- 4 The museum has no long-term debt, and very little short-term debt. The Museum is essentially debt-free.
- 5 For FY 2012, the Museum had cash and cash equivalents of \$47,744 at the beginning and \$59,505 at the end, producing an increase of \$11,761.

### **Prognosis:**

The Museum realizes that it needs to establish three part-time, paid staff positions:

- Volunteer Coordinator;
- Director of Marketing, and,
- Superintendent of Car Shop.

The current financial situation provides for a minimal amount of net income, but the magnitude of this income (expected to be about \$12,000 per year under the current revenue stream) is not sufficient to cover the expenses that would be incurred for additional paid staff. Clearly, the Museum must grow its revenues if it is to remain healthy into the future.

### **Revenues:**

The Museum believes its current admission pricing and facility use fees are consistent with the local market. Other areas of the SBP address goals to improve marketing and programs in order to increase the revenue base.

Recent development work focuses on marketing the Museum to the public. After a ten percent increase in visitation from 2010 to 2011, visitation in 2012 was flat, and the trend continues in 2013. The perception persists that the Museum is closed as a result of the 2003 fire and/or construction of the InterCounty Connector. Generally, the Museum relies solely on free listings and announcements in the press. As media markets have changed, the opportunity for these listings are more limited and thus no longer effective in reaching a broad audience in the metropolitan area. Efforts are being made to locate a consultants with local experience in branding and marketing who might provide free guidance to Museum staff and the Board of Trustees, to improve management of social media opportunities, and to pay selectively for advertising.

### **Collection Enhancement and Restoration:**

The Museum has a formal but flexible capital program that will provide for the restoration of approximately six trolleys, at a cost of \$2.2 million. In keeping with the Museum's aversion to indebtedness, funds are raised for each car until sufficient moneys have been accumulated to complete all (or at least a portion) of the work on a car; at that time, funds are expended for the restoration work. This is analogous to the "pay as you go" financing used by some local governments for capital projects.

Based on historical data from the restoration of JTCO 352 and TARS 678, the average project life for major restoration of a car is 5 years. At an estimated cost of \$500,000 each, this is \$100,000 per year.

**Development Plan:**

The Museum will create a Development Plan outlining short and long-term goals to support the SBP to focus on annual campaigns and planned giving opportunities to support the goals outlined in this document.

**8. Accessibility**

This category includes making facilities and equipment accessible to all possible audiences.

STRATEGIES FOR IMPROVED ACCESSIBILITY

**Task 1: Enhancing Hours and Visitor Programs**

Time: Ongoing

Talent: Superintendent of Railway Operations  
Education Director

Success milestones: Program plan is in place.  
Facilities are available for rent by private and community groups.  
Facilities are available at night.  
Scheduling is flexible to accommodate special and community events.

**Task 2: Improve Signage**

Time: Ongoing

Talent: Operations staff  
MNCPPC  
Maryland State Highway Administration  
Tourism organizations

Success milestones: Directional signs are posted on approach highways.  
Effective signage is posted on local roads.  
The Museum entrance sign entices drop-in visitors..  
On-property signage is attractive and highly informative

### **Task 3: Accessibility of the Demonstration Railway**

Time: Medium

Talent: Museum staff  
Local emergency services personnel

Success milestones: The Museum studies options to offer accessibility to rides on the demonstration railway consistent with its collections policy, with available emergency services, and with Americans with Disability Act standards.

## **9. Corporate Relations**

This category includes promotion and maintenance of positive relations, channeling of contacts, development of business plans, ethics, timeliness, sensitivity to corporate images, and conduct while on properties.

### **STRATEGIES FOR IMPROVED CORPORATE RELATIONS**

#### **Task 1: Utilize Organizational and Community Partnerships**

Time: Ongoing

Talent: Trustees and staff  
Director of Marketing

Success milestones: The Board of Trustees works through a business partnership committee.  
Reciprocity and partnering opportunities are pro-actively sought.  
The Museum hosts forums, exhibits, and displays.  
Local leaders are well-informed about and supportive of the Museum.  
The Museum provides recognition of neighbors, contributors and, others in a public manner.  
The Museum provides attractive opportunities for community service.

## **Task 2: Expand Promotional Outreach**

Time: Ongoing

Talent: Operations staff  
Trustees and staff  
Director of Marketing

Success milestones: The Museum uses social media to attract visitors to the Museum.  
The Museum holds contemporary transit forums, exhibits, and displays.  
The Museum actively solicits partnering opportunities.  
The Museum hosts joint promotional events with appropriate partners.  
The Museum provides speakers to schools and community groups.  
Advertising is effectively placed and visible.  
Contributions and other support are acknowledged in a public manner.