



Exploring Possibilities for the Atlanta Streetcar Museum

PRESENTED BY

ULI Center for Leadership | mTAP Team 6

PRESENTED TO

Central Atlanta Progress

APRIL 30, 2012





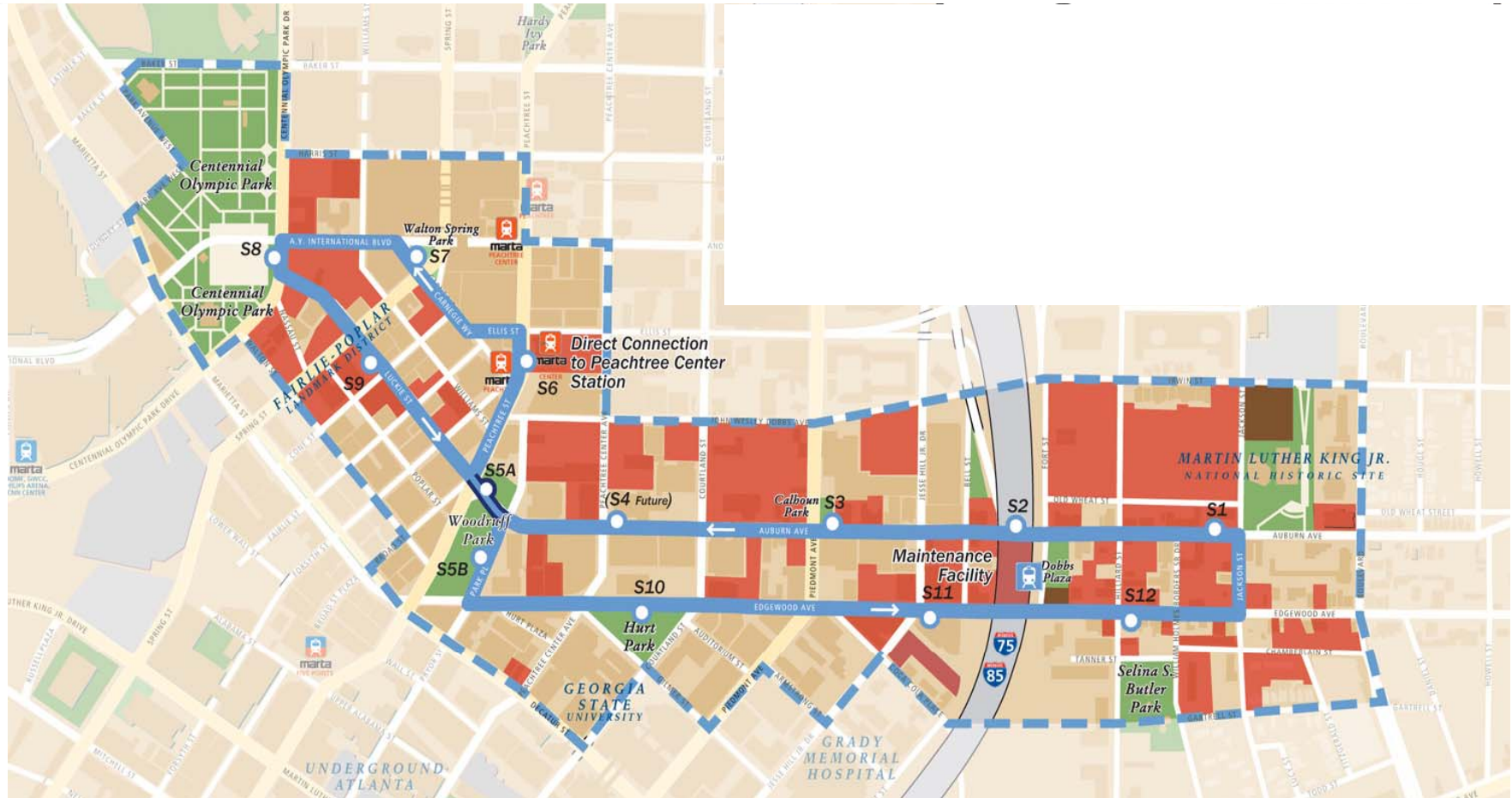
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The Atlanta Streetcar





Situational Summary

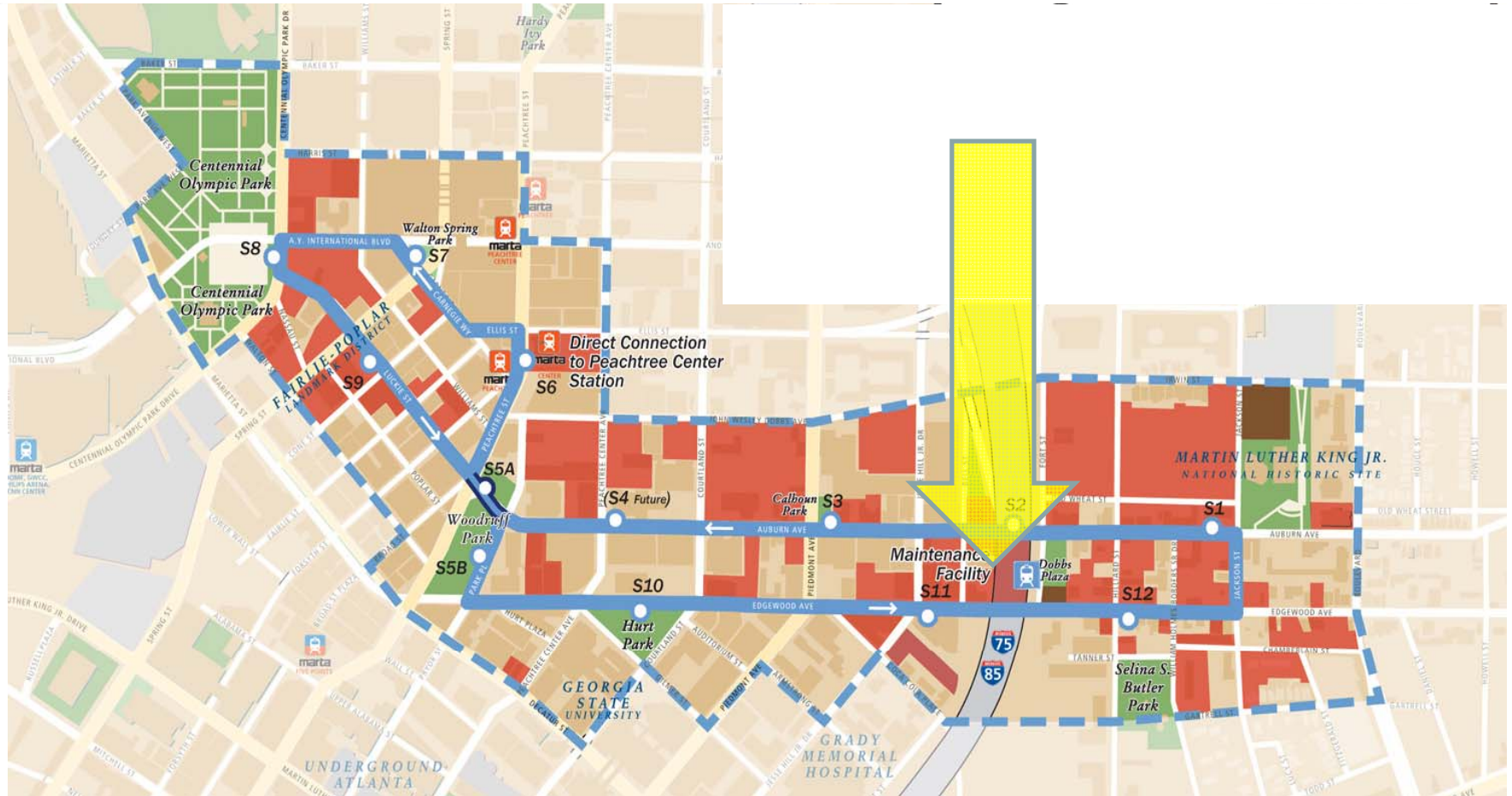
- Idea originated in TIGER II funding application:

Light Maintenance Facility...located on the historic Auburn/Edgewood corridor beneath the I-75/85 overpass and will include a transit museum...No funding from TIGER II will be used for museum components, which will include MARTA's historic collection of vehicles, exhibits, land use and sustainability...existing relationships will be engaged with the facility...museum will add a place-making component to...Auburn Avenue...and will complement existing educational attractions...



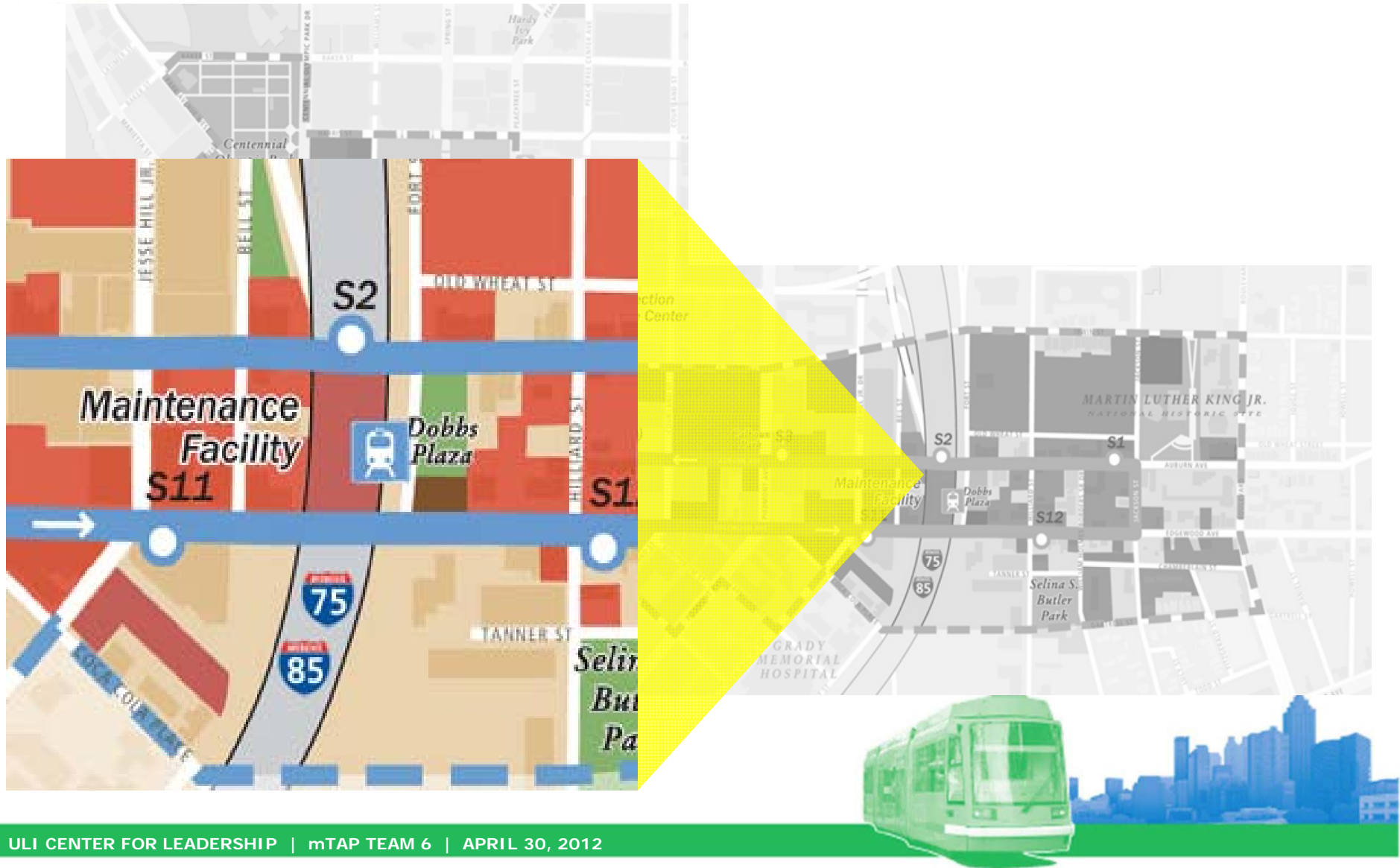


The Atlanta Streetcar





The Atlanta Streetcar





Situational Summary

BEST PRACTICES
FUNDING
RETAIL
PARTNERSHIPS
COSTS
NEIGHBORHOOD
SITE
CONNECTIVITY





Discussion Areas

- Existing Transportation Museums
- Tracking Toward Feasibility: Options
- Funding Sources
- Partnerships & Alliances
- What's Next





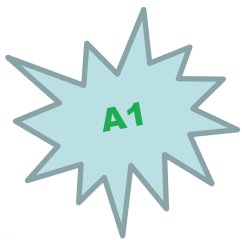
Existing Transportation Museums





Existing Transportation Museums

- At least 24 Operating Transportation Museums in North America (23 U.S., 1 Canadian)
 - 21 are members of Atlanta based ARM (Association of Railway Museums)
 - Association of Railway Museums could be a great resource (see document in appendix on rail museum best practice)





Existing Transportation Museums

- Southeastern Railway Museum, Duluth, GA
 - 35 acres, 90 train cars, buses, locomotives, etc.
 - Capital projects financed largely through grants
 - Revenue is 45% through gate receipts, 18% gift shop (rest is leased fleet, pavilion rental, educational tours, special events)
 - Dedicated “Party Car” for special events



A2-3





Existing Transportation Museums

- Minnesota Streetcar Museum, Minneapolis, MN
 - 300 sq. ft. depot (tickets/gifts) with no amenities, but urban
 - 2 lines (1 mile and .5 mile) on historic rail line
 - 100% Volunteer
 - ~40,000 riders annually
 - \$2 admission for ride
 - ~\$70K annual operating costs
 - Grants fund capital expenses





Existing Transportation Museums

- Trolley Museum of New York, Kingston, NY
 - 11,000 sq. ft. with visitors center, offices, restrooms
 - Several additional cars outdoors
 - 1 line on historic site
 - 1 staff member & volunteers
 - ~3,000 attendees annually
 - \$6 adults & \$4 seniors/kids
 - \$60,000 annual op. costs
 - \$1.5m of grant funding (5 yrs)
 - Web presence key to success





Existing Transportation Museums

- Seashore Trolley Museum, Kennebunkport, ME
 - 330-acre site with multiple buildings near the boardwalk
 - 1.5 mile line on historic site
 - 20,000 attendees annually
 - 10 staff members plus volunteers
 - \$6 adults & \$4 seniors/kids
 - ~\$1M annual op. costs
 - Operations endowment is a key to success





Existing Transportation Museums

- National Capital Trolley Museum, Colesville, MD
 - 17,000 sq. ft. plus several acres site in suburban DC
 - 1 mile demonstration line
 - Extensive facilities with shops, library, auditorium, classrooms, offices, etc.
 - Designed so that as few as 3 staff can operate
 - 12-20K attendees annually
 - \$7 adults & \$5 seniors/kids
 - ~\$100,000 annual op. costs





Existing Transportation Museums

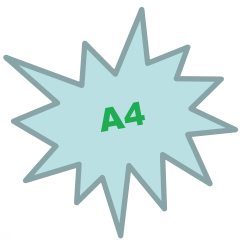
- Market Street Railway Museum San Francisco, CA
 - 650 sq. ft. building
 - Extensive 20hr a day system
 - 35 municipal transit staff, 3 museum staff and volunteers
 - 20,000 riders daily
 - \$2 for 2 hours
 - Governed by state, local, fed
 - Heritage cars on heritage lines very active





Existing Transportation Museums

- Takeaways
 - Urban settings with surrounding draws/amenities work well to draw people in and offset need for public amenities such as restrooms and dining facilities
 - Historical significance of site/line is helpful, but not critical
 - Streetcars can serve as moving museum spaces that may offset the need for large museum space
 - Maintenance can be carried out on or off site with success





Existing Transportation Museums

- Takeaways
 - Significant grant funding is available for capital expenses (ISTEA, TEA-21)
 - Special events around holidays, city events, sporting events, etc. can drive attendance
 - Ticket prices range from \$2-7 for museum attendance and/or a ride
 - Admissions and grants are two primary revenue sources with merchandise sales and donations following
 - Budgets range from \$50K-1M

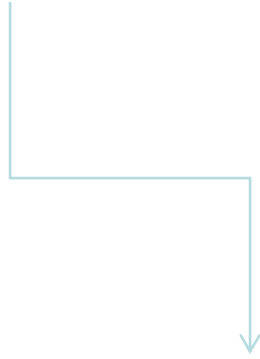




Existing Transportation Museums

- Takeaways
 - Volunteers are critical to daily operations
 - Volunteers come from all walks of life, but are generally transportation enthusiasts
 - Volunteer bases are aging which presents a problem for museums
 - Boards are critical to successful governance of private organizations
 - Allows for nimble decision making
 - One highlighted drawback to board structure is the danger of failing to engage a larger group resulting in stagnation and/or a lack of creativity.





Tracking Toward Feasibility: Options





Tracking Toward Feasibility: Options

- New Construction
- Street Level Retail
- Moving Museum
- Interpretive Art / Kiosks
- Sweet Auburn Curb Market Display





Tracking Toward Feasibility: Options

- New Construction
 - Maintenance Facility (between Edgewood and Auburn)
 - Site currently planned to house the following:
 - Structure with small office, restroom, etc.
 - Storage area for street cars when they are being repaired or stored at night
 - Traction power substation
 - Possibilities
 - Add onto planned structure a small space that could be utilized as museum
 - Install fencing at site that could include interpretive art work that could communicate historical perspective of street cars in Atlanta
 - Challenges:
 - Use of site will be focused on maintenance and storage
 - Located in area that does not have significant amount of pedestrian traffic
 - Could a museum in this specific location be self-supporting?





Tracking Toward Feasibility: Options

- New Construction
 - Build new museum on downtown Atlanta site
 - Possibilities
 - Provides flexibility in size and requirements for museum
 - Provides flexibility in selecting location that is in higher traffic area
 - Provides opportunities for future expansion
 - Challenges:
 - Greater upfront capital costs as well as operating costs
 - Raising money for purchase of property and building of museum
 - Making museum financially self supporting
 - Locating site that would work for museum requirements as well as be in good location for visitors
 - Assumptions for Scenario Analysis:
 - ½ acre of land (\$60/SF)
 - 5,000 Square Foot Museum (\$165/SF)
 - Parking and outdoor space for street car, etc. (\$100,000)





Tracking Toward Feasibility: Options

- New Construction





Tracking Toward Feasibility: Options

- Start-up Costs

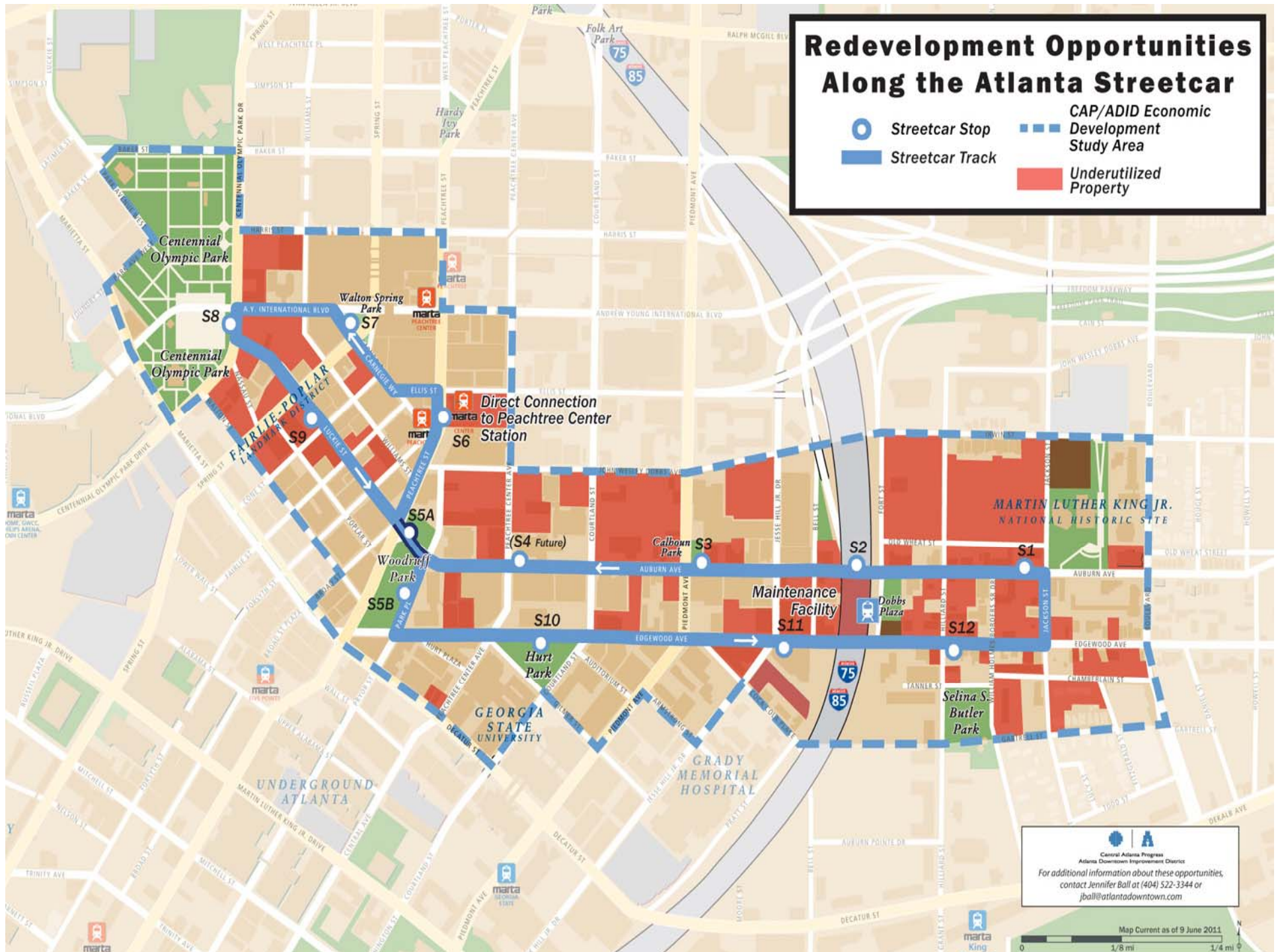
START UP COSTS – NEW MUSEUM

LAND	\$	1,300,000
SITework	\$	100,000
BUILDING CONSTRUCTION	\$	825,000
EXHIBITS & FF&E	\$	200,000
ARCH, ENG & FEES	\$	350,000
LEGAL	\$	50,000
INSURANCE & TAXES	\$	50,000
MARKETING	\$	50,000
CONTINGENCY	\$	100,000
Total Costs	\$	3,025,000



 Streetcar Stop
  CAP/ADID Economic Development Study Area

 Streetcar Track
  Underutilized Property





Tracking Toward Feasibility: Options

- Street Level Retail
 - Vacant Rent-Ready Spaces and Under-Utilized Buildings
 - Possibilities
 - Provides flexibility in size and requirements for museum
 - Provides flexibility in selecting location that is in higher traffic area
 - Less Up-Front Capital than New Construction option
 - Challenges:
 - Operating costs
 - Raising money for build-out of museum
 - Making museum financially self supporting
 - Locating site that would work for museum requirements as well as be in good location for visitors
 - Assumptions for Scenario Analysis:
 - 2,000 Square Foot & 5,000 Square Foot Museum





Tracking Toward Feasibility: Options

- Existing Street Level Retail Space





Tracking Toward Feasibility: Options

- Start-up Costs
 - 5,000-square-foot Museum

START UP COSTS- RETAIL RENOVATION

RETAIL SPACE BUILD-OUT	\$	150,000
EXHIBITS AND FF&E	\$	150,000
DESIGN & PERMITS	\$	35,000
LEGAL	\$	10,000
MARKETING	\$	20,000
Total Costs	\$	365,000





Tracking Toward Feasibility: Options

- Start-up Costs
 - 2,000-square-foot Museum

START UP COSTS- RETAIL RENOVATION

RETAIL SPACE BUILD-OUT	\$	75,000
EXHIBITS AND FF&E	\$	75,000
DESIGN & PERMITS	\$	35,000
LEGAL	\$	10,000
MARKETING	\$	20,000
Total Costs	\$	215,000

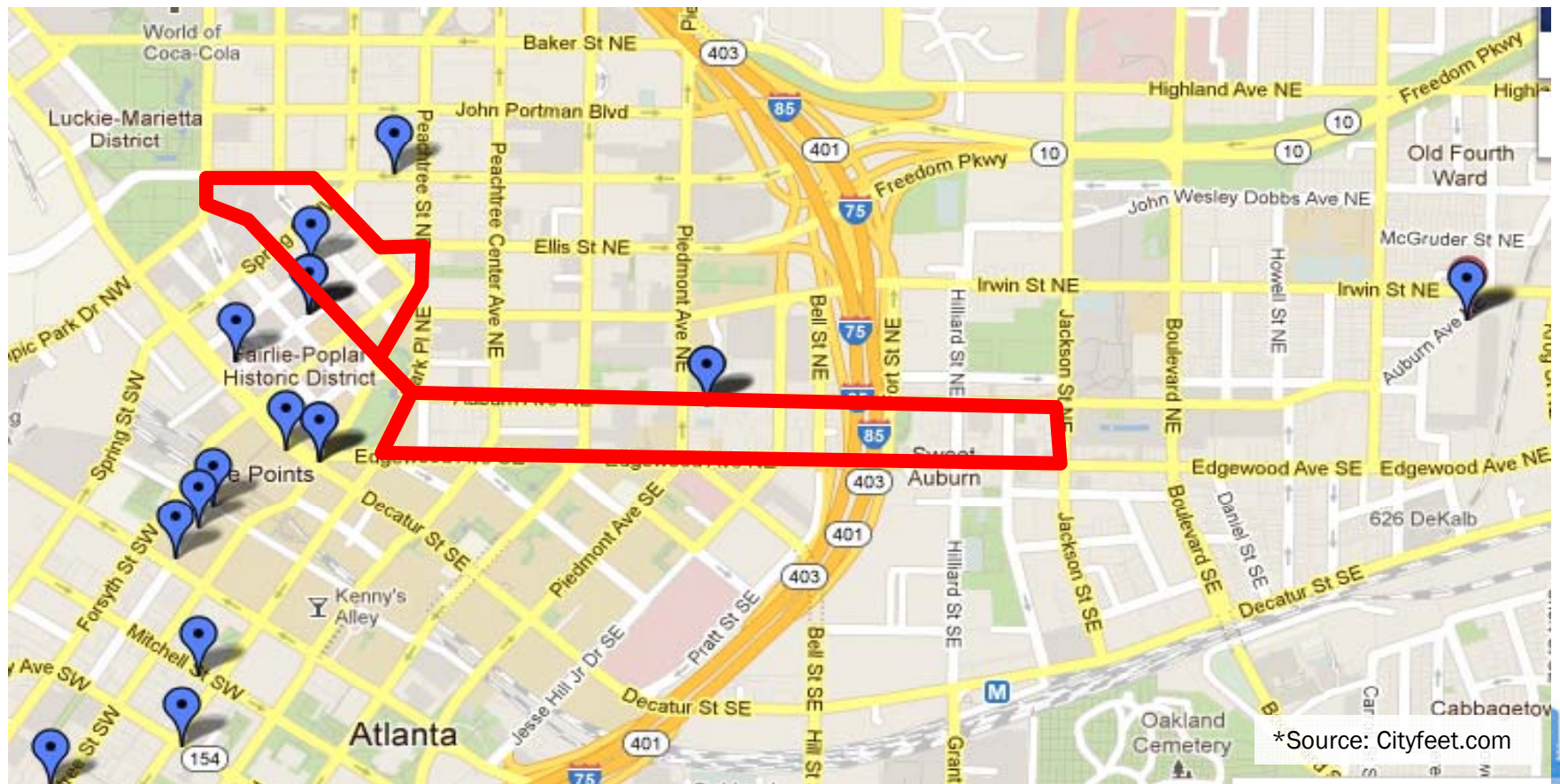




Street Front Retail Spaces- Listed For Rent

Tracking Toward Feasibility: Options

- Street-Front Retail Spaces: Listed for Rent*



*Source: Cityfeet.com



Tracking Toward Feasibility: Options

- Moving Museum
 - Possibilities
 - Renovate an Old Street Car
 - By Appointment Tours
 - Income Generator
 - Challenges
 - Limited Hours and Profile
 - Maintenance
 - Old Car Needs to Work With Streetcar Infrastructure
 - Costs
 - \$500,000-\$800,000, plus operating





Tracking Toward Feasibility: Options

- Interpretive Art & Kiosks



- Possibilities

- Art work along route (i.e. at maintenance facility, streetcar stops)
 - Picture of old streetcars as well as text that explain history of streetcar
- Range from standard art/plaques to interactive kiosks
- Programming can include history of Atlanta streetcar as well as historic perspective on the specific stop along the route

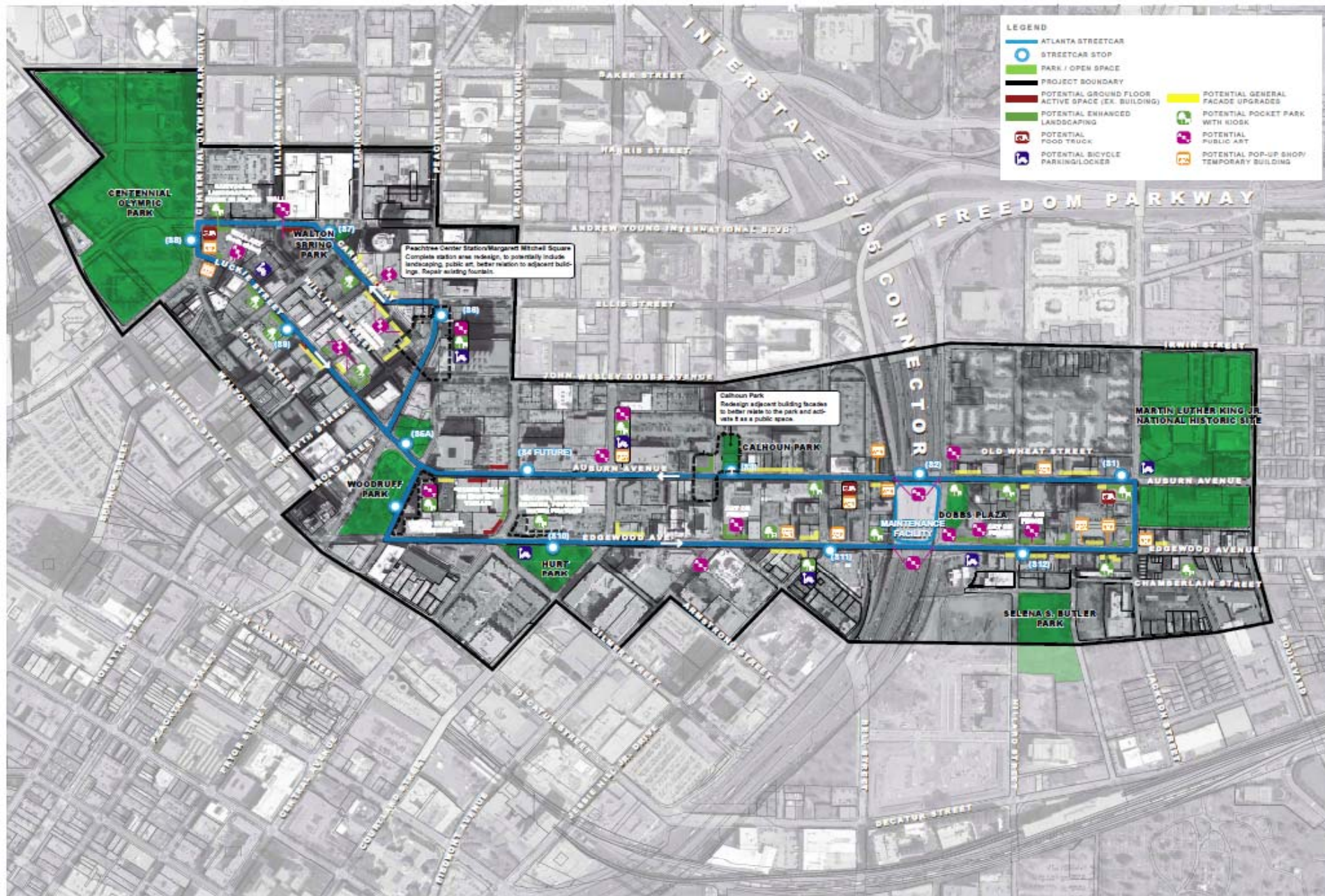
Challenges

- May not be as impactful as having a specific physical space that serves as museum
- If video kiosk, it may require maintenance and upkeep at certain times

- Costs

- Interpretive art work - \$50,000
- Kiosks- \$200,000, plus maintenance





DRAFT SHORT-TERM INTERVENTIONS ATLANTA STREETCAR DEVELOPMENT STRATEGY

Central Atlanta Progress, Urban Collage, Inc., Laminin Group, Stevens & Wilkinson, Tunneli-Spangier-Walsh & Associates,

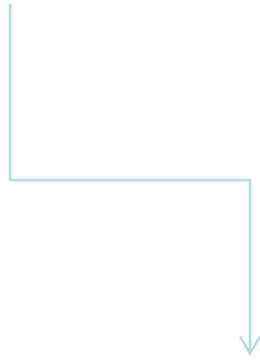




Tracking Toward Feasibility: Options

- Sweet Auburn Curb Market Booth
 - Possibilities
 - Low-impact streetcar history information booth
 - Could rent space for nominal amount/free
 - Could be used at cost-effective educational resource
 - Limited overhead
 - Challenges
 - Visibility
 - If video kiosk, it may require maintenance and upkeep at certain times
 - Costs
 - Under \$5,000 in capital costs plus ongoing marketing materials
 - May need to pay rent





Funding Sources





Funding Sources

Variety of Sources / Variety of Needs

- Long-term (non-capital/operating expenditures)
 - Continuous and on-going
 - Significant funding mechanism for operating costs
- Short-term (capital expenditures)
 - Initial start-up costs
 - Specific capital improvements / collection expansion
 - Educational programming





Funding Sources

Long-term Funding: Day-to-Day Operations

- Participation Funding
 - Admission fees
 - Demonstration rides
 - Museum store/gift shop
- Special Programming
 - Educational
 - Seasonally-themed
 - Collaborative arts





Funding Sources

Long-term Funding: Day-to-Day Operations

- Membership fees
- Endowments





Funding Sources

Short-term Funding: Start-Up Costs

- Corporate Sponsorships
 - The Home Depot, CSX, Norfolk, Georgia Power, Porsche, UPS, Others
- Over 75 Fortune 500 companies headquartered in Atlanta*
- Funding Mechanisms
 - Local Government (improvement districts, bond programs, transportation funds, mitigation funds, etc.)
 - Federal Government (ISTEA/TEA-21, EPA)
 - Foundations





Funding Sources

Short-term Funding

- Capital Campaigns / Fund Drives
 - Individual donors
 - Groups of donors
 - Fundraising strategies and implementation teams
- Partnership/Alliance Opportunities





Funding Sources

Funding Goals & Priorities

- Establish institutional goals & priorities
- Develop the necessary resources to achieve:
 - short-term budgets
 - long-term fiscal planning

Successful funding strategies must include annual giving, institutional membership, and planned giving; and must be aimed at meeting the needs and goals established by the institution.

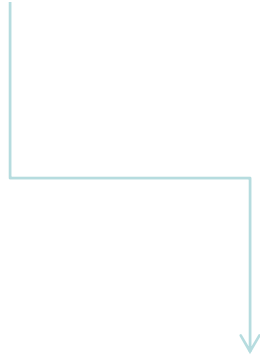




Situational Summary

	New Construction	Retail Space (2,000 SF)	Retail Space (5,000 SF)	Moving Museum	Streetcar Kiosk	Curb Market Booth
Assumptions						
Participation Revenue	\$5.00	\$2.50	\$5.00	\$2.50	\$1,667	\$0
Estimated Annual Attendance	20,000	6,500	15,000	6,500	6,500	6,500
Membership Dues	\$25	\$25	\$25	\$25	\$0	\$0
Estimated Annual Memberships	200	100	150	100	0	0
Museum Staff	3	None	1	2	1	None
Facility Size (SF)	5,000	2,000	5,000	0	0	0
Est. Monthly Occupancy Costs	\$12,500	\$14	\$14	\$0	\$0	\$0
ESTIMATED INITIAL CAPITAL COSTS	\$3,000,000	\$215,000	\$365,000	\$500,000	\$200,000	\$5,000
Summary of Annual Operating Budget						
Total Revenue	\$313,750	\$64,750	\$178,750	\$63,750	\$20,000	\$10,000
<i>Grants & Donations</i>	<i>\$125,000</i>	<i>\$20,000</i>	<i>\$35,000</i>	<i>\$25,000</i>	<i>\$0</i>	<i>\$10,000</i>
Total Expenses	\$307,750	\$64,750	\$177,250	\$63,750	\$20,000	\$10,000
ANNUAL NET INCOME	\$6,000	\$0	\$1,500	\$0	\$0	\$0





Partnerships & Alliances





Partnerships & Alliances

- Categories of Partnerships & Alliances
 - Financial (Sponsorships, Naming Rights, etc.)
 - Volunteers
 - Artifacts / Exhibits
 - Other (Special Events, Marketing, etc.)





Partnerships & Alliances

- Types of Organizations
 - Commercial (e.g. Cousins Properties; Portman Holdings)
 - Political/Governmental (e.g. GWCCA; Metro Atlanta Chamber of Commerce)
 - Educational/Non-profit (e.g. Georgia Tech; Georgia State; APEX Museum)





Partnerships & Alliances: Targets

- Location of Organization (Downtown, Streetcar Route, etc.)
 - Georgia Aquarium; The World of Coca-Cola
 - Deloitte & Touche; Georgia Pacific
 - The King Center; Sweet Auburn Market





Partnerships & Alliances: Targets

- Transportation-Oriented Organizations
 - Other Transportation Museums
 - Association of Railway Museums
 - Norfolk Southern; CSX
 - Transportation/Engineering Programs at Educational Institutions





Partnerships & Alliances: Targets

- Educational
 - Public Broadcasting Atlanta (NPR)
 - Atlanta History Center; Atlanta Preservation Center



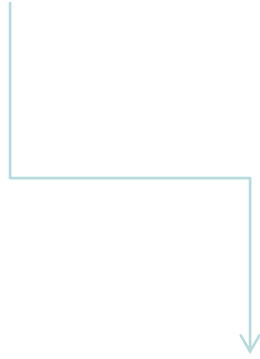


Partnerships & Alliances

Notable Organizations

- Southeastern Railway Museum
- Georgia Historical Society
- Atlanta History Center
- The APEX (African American Panoramic Experience) Museum
- Central Atlanta Progress
- MARTA
- Georgia Power
- The King Center
- The World of Coca-Cola
- Georgia Aquarium
- Georgia World Congress Center
- Metro Atlanta Chamber of Commerce
- Atlanta Preservation Center
- The Georgia Trust for Historic Preservation
- Georgia Department of Natural Resources / Historic Preservation Division
- Georgia State University / Office of Civic Engagement
- Georgia Institute of Technology / Division of Administration and Finance
- Cousins Properties Incorporated
- Portman Holdings, LLC





What's Next





What's Next

Start-Up Phase

- Identify task force
 - Identify goals: What should the museum accomplish?
 - Identify realistic and appropriate solution
-
- Identify funding and capital needs
 - Identify partnerships and alliances
 - Develop branding for museum
 - Develop fundraising and capital programs
 - Develop public awareness campaigns
 - Develop staffing/volunteer plan (depending on solution)



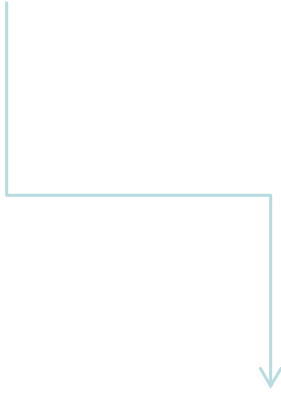


What's Next

Sustaining Phase

- Identify board of directors
- Develop ongoing awareness outlets (social media, events, Downtown Works newsletter, etc.)
- Develop special events if appropriate
- FUNDING: Identify sustaining funding for operations, new/refresh exhibits, maintenance, etc.
- Develop and maintain ongoing partnerships and alliances





Appendix





Addendum

- A1: Existing Railway Museums
- A2: Museum Q&A Summary Data
- A3: Museum Q&A Full Data
- A4: Recommended Best Practices White Paper
- A5: Business Improvement Loan Fund Fact Sheet
- A6: Eastside TAD Program Description
- A7: Westside TAD Program Description
- A8: Financial Feasibility Summary
- A9: Partnerships & Alliances Contacts
- A10: Key Stakeholders





A1: Existing Railway Museums





A1: Existing Railway Museums

Operating Exhibits

- Southeastern Railway Museum: Duluth, Georgia [\[official site\]](#)
- Baltimore, Maryland: Baltimore Streetcar Museum [\[official site\]](#)
- Brooks, Oregon: Oregon Electric Railway Museum [\[official site\]](#)
- Cleveland, Ohio: Lake Shore Electric Railway (under construction; new home of the former Trolleyville USA collection) [\[official site\]](#)
- Colesville, Maryland: National Capital Trolley Museum [\[official site\]](#)
- East Haven, Connecticut: Shore Line Trolley Museum [\[official site\]](#)
- East Windsor, Connecticut: Connecticut Trolley Museum [\[official site\]](#)
- Kennebunkport, Maine: Seashore Trolley Museum [\[official site\]](#)
- Kingston, New York: Trolley Museum of New York [\[official site\]](#)
- Milton, Ontario: Halton County Radial Railway [\[official site\]](#)
- [Mt. Pleasant, Iowa: Midwest Electric Railway](#) | [\[official site\]](#)
- Perris, California: Orange Empire Railway Museum [\[official site\]](#)
- Phoenix, Arizona: Phoenix Trolley Museum (Arizona Street Railway Museum) [\[official site\]](#)
- Rockhill Furnace, Pennsylvania: Rockhill Trolley Museum [\[official site\]](#)
- Rush, New York: New York Museum of Transportation [\[official site\]](#)
- Saint-Constant, Québec: Canadian Railway Museum [\[official site\]](#)
- [St. Louis, Missouri: Museum of Transportation](#) | [\[official site\]](#)
- Scranton, Pennsylvania: Electric City Trolley Museum [\[official site\]](#)
- Shelburne Falls, Massachusetts: Shelburne Falls Trolley Museum [\[official site\]](#)





A1: Existing Railway Museums

- [South Elgin, Illinois: Fox River Trolley Museum](#) | [\[official site\]](#)
- Suisun, California: Western Railway Museum [\[official site\]](#)
- Union, Illinois: Illinois Railway Museum [\[official site\]](#)
- Washington, Pennsylvania: Pennsylvania Trolley Museum [\[official site\]](#)

Non-Operating Exhibits

The Railroad Historical Center (Greenwood, South Carolina) has two cars of the [Piedmont & Northern Railway](#).





A2: Museum Q&A Summary Data



Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Location Overview						
1) Where is the museum located (e.g., urban, suburbs)?	City of San Francisco, CA	Suburbs	NCTM is in Northwest Branch Park of the Maryland-National Park and Planning Commission, Montgomery County, Maryland. The area around the Park is suburban.	Urban waterfront (small city)	Our Museum has two railways. The Como-Harriet Streetcar Line (CHSL) runs in an urban setting in a Minneapolis city park on one mile of electrified track. CHSL operates on private right-of-way (former Twin City Rapid Transit Co. [TCRT] streetcar line). The other line is the Excelsior Streetcar Line (ESL) that operates in an urban setting on private ROW (former railroad line) on a half-mile of electrified track. Excelsior is a small suburban town located about 15 miles west of Minneapolis.	3 urban 2 suburbs
2) Is there historical significance to the location?	Yes, operates on Market St – main thorough fare and extends to Fisherman’s Wharf, two extensions planned		No; however, there is a long-range plan to develop the Park with picnic shelters designed as trolley waiting stations of the early 20th century.	Yes, former railroad shop and roundhouse facility.	The CHSL runs on a former TCRT streetcar right-of-way (ROW). One of the lines that operated on the ROW (amongst several others) was TCRT’s Como-Harriet line, the last TCRT line to close on June 18, 1954. CHSL was the longest line on TCRT—21 miles from downtown St. Paul through downtown Minneapolis ending in southwest Minneapolis. The ESL runs on a former Minneapolis & St. Louis RR abandoned roadbed through the south edge of Excelsior. Most of the original high-speed streetcar ROW from Minneapolis to Excelsior was converted to streets and roads when the line was abandoned in 1932.	4 historical significance

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Does it correlate to the "streetcar" theme?	Operates vintage PCC, Milan & Historic cars (all built prior to 1952)	Located on the right of way of a former interurban trolley line.		no, other than railroad history of the site.		
3) Are there any surrounding amenities that also create a draw to the location?	Yes	Kennebunkport is an internationally known destination for beaches and shopping.	Not yet.	Yes, waterfront, restaurants, galleries.	CHSL operates in a city park in Minneapolis' "Chain of Lakes" section of the city's world-renown park system. The chain of lakes extended park draws maybe 3-4 million visitors during a typical year. ESL operates in the charming suburban town of Excelsior that is on the south shore of popular Lake Minnetonka. Excelsior has a good mix of retail stores, antique stores and smaller restaurants. Excelsior also is home to the Museum of Lake Minnetonka which restored and operates the historic streetcar- steamboat Minnehaha. The Minnehaha was built by TCRT in 1906 in their shop and operated on Lake Minnetonka from 1906 until 1926 at which time the lake service was ended and the boat was scuttled in the lake. The boat was raised from the lake bottom in 1980 and restoration was finished in the mid-1990s.	4 of 5 yes

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
4) Are there other facilities co-located at the site (e.g., maintenance facility)?	Maintenance is done at another location within city proper	All museum activities are carried out at the site: Interpretation through static indoor exhibits, cars stored inside, operation of cars for the public, restoration and maintenance of the cars, and library activities.	No	We have a single building performing all museum functions--visitor center+gift shop+trolley maintenance+trolley storage+trolley displays. (I would recommend more than one building!)	Both railways have buildings in which our five operating streetcars are stored and maintained. Both lines have a shop section for repairs to our operating streetcars. ESL's shop bay doubles as our Museum's primary restoration shop where we restore historic streetcar bodies to full operation. Our Museum's history reveals that we restore a streetcar roughly every 6-10 years, depending on the magnitude of the restoration, i.e., how bad-off the original carbody was.	Varies
Physical Attributes						
1) What type of facility is the museum located in?	Urban setting for streetcars	It is located on 330 acres of land and consists of a campus of buildings to carry out the tasks listed above plus the 1.5 mile line on which we give rides.		One building jam packed and several cars outdoors.	Our museum is an open-air living history museum. We do not have a formal museum building in the sense that most people equate with a "museum." Our museum is our historic rights-of-way and our authentic and historic operating Minnesota streetcars.	varies
Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)?	The Market St Railway (volunteer group) has indoor museum		The Museum designed its facility so as few as three staff could operate it; a dispatcher, a streetcar operator, and a cashier. The primary exhibit, the one-mile demonstration railway, and an exhibit of street railway track with conduit slot are outside. Other exhibits are inside.	Building is approx. 180'x60' with a mezzanine holding the visitors center, offices, archives. The rail yard is approx. 3 acres, not including operating right-of-way.	Other than the storage buildings where our streetcars are housed and maintained, the only other building we own is a small depot at CHSL. This building houses our token sales counter and gift shop. The depot walls contain built-in display cases containing photos and smaller artifacts interpreting the streetcar era in the Twin Cities.	

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
2) What is the size of the museum in sq. ft.?	650 sq ft.				See above. The depot at CHSL is approximately 15' X 20' and is a recreation of the one that stood on the same site from 1900 until 1914. It is a combination gift shop, token sales counter with historic wall displays. CHSL's car barn can house four 45-foot streetcars with work space in the shop area. ESL's car barn is also capable of housing four 45-foot streetcars, including the storage and work space in the shop area. As mentioned previously, CHSL has one-mile of electrified track and ESL has one-half mile of electrified track. Our track is standard gauge as was TCRT.	Some tiny some huge see below
Indoor?			17,000 square feet			
Outdoor?		No idea what the square footage is. There are 5 carhouse buildings, a large restoration shop, a parts warehouse, a large visitors center, plus the 330 acres mentioned above.	Several acres			

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
3) What is included in the museum facility (restrooms, offices, etc.)?	Offices off site, but within city proper	It seems that you're asking this question from the perspective of something like a traditional art museum where everything is in one building. As you can see from the above that's not the case.	The visitor center includes: 1) reception, Museum Shop, and restrooms; 2) Classroom/ staff break area; 3) Auditorium – 60 seats; 4) Main Hall; 5) Conduit Hall; 6) Street Car Hall; 7) library/archives; plus 8) offices and board room. A street car maintenance facility includes: 1) a carhouse with maintenance pit and 2) an enclosed yard with wood shop, oil house, mower house, and parts storage containers.	As previously mentioned all museum activity including restrooms, offices, exhibits, are in the one building. Trolley ride is 1.5 miles in length.	CHSL in Minneapolis does not have restrooms on site but there are restrooms in a public facility about 200 feet to the east. ESL has restrooms in the car barn that are available to the public, as part of the ride at ESL includes a tour of the interior of the car barn which houses two other streetcars and has historic displays. Our Museum has no dedicated office space although we do have plans to build an office at our CHSL car barn when funds become available to pay for the expansion. This is around 3-4 years in the future.	Some have extensive resources others nothing
What components / exhibits / artifacts are included on the museum grounds?	Photos, small exhibits, interactive media, display of car front	There are in excess of 200 vehicles, comprising horsecars, cable cars, electric streetcars, interurban cars, subway and elevated trains, trackless trolleys, and buses. There are also two historic copper clad buildings (one a switching tower, the other a station) from Boston's former elevated railway.	Main Hall features the permanent exhibits, Street Car Communities, Rock Creek Railway Company (and O gauge model), and Street Cars Go to the Movies. Conduit Hall includes the permanent exhibits, The Conduit Story and Trolley Power.	One operating trolley, several other trolleys and a subway car open for display. Visitor's center includes gift shop, theatre, restrooms, various displays.	See above responses. Our main artifacts are our five operating historic Minnesota streetcars. We also own three streetcar bodies, one of which is undergoing complete restoration at our Excelsior shop.	Mainly the vehicles

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Are there rotating exhibits, if so please describe?	Yes, deals with city events + culture like earthquake, ball parks...,	Cars in operation change regularly. Traditional exhibits change less frequently.	The wall along the outside of the auditorium is dedicated to rotating exhibits. Currently, there are four: Promoting Transit, Trolleyman at Work (late August to early September), Homefront Street Cars (late May to early June), and Jim Crow on Streetcars (February). The selection of cars exhibited in Street Car Hall and of the cars operated on the railway also changes.	Occasionally we have a visiting/temporary exhibit. Most of the partitions and displays can be moved around to accommodate various functions in the gallery.	We attempt to operate our streetcars on a rotating schedule to provide variety to both our passengers/customers and for our operating personnel. This is true at both railways. Static displays at both railways pretty much stay the same although our archivist periodically freshens them up usually at the beginning of the season (i.e., first weekend in May).	Most like special events
Operational Summary						
What is the average annual attendance at the museum?	Approx. 20 thousand ride cars each day	Around 20,000	Museum attendance is recovering from the closure of the Museum for fourteen months during relocation (2008 to 2009). The Museum also suffered a major fire in 2003. So when visitors finally find the Museum, they may say that they thought the Museum was buried under the new highway or had burned completely. The near-term goal is 20,000; last year's attendance was 12,000.	I'm travelling as I write this so I don't have figures for 2011 in front of me, but we are open weekends during the summer and have 2-3000 visitors annually.	CHSL – 35,000 ESL – 6,000	20K daily-2,000 annually
What are ticket prices?	\$2.00 for 2 hours	\$6 adults \$4 children/seniors	Admission including car fares is \$7.00 (ages 18 to 64) and \$5.00 (ages 2-17 and 65+).	\$6 adult, \$4 children/seniors.	Standard fare for a 15-20 minute ride at both railways is \$2.00 for anyone four years of age and older. We do not offer senior or retired discounts. We also sell 10-ride, 25-ride, and all-season family passes at a small per-ride discount. Members who join our Museum get unlimited rides on both railways.	\$2-7

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Are there membership tickets, if so what is the price?			Museum members are admitted free.	All membership levels include unlimited admission, start at \$25	Member dues are \$30 for an individual, \$45 for a household, \$500 for lifetime membership. A half-hour streetcar charter costs \$75 for non-member, \$55 for a member.	3 of have membership
What are major sources of annual revenue and what is there general percentage of overall revenues		Admissions around 13%, Membership dues 5%, Museum Store sales 19%, Donations and Grants 54%, Investments 6%, Miscellaneous 2%. These numbers vary from year to year but this is representative.	Gate is 65%; Museum Shop is 25%; Facility Rental is 6%; Unrestricted donations are 4% of the operating budget.	I can't quote exact numbers at this time but I'd estimate 70% general admission+gift shop, 15% charters, 15% membership.	Streetcar rides – 34% Season passes, charters & special events – 15% Merchandise sales – 13% Donations/grants – 32% Member's dues – 8%	Admissions and Grants are 2 primary sources
Are there special events? If so, what kind? Are there attendance spikes for these events, if so explain. Are there attendance spikes for these events, if so explain	City held events	Special events include Halloween themed events, Christmas themed events, events targeted at enthusiasts of one type of equipment or another or from a given region. The prices vary as appropriate to the size and duration of the event. Of course there are attendance spikes otherwise we wouldn't hold the events! See the website for more.	Yes, there are special events to boost attendance, but regular admission applies.	Yes, generally tied to other waterfront events sponsored by the City or local businesses, of which there are several per year scattered through the tourist season. Usually we don't change admission policy during special events. Sometimes we'll have a joint ticket related to the event.	We operate the following special events: PJ Trolley/Storybook Trolley; pumpkin patch trolley; Halloween ghost trolley; and, Santa Claus trolley. We also operate a murder mystery trolley and a summer trolley camp (one-day event) for youngsters at CHSL. We are going to reprise our "moonlight trolley" (ride is after dark when we normally do not operate) this year after a 2 year hiatus. All of these are extra-fare events with the fares charged varying depending on the event. Special events account for around 25% to 30% of farebox revenues, which is remarkable considering that about ten days of operations yields around 25-30% in farebox revenue.	Lots of special events especially holidays

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
How many staff are included on the payroll?	MUNI CCSF – 35 key support staff, MSRy. museum 3	Around 10.	A part-time educator and a Museum Shop cashier are on the payroll.	One seasonal part-time administrator. All other functions performed by volunteers.	We do not have any paid employees. We are all volunteers.	all volunteer to 35 staff
What are the average annual operational costs of the museum?		Typically \$750,000 to \$1,000,000	99000	\$60,000 +/-	CHSL -- \$29,800 ESL -- \$19,400 Museum Admin/Overhead -- \$16,300	~\$50,000-1M
Are there any important operational efficiencies you want to share?		Can't think of any		We have a strong partnership with the City of Kingston. We are a private non-profit corp, but the property is leased from the City. Most major capital improvements are administrated by the City.	None that come to mind. Being all-volunteer certainly helps the bottom line. Having even one paid employee would be a financial drain for us, not to mention the complications associated with payroll withholding, retirement funds and such.	
Are there any funding sources that support the operational costs?		Admissions and store sales supplemented by an annual fund drive among membership.		Not usually. We find that operational grants are hard to come by.	Our farebox revenues, including revenues from special events, charters, etc., pay for our direct operating expenses, e.g., electricity, insurance, maintenance, etc..	
Were there funding sources or grants that assisted with initial capital costs of the museum construction / renovations?	City, state and fed money for vehicles	Initial capital cost (1939 to 1960s) was born by the museum membership.	Maryland bonds bills, TEA-21 funds, Montgomery County capital improvement funds, State Highway Administration mitigation funds, and private donations	Capital projects we've done quite well lately. In the last 5 years we've benefitted from \$1.5M in government support for capital projects, including track rehab, new parking lot, building upgrade, erosion repairs. Sources have included New York Department of State, Environmental Protection Fund, federal earmark.	We have been fortunate over the years to successfully tap into the federal ISTE/TEA- 21 grant programs to expand our car barn streetcar storage buildings several times and to rebuild our one mile of track at CHSL. The entire Excelsior Streetcar Line and associated car barn structure was also built using federal ISTE/TEA funds.	lots of grant money for capital costs
Governance Structure						

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
What is the nature of the governance structure?		12 person board of trustees elected by donors, with vote weights based on cumulative contributions	Please see the Museum's website section, About the Museum, for governance and strategic planning.	Non-profit educational corp. Self-perpetuating board of trustees (i.e., general membership has no voting rights).	Our Museum is governed by an 8-member Board of Directors. The Museum is managed by several supervisors/managers led by the General Superintendent. If you wish, I can send to you our organization chart or you can look at it on our website.	Boards are critical
What are the details of this structure?	CCSF, Ca. PUC, Fed.					
What are the pros and cons?		Beyond the scope of what can be answered here easily.		Board of trustees governed by constitution and by-laws. Pros: small governing body can be 'nimble' reacting to change. Cons: small size can stagnate with no new blood for long periods of time.	See previous response. Not sure how to answer the "pros and cons" question. Our organizational structure seems to work well for us. One problem we do have is finding volunteers willing to fill some of the management positions.	nimble, but stagnant
Partnerships						
Is there a core of volunteers that assist with operations and / or governance?		Largely a volunteer organization	Yes	Critical to our existence. It wasn't until 4 years ago we had our first-ever paid employee.	We are an all-volunteer organization with slightly over 300 dues-paying members. Our Operating Department has approximately 90 active volunteers. There are approximately 15 non-operating volunteers working on shop and outside physical plant projects, e.g., repairing/maintaining track and overhead trolley wire. Many of these volunteers also do double-duty by working on non-operating areas such as shop repairs and restoration, management positions, Board of Directors, etc.	Volunteers are critical to 4 of 5

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)?	Yes	Come from all walks of life	While many would think the volunteers are dedicated trolley fans, they really come from many backgrounds to interpret history, to participate in restoration/maintenance, or to give back to society.	No. Generally a mix of blue and white collar backgrounds. No major rail employer in area.	There is no one identifiable source for our volunteers. They come from all walks of life and professions. The majority of our volunteers are not a traditional "railfan." Of the approximately 110 active volunteers we have, probably 20% to 25% are retired.	Generally all walks of life
What is the health of this volunteer group (is it growing, declining, stable)?	Some retired city staff, some from other private agencies, Stable in some areas, declining in others	Getting older, key issue as with all other such museums is attracting new younger people.	Always too small, but curiously stable over forty years	Stable, but at too low a level!	The age of our volunteers is an issue for our organization as it is for virtually all similar volunteer transit or railroad Museums. We recruit new operating personnel each year to attempt to fill the gaps as volunteers drop out, move away, etc. Our older volunteers eventually retire from active volunteering or get to the point where they can no longer contribute. Over the last few years we've been fortunate to recruit about a half-dozen very active retired men to work on various projects in our shops, including our on-going restoration of a rare streetcar.	Older
Are there strategic corporate partnerships? If so, what is the nature of their support (e.g., gifts-in-kind, volunteers, special events/exhibits, monetary support)?		No.	Corporate partnerships are to be developed.	We participate in matching grant programs from all major employers. We'd love to have more partnerships, but no large business in this small city. We are trying to get the small business owners along the waterfront to become more of a stakeholder in the museum's future.	We do not have any direct partnerships with corporations, although we would like to.	Not really significant
Key Lessons						

Appendix 2: Museum Q&A Summary Data (from Questionnaires)

	San Francisco	Seashore	NCTM	Trolley Museum of NY	Minnesota	Totals
Are there any key lessons that would be important for an application in Atlanta?		Build an endowment to support operating expenses.	Too little information from your end to address "an application in Atlanta."	From your abstract I can't tell if your museum is intended to be a government institution or a private organization. That's a significant distinction. If tied to the government, you are at the mercy of potentially huge swings in the budget. Non-essential areas are always subject to cut. But if Atlanta already has a sizeable and healthy municipal museum institution, then making the trolley museum part of it might make sense. If you will be a private non-profit, then you should develop a business plan.	This question is too open-ended to give an adequate response on a questionnaire such as this. It's hard to give lessons learned or make recommendations here as I am not very familiar with the proposed Atlanta operation. I'm not entirely sure how our all-volunteer Museum's experiences or lessons learned will help the Atlanta operation and Museum.	
Anything else you would like to share?	The "F" line is a part of the city (SFMTA) transit services. The service began in earnest in 1995, but had several summer only service dating back to the 1980s. The "F" line operates 20 hours a day, seven days a week and provides service 20 older (pre-1952) cars in service each day. The SFMTA also provides light rail service on 5 other lines with modern light rail cars, plus cable cars, trolley bus and bus routes. The F line also co-mingles with Modern Light rail transit services on one route on a daily basis. The F line provides both commuter and tourist service seven days a week. Depending on the nature of the questions we may be able to assist in the city environment. SFMTA also partners with the Market St Railway. They are a mostly volunteer group, but do have paid staff in the Museums store/museum.		Draft a mission statement.	TMNY is both one of the older and one of the smaller trolley museums. We've had our share of failure and false starts in our 55-year history, but due to a small core of dedicated volunteers have always somehow prevailed. I'd like to think our web site, " http://www.TMNY.org ", is better than average for a museum as small as we are and I encourage you to browse it for more information. I would be happy to make our governance documents available to you if you are interested, though we do have a total rewrite of our by-laws in progress at this time since the existing by-laws are 30+ years old.	Please call me with questions, comments, etc. I'll do my best to help you out in any way possible. Jim Vaitkunas Minnesota Streetcar Museum 952-688-7255 jvaitkunas@msn.com	SF-is a transit system; draft a mission statement; folks are really willing to help



A3: Museum Q&A Full Data



STREETCAR MUSEUM QUESTIONNAIRE-Trolley Museum of New York

Location Overview

Where is the museum located (e.g., urban, suburbs)? Urban waterfront (small city)

Is there historical significance to the location? Yes, former railroad shop and roundhouse facility. Does it correlate to the “streetcar” theme? no, other than railroad history of the site.

Are there any surrounding amenities that also create a draw to the location?

Yes, waterfront, restaurants, galleries.

Are there other facilities co-located at the site (e.g., maintenance facility)?

We have a single building performing all museum functions--visitor center+gift shop+trolley maintenance+trolley storage+trolley displays. (I would recommend more than one building.)

Physical Attributes

What type of facility is the museum located in? Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)? One building jam packed and several cars outdoors.

What is the size of the museum in sq. ft.? Indoor space? Outdoor space?

Building is approx. 180’x60’ with a mezzanine holding the visitors center, offices, archives.

The rail yard is approx. 3 acres, not including operating right-of-way.

What is included in the museum facility (restrooms, offices, etc.)?

As previously mentioned all museum activity including restrooms, offices, exhibits, are in the one building. Trolley ride is 1.5 miles in length.

What components / exhibits / artifacts are included on the museum grounds?

One operating trolley, several other trolleys and a subway car open for display. Visitor’s

center includes gift shop, theatre, restrooms, various displays.

Are there rotating exhibits, if so please describe?

Occasionally we have a visiting/temporary exhibit. Most of the partitions and displays can be moved around to accommodate various functions in the gallery.

Operational Summary

What is the average annual attendance at the museum?

I'm travelling as I write this so I don't have figures for 2011 in front of me, but we are open weekends during the summer and have 2-3000 visitors annually.

What are ticket prices? Are there membership tickets, if so what is the price?

\$6 adult, \$4 children/seniors. All membership levels include unlimited admission, start at \$25.

What are major sources of annual revenue and what is there general percentage of overall revenues (i.e., gate admission (43%), gift shop (19%), pavilion rental (9%), educational tours (9%), and special events (5%)?

I can't quote exact numbers at this time but I'd estimate 70% general admission+gift shop, 15% charters, 15% membership.

Are there special events? If so, what kind? What is the associate ticket price? Are there attendance spikes for these events, if so explain.

Yes, generally tied to other waterfront events sponsored by the City or local businesses, of which there are several per year scattered through the tourist season. Usually we don't change admission policy during special events. Sometimes we'll have a joint ticket related to the event.

How many staff are included on the payroll?

One seasonal part-time administrator. All other functions performed by volunteers.

What are the average annual operational costs of the museum?

\$60,000 +/-

Are there any important operational efficiencies you want to share?

We have a strong partnership with the City of Kingston. We are a private non-profit corp, but the property is leased from the City. Most major capital improvements are administered by the City.

Are there any funding sources that support the operational costs?

Not usually. We find that operational grants are hard to come by.

Were there funding sources or grants that assisted with initial capital costs of the museum construction / renovations?

Capital projects we've done quite well lately. In the last 5 years we've benefitted from \$1.5M in government support for capital projects, including track rehab, new parking lot, building upgrade, erosion repairs. Sources have included New York Department of State, Environmental Protection Fund, federal earmark.

Governance Structure

What is the nature of the governance structure?

Non-profit educational corp. Self-perpetuating board of trustees (i.e., general membership has no voting rights).

What are the details of this structure? What are the pros and cons?

Board of trustees governed by constitution and by-laws. Pros: small governing body can be 'nimble' reacting to change. Cons: small size can stagnate with no new blood for long

periods of time.

Partnerships

Is there a core of volunteers that assist with operations and / or governance?

Critical to our existence. It wasn't until 4 years ago we had our first-ever paid employee.

Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)?

No. Generally a mix of blue and white collar backgrounds. No major rail employer in area.

What is the health of this volunteer group (is it growing, declining, stable)?

Stable, but at too low a level!

Are there strategic corporate partnerships? If so, what is the nature of their support (e.g., gifts-in-kind, volunteers, special events/exhibits, monetary support)?

We participate in matching grant programs from all major employers. We'd love to have more partnerships, but no large business in this small city. We are trying to get the small business owners along the waterfront to become more of a stakeholder in the museum's future.

Key Lessons

Are there any key lessons that would be important for an application in Atlanta?

From your abstract I can't tell if your museum is intended to be a government institution or a private organization. That's a significant distinction. If tied to the government, you are at the mercy of potentially huge swings in the budget. Non-essential areas are always subject to cut. But if Atlanta already has a sizeable and healthy municipal museum institution, then making the trolley museum part of it might make sense. If you will be a private non-profit, then you should develop a business plan.

Anything else you would like to share?

TMNY is both one of the older and one of the smaller trolley museums. We've had our share of failure and false starts in our 55-year history, but due to a small core of dedicated volunteers have always somehow prevailed. I'd like to think our web site,

HYPERLINK "<http://www.TMNY.org>"

www.TMNY.org

, is better than average for a museum as small as we are and I encourage you to browse it for more information. I would be happy to make our governance documents available to you if you are interested, though we do have a total rewrite of our by-laws in progress at this time since the existing by-laws are 30+ years old.

STREETCAR MUSEUM QUESTIONNAIRE-National Capital Trolley Museum

Location Overview

Where is the museum located (e.g., urban, suburbs)? NCTM is in Northwest Branch Park of the Maryland-National Park and Planning Commission, Montgomery County, Maryland. The area around the Park is suburban.

Is there historical significance to the location? Does it correlate to the "streetcar" theme? No; however, there is a long-range plan to develop the Park with picnic shelters designed as trolley waiting stations of the early 20th century.

Are there any surrounding amenities that also create a draw to the location? Not yet.

Are there other facilities co-located at the site (e.g., maintenance facility)? No

Physical Attributes

What type of facility is the museum located in? Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)? The Museum designed its facility so as few as three staff could operate it; a dispatcher, a streetcar operator, and a cashier. The primary exhibit, the one-mile demonstration railway, and an exhibit of street railway track with conduit slot are outside. Other exhibits are inside.

What is the size of the museum in sq. ft.? Indoor space? 17,000 square feet Outdoor space?

Several acres

What is included in the museum facility (restrooms, offices, etc.)? The visitor center includes: 1) reception, Museum Shop, and restrooms; 2) Classroom/ staff break area; 3) Auditorium – 60 seats; 4) Main Hall; 5) Conduit Hall; 6) Street Car Hall; 7) library/archives; plus 8) offices and board room. A street car maintenance facility includes: 1) a carhouse with maintenance pit and 2) an enclosed yard with wood shop, oil house, mower house, and parts storage containers.

What components / exhibits / artifacts are included on the museum grounds? Main Hall features the permanent exhibits, Street Car Communities, Rock Creek Railway Company (and O gauge model), and Street Cars Go to the Movies. Conduit Hall includes the permanent exhibits, The Conduit Story and Trolley Power.

Are there rotating exhibits, if so please describe? The wall along the outside of the auditorium is dedicated to rotating exhibits. Currently, there are four: Promoting Transit, Trolleyman at Work (late August to early September), Homefront Street Cars (late May to early June), and Jim Crow on Streetcars (February). The selection of cars exhibited in Street Car Hall and of the cars operated on the railway also changes.

Operational Summary

What is the average annual attendance at the museum? Museum attendance is recovering from the closure of the Museum for fourteen months during relocation (2008 to 2009). The Museum also suffered a major fire in 2003. So when visitors finally find the Museum, they may say that they thought the Museum was buried under the new highway or had burned completely. The near-term goal is 20,000; last year's attendance was 12,000.

What are ticket prices? Are there membership tickets, if so what is the price? Admission including car fares is \$7.00 (ages 18 to 64) and \$5.00 (ages 2-17 and 65+). Museum members are admitted free.

What are major sources of annual revenue and what is there general percentage of overall revenues (i.e., gate admission (43%), gift shop (19%), pavilion rental (9%), educational tours (9%), and special events (5%)? Gate is 65%; Museum Shop is 25%; Facility Rental is 6%; Unrestricted donations are 4% of the operating budget.

Are there special events? If so, what kind? What is the associate ticket price? Are there attendance spikes for these events, if so explain. Yes, there are special events to boost attendance, but regular admission applies.

How many staff are included on the payroll? A part-time educator and a Museum Shop cashier are on the payroll.

What are the average annual operational costs of the museum? \$99,000

Are there any important operational efficiencies you want to share?

Are there any funding sources that support the operational costs? No

Were there funding sources or grants that assisted with initial capital costs of the museum construction / renovations? Maryland bonds bills, TEA-21 funds, Montgomery County capital

improvement funds, State Highway Administration mitigation funds, and private donations

Governance Structure

What is the nature of the governance structure? Please see the Museum's website section,

About the Museum, for governance and strategic planning.

What are the details of this structure? What are the pros and cons?

Partnerships

Is there a core of volunteers that assist with operations and / or governance? Yes

Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)? While many would think the volunteers are dedicated trolley fans, they really come from many backgrounds to interpret history, to participate in restoration/maintenance, or to give back to society.

What is the health of this volunteer group (is it growing, declining, stable)? Always too small, but curiously stable over forty years

Are there strategic corporate partnerships? If so, what is the nature of their support (e.g., gifts-in-kind, volunteers, special events/exhibits, monetary support)? Corporate partnerships are to be developed.

Key Lessons

Are there any key lessons that would be important for an application in Atlanta? Too little information from your end to address "an application in Atlanta."

Anything else you would like to share?

STREETCAR MUSEUM QUESTIONNAIRE-San Francisco

Location Overview

Where is the museum located (e.g., urban, suburbs)? City of San Francisco, CA.

Is there historical significance to the location? Yes, operates on Market St – main thorough fare and extends to Fisherman's Wharf, two extensions planned

Does it correlate to the “streetcar” theme? Operates vintage PCC, Milan & Historic cars (all built prior to 1952)

Are there any surrounding amenities that also create a draw to the location? Yes

Are there other facilities co-located at the site (e.g., maintenance facility)? Maintenance is done at another location within city proper

Physical Attributes

What type of facility is the museum located in? Urban setting for streetcars

Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)?

The Market St Railway (volunteer group) has indoor museum

What is the size of the museum in sq. ft.? Indoor space? Approx. 650 sq ft. Outdoor space?

What is included in the museum facility (restrooms, offices, etc.)? Offices off site, but within city proper

What components / exhibits / artifacts are included on the museum grounds? Photos, small exhibits, interactive media, display of car front

Are there rotating exhibits, if so please describe? Yes, deals with city events + culture like earthquake, ball parks....,

Operational Summary

What is the average annual attendance at the museum? Approx. 20 thousand ride cars each day

What are ticket prices? \$2.00 for 2 hours Are there membership tickets, if so what is the price?

What are major sources of annual revenue and what is there general percentage of overall revenues (i.e., gate admission (43%), gift shop (19%), pavilion rental (9%), educational tours (9%), and special events (5%)?

Are there special events? If so, what kind? What is the associate ticket price? Are there attendance spikes for these events, if so explain. City held events

How many staff are included on the payroll? MUNI CCSF – 35 key support staff, MSRY. museum 3

What are the average annual operational costs of the museum?

Are there any important operational efficiencies you want to share?

Are there any funding sources that support the operational costs?

Were there funding sources or grants that assisted with initial capital costs of the museum construction / renovations? City, state and fed money for vehicles

Governance Structure

What is the nature of the governance structure? CCSF, Ca. PUC, Fed.

What are the details of this structure? What are the pros and cons?

Partnerships

Is there a core of volunteers that assist with operations and / or governance? Yes

Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)? Some

retired city staff, some from other private agencies

What is the health of this volunteer group (is it growing, declining, stable)? Stable in some areas, declining in others

Are there strategic corporate partnerships? If so, what is the nature of their support (e.g., gifts-in-kind, volunteers, special events/exhibits, monetary support)?

Key Lessons

Are there any key lessons that would be important for an application in Atlanta?

Anything else you would like to share? The “F” line is a part of the city (SFMTA) transit services. The service began in earnest in 1995, but had several summer only service dating back to the 1980s. The “F” line operates 20 hours a day, seven days a week and provides service 20 older (pre- 1952) cars in service each day. The SFMTA also provides light rail service on 5 other lines with modern light rail cars, plus cable cars, trolley bus and bus routes. The F line also co-mingles with Modern Light rail transit services on one route on a daily basis. The F line provides both commuter and tourist service seven days a week. Depending on the nature of the questions we may be able to assist in the city environment. SFMTA also partners with the Market St Railway. They are a mostly volunteer group, but do have paid staff in the Museums store/museum.

STREETCAR MUSEUM QUESTIONNAIRE-Seashore Museum

Location Overview

Where is the museum located (e.g., urban, suburbs)? Suburbs

Is there historical significance to the location? Does it correlate to the “streetcar” theme?

Located on the right of way of a former interurban trolley line.

Are there any surrounding amenities that also create a draw to the location? Kennebunkport is an internationally known destination for beaches and shopping.

Are there other facilities co-located at the site (e.g., maintenance facility)?

All museum activities are carried out at the site: Interpretation through static indoor exhibits, cars stored inside, operation of cars for the public, restoration and maintenance of the cars, and library activities.

Physical Attributes

What type of facility is the museum located in? Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)? It is located on 330 acres of land and consists of a campus of buildings to carry out the tasks listed above plus the 1.5 mile line on which we give rides.

What is the size of the museum in sq. ft.? Indoor space? Outdoor space? No idea what the square footage is. There are 5 carhouse buildings, a large restoration shop, a parts warehouse, a large visitors center, plus the 330 acres mentioned above.

What is included in the museum facility (restrooms, offices, etc.)? It seems that you're asking this question from the perspective of something like a traditional art museum where everything is in one building. As you can see from the above that's not the case.

What components / exhibits / artifacts are included on the museum grounds? There are in excess of 200 vehicles, comprising horsecars, cable cars, electric streetcars, interurban cars, subway and elevated trains, trackless trolleys, and buses. There are also two historic copper clad buildings (one a switching tower, the other a station) from Boston's former elevated railway.

Are there rotating exhibits, if so please describe? Cars in operation change regularly. Traditional exhibits change less frequently.

Operational Summary

What is the average annual attendance at the museum? Around 20,000

What are ticket prices? Are there membership tickets, if so what is the price? See

HYPERLINK "<http://www.trolleymuseum.org/visit/admission.php>"

<http://www.trolleymuseum.org/visit/admission.php>

and

HYPERLINK "<http://www.trolleymuseum.org/getinvolved/membership.php>"

<http://www.trolleymuseum.org/getinvolved/membership.php>

What are major sources of annual revenue and what is there general percentage of overall revenues (i.e., gate admission (43%), gift shop (19%), pavilion rental (9%), educational tours (9%), and special events (5%)? Admissions around 13%, Membership dues 5%, Museum Store sales 19%, Donations and Grants 54%, Investments 6%, Miscellaneous 2%. These numbers vary from year to year but this is representative.

Are there special events? If so, what kind? What is the associate ticket price? Are there attendance spikes for these events, if so explain. Special events include Halloween themed events, Christmas themed events, events targeted at enthusiasts of one type of equipment or another or from a given region. The prices vary as appropriate to the size and duration of the event. Of course there are attendance spikes otherwise we wouldn't hold the events! See the website for more.

How many staff are included on the payroll? Around 10.

What are the average annual operational costs of the museum? Typically \$750,000 to \$1,000,000

Are there any important operational efficiencies you want to share? Can't think of any.

Are there any funding sources that support the operational costs? Admissions and store sales supplemented by an annual fund drive among membership.

Were there funding sources or grants that assisted with initial capital costs of the museum construction / renovations? Initial capital cost (1939 to 1960s) was born by the museum membership.

Governance Structure

What is the nature of the governance structure? 12 person board of trustees elected by donors, with vote weights based on cumulative contributions

What are the details of this structure? What are the pros and cons? Beyond the scope of what can be answered here easily.

Partnerships

Is there a core of volunteers that assist with operations and / or governance? Largely a volunteer organization

Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)? Come from all walks of life

What is the health of this volunteer group (is it growing, declining, stable)? Getting older, key issue as with all other such museums is attracting new younger people.

Are there strategic corporate partnerships? If so, what is the nature of their support (e.g.,

gifts-in-kind, volunteers, special events/exhibits, monetary support)? No.

Key Lessons

Are there any key lessons that would be important for an application in Atlanta? Build an endowment to support operating expenses.

Anything else you would like to share?

STREETCAR MUSEUM QUESTIONNAIRE --Minnesota Streetcar Museum

I. Location Overview

1) Where is the museum located (e.g., urban, suburbs)?

Our Museum has two railways. The Como-Harriet Streetcar Line (CHSL) runs in an urban setting in a Minneapolis city park on one mile of electrified track. CHSL operates on private right-of-way (former Twin City Rapid Transit Co. [TCRT] streetcar line). The other line is the Excelsior Streetcar Line (ESL) that operates in an urban setting on private ROW (former railroad line) on a half-mile of electrified track. Excelsior is a small suburban town located about 15 miles west of Minneapolis.

2) Is there historical significance to the location? Does it correlate to the “streetcar” theme?

The CHSL runs on a former TCRT streetcar right-of-way (ROW). One of the lines that operated on the ROW (amongst several others) was TCRT’s Como-Harriet line, the last TCRT line to close on June 18, 1954. CHSL was the longest line on TCRT—21 miles from downtown St. Paul through downtown Minneapolis ending in southwest Minneapolis.

The ESL runs on a former Minneapolis & St. Louis RR abandoned roadbed through the

south edge of Excelsior. Most of the original high-speed streetcar ROW from Minneapolis to Excelsior was converted to streets and roads when the line was abandoned in 1932.

3) Are there any surrounding amenities that also create a draw to the location?

CHSL operates in a city park in Minneapolis’ “Chain of Lakes” section of the city’s worldrenown

park system. The chain of lakes extended park draws maybe 3-4 million

visitors during a typical year. ESL operates in the charming suburban town of Excelsior

that is on the south shore of popular Lake Minnetonka. Excelsior has a good mix of retail stores, antique stores and smaller restaurants. Excelsior also is home to the

Museum of Lake Minnetonka which restored and operates the historic streetcarsteamboat

Minnehaha. The Minnehaha was built by TCRT in 1906 in their shop and

operated on Lake Minnetonka from 1906 until 1926 at which time the lake service was ended and the boat was scuttled in the lake. The boat was raised from the lake bottom in 1980 and restoration was finished in the mid-1990s.

4) Are there other facilities co-located at the site (e.g., maintenance facility)?

Both railways have buildings in which our five operating streetcars are stored and maintained. Both lines have a shop section for repairs to our operating streetcars. ESL’s shop bay doubles as our Museum’s primary restoration shop where we restore historic streetcar bodies to full operation. Our Museum’s history reveals that we restore a streetcar roughly every 6-10 years, depending on the magnitude of the restoration, i.e., how bad-off the original carbody was.

II. Physical Attributes

1) What type of facility is the museum located in? Is it an entirely indoor facility or are there exhibits outside of the main structure (if applicable)?

Our museum is an open-air living history museum. We do not have a formal museum building in the sense that most people equate with a “museum.” Our museum is our historic rights-of-way and our authentic and historic operating Minnesota streetcars. Other than the storage buildings where our streetcars are housed and maintained, the only other building we own is a small depot at CHSL. This building houses our token sales counter and gift shop. The depot walls contain built-in display cases containing photos and smaller artifacts interpreting the streetcar era in the Twin Cities.

2) What is the size of the museum in sq. ft.? Indoor space? Outdoor space?

See above. The depot at CHSL is approximately 15’ X 20’ and is a recreation of the one that stood on the same site from 1900 until 1914. It is a combination gift shop, token sales counter with historic wall displays. CHSL’s car barn can house four 45-foot streetcars with work space in the shop area. ESL’s car barn is also capable of housing four 45-foot streetcars, including the storage and work space in the shop area. As mentioned previously, CHSL has one-mile of electrified track and ESL has one-half mile of electrified track. Our track is standard gauge as was TCRT.

3) What is included in the museum facility (restrooms, offices, etc.)?

CHSL in Minneapolis does not have restrooms on site but there are restrooms in a public facility about 200 feet to the east. ESL has restrooms in the car barn that are available to the public, as part of the ride at ESL includes a tour of the interior of the car barn which houses two other streetcars and has historic displays. Our Museum has no dedicated office space although we do have plans to build an office at our CHSL

carbarn when funds become available to pay for the expansion. This is around 3-4 years in the future.

4) What components / exhibits / artifacts are included on the museum grounds?

See above responses. Our main artifacts are our five operating historic Minnesota streetcars. We also own three streetcar bodies, one of which is undergoing complete restoration at our Excelsior shop.

5) Are there rotating exhibits, if so please describe?

We attempt to operate our streetcars on a rotating schedule to provide variety to both our passengers/customers and for our operating personnel. This is true at both railways. Static displays at both railways pretty much stay the same although our archivist periodically freshens them up usually at the beginning of the season (i.e., first weekend in May).

III. Operational Summary

1) What is the average annual attendance at the museum?

CHSL – 35,000 ESL – 6,000

2) What are ticket prices? Are there membership tickets, if so what is the price?

Standard fare for a 15-20 minute ride at both railways is \$2.00 for anyone four years of age and older. We do not offer senior or retired discounts. We also sell 10-ride, 25-ride, and all-season family passes at a small per-ride discount. Members who join our Museum get unlimited rides on both railways. Member dues are \$30 for an individual, \$45 for a household, \$500 for lifetime membership. A half-hour streetcar charter costs \$75 for non-member, \$55 for a member.

3) What are major sources of annual revenue and what is the general percentage of overall

APPENDIX 3: MUSEUM Q&A FULL DATA

revenues (i.e., gate admission (43%), gift shop (19%), pavilion rental (9%), educational tours (9%), and special events (5%))?

Streetcar rides – 34%

Season passes, charters & special events – 15%

Merchandise sales – 13%

Donations/grants – 32%

Member's dues – 8%

4) Are there special events? If so, what kind? What is the associated ticket price? Are there attendance spikes for these events, if so explain.

We operate the following special events: PJ Trolley/Storybook Trolley; pumpkin patch trolley; Halloween ghost trolley; and, Santa Claus trolley. We also operate a murder mystery trolley and a summer trolley camp (one-day event) for youngsters at CHSL. We are going to reprise our “moonlight trolley” (ride is after dark when we normally do not operate) this year after a 2 year hiatus. All of these are extra-fare events with the fares charged varying depending on the event. Special events account for around 25% to 30% of farebox revenues, which is remarkable considering that about ten days of operations yields around 25-30% in farebox revenue.

5) How many staff are included on the payroll?

We do not have any paid employees. We are all volunteers.

6) What are the average annual operational costs of the museum?

CHSL -- \$29,800 ESL -- \$19,400 Museum Admin/Overhead -- \$16,300

7) Are there any important operational efficiencies you want to share?

None that come to mind. Being all-volunteer certainly helps the bottom line. Having

even one paid employee would be a financial drain for us, not to mention the complications associated with payroll withholding, retirement funds and such.

8) Are there any funding sources that support the operational costs?

Our farebox revenues, including revenues from special events, charters, etc., pay for our direct operating expenses, e.g., electricity, insurance, maintenance, etc..

9) Were there funding sources or grants that assisted with initial capital costs of the museum construction/renovations?

We have been fortunate over the years to successfully tap into the federal ISTEA/TEA-21 grant programs to expand our car barn streetcar storage buildings several times and to rebuild our one mile of track at CHSL. The entire Excelsior Streetcar Line and associated car barn structure was also built using federal ISTEA funds.

IV. Governance Structure

1) What is the nature of the governance structure?

Our Museum is governed by an 8-member Board of Directors. The Museum is managed by several supervisors/managers led by the General Superintendent. If you wish, I can send to you our organization chart or you can look at it on our website.

2) What are the details of this structure? What are the pros and cons?

See previous response. Not sure how to answer the “pros and cons” question. Our organizational structure seems to work well for us. One problem we do have is finding volunteers willing to fill some of the management positions.

V. Partnerships

1) Is there a core of volunteers that assist with operations and/or governance?

We are an all-volunteer organization with slightly over 300 dues-paying members. Our

Operating Department has approximately 90 active volunteers. There are approximately 15 non-operating volunteers working on shop and outside physical plant projects, e.g., repairing/maintaining track and overhead trolley wire. Many of these volunteers also do double-duty by working on non-operating areas such as shop repairs and restoration, management positions, Board of Directors, etc.

2) Is there a general profile of these volunteers (e.g., former Norfolk Southern employees)? There is no one identifiable source for our volunteers. They come from all walks of life and professions. The majority of our volunteers are not a traditional “railfan.” Of the approximately 110 active volunteers we have, probably 20% to 25% are retired.

3) What is the health of this volunteer group (is it growing, declining, stable)?

The age of our volunteers is an issue for our organization as it is for virtually all similar volunteer transit or railroad Museums. We recruit new operating personnel each year to attempt to fill the gaps as volunteers drop out, move away, etc. Our older volunteers eventually retire from active volunteering or get to the point where they can no longer contribute. Over the last few years we’ve been fortunate to recruit about a half-dozen very active retired men to work on various projects in our shops, including our on-going restoration of a rare streetcar.

4) Are there strategic corporate partnerships? If so, what is the nature of their support (e.g., gifts-in-kind, volunteers, special events/exhibits, monetary support)?

We do not have any direct partnerships with corporations, although we would like to.

VI. Key Lessons

1) Are there any key lessons that would be important for an application in Atlanta?

This question is too open-ended to give an adequate response on a questionnaire such

APPENDIX 3: MUSEUM Q&A FULL DATA

as this. It's hard to give lessons learned or make recommendations here as I am not very familiar with the proposed Atlanta operation. I'm not entirely sure how our allvolunteer Museum's experiences or lessons learned will help the Atlanta operation and Museum.

2) Anything else you would like to share?

Please call me with questions, comments, etc. I'll do my best to help you out in any way possible.

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A4: Recommended Best Practices White Paper



Recommended Practices for Railway Museums

An Initiative of the Association of Railway Museums
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Adopted August 1997

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The text of this document may be reprinted in whole or in part provided credit is given the proper source:
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A Note of Thanks

These Recommended Practices for Railway Museums represent the summation of many months' worth of selfless effort on the part of numerous individuals representing ARM member institutions in both the United States and Canada. A Recommended Practices Working Group convened several times in Washington, D.C., thanks to the availability of meeting facilities there graciously provided by National Public Radio, and other meetings took place elsewhere as well.

The Working Group's membership remained fluid, and numerous helpful comments and suggestions were received from far and wide in connection with each of eight succeeding drafts that were circulated leading up to the final document. A complete listing of those who assisted in the process is therefore simply not possible here, but several persons and one association in particular deserve mention:

Jim Schantz of the Seashore Trolley Museum, for drafting much of the initial copy from which the final document evolved; the Western Region Committee of the Canadian Council for Railway Heritage, for providing the initial wording from which this document's Ethics section was adapted; Wayne Schmidt of St. Louis' Museum of Transportation, for duplicating and distributing copies of each successive working draft; Brian Norden of the Orange Empire Railway Museum, for taking on printing and distribution to the entire ARM membership of Draft Version 5 and this final adopted version; Paul Hammond, former editor of *Locomotive & Railway Preservation* magazine, for gathering, reviewing, and incorporating as appropriate a host of sometimes contradictory suggestions into each succeeding draft, plus editing and formatting these and the final document for publication; and finally, ARM President Scott Becker, for his tireless advocacy of the process leading up to this document's adoption, and also his work in procuring the grant for its printing.

The Association of Railway Museums is deeply indebted to all who took part in this document's thoughtful production.

Preamble

Railway museums represent a diverse mix of organizations and institutions that traditionally have been driven by several primary forces:

- The tremendous interest shared by numerous individuals in the main line and urban railways of North America, and the significant impacts of these railways on their lives, particularly in times past
- The realization that failure to acquire many railroad artifacts in a timely manner would result in their immediate, deliberate destruction
- The fact that other museums and historical societies were unable to preserve and interpret these fields in a comprehensive way
- The evolution of a committed, volunteer movement which fulfilled the need to preserve the memory and history of this fundamental developmental force in North America's heritage

The railway preservation movement began almost entirely with concerted volunteer efforts and some corporate or civic attempts to preserve and secure for posterity the artifacts, documents, equipment, and structures of this railway heritage. These pioneering efforts have nurtured the public memory of railway transportation history, and institutionalized the preservation of its many physical reminders. As caretakers of history, the resulting organizations have attempted—through a variety of static and operating venues—to present their collections and materials to a diverse and broad-based audience throughout North America.

The stewardship and trust practiced by dedicated volunteers and emerging institutions during these early years have formed a foundation upon which to build, and provided a large body of knowledge. Today, these institutions wish to share this knowledge with the visiting public, with other railway heritage preservation institutions, and with the museum field.

The railway heritage preservation field is now in transition, from inward-oriented preservation organizations to outward-oriented educational and public service institutions that recognize a responsibility to hold their collections in the public trust. Recommended Practices for Railway Museums is a document intended to help guide this transition.

Use of This Guide

The Association of Railway Museums has formulated these Recommended Practices to serve as a self-help guide for institutional growth and development. As with any comprehensive document, not all parts apply to or affect all institutions. Recommended Practices for Railway Museums identifies the unique characteristics of railway museums and integrates these characteristics with practices that are today standard in the broader museum field. Its goals are:

1. To serve as an educational tool for railway preservation and interpretive efforts, and to communicate the expectations commonly accepted in the field.
2. To function as a guide and to provide a framework for existing museums and organizations as they strive to achieve higher levels of professionalism.
3. To serve as a benchmark for railway museums seeking accreditation from the American Association of Museums (AAM), the Canadian Museums Association (CMA), and others. By keeping the unique concerns of the railway preservation community foremost, Recommended Practices for Railway Museums will be a guide by which visiting accreditation committees can evaluate levels of professionalism at each institution.
4. To define and emphasize the railway museum community's commitment to holding its collections in the public trust, ensuring the long-term care of the historic objects entrusted to its protection.
5. To demonstrate to a public audience and to the museum field each institution's commitment to serving and educating the public through a variety of means, including effective interpretation techniques.
6. To help ARM member institutions increase the effectiveness of their fundraising and development efforts through demonstration—to the public and potential donors—of their commitment, not only to collections care and interpretation but also to professional management practices and community involvement.

Organized railway preservation began as a series of grass-roots efforts by individuals, communities, and corporate leaders. Professionalism levels therefore must evolve, increasing as each institution matures and develops additional resources.

Limited resources may necessarily preclude or delay adoption of some of the initiatives recommended in this document. Nevertheless, the Association believes that member organizations should review these Recommended Practices, and establish eventual achievement of the recommendations as an institutional goal.

The Association recognizes that the Recommended Practices are part of an evolving document, and welcomes comments and suggestions.

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1. Institutional Purposes

Railway museums need a clearly stated purpose, giving them a reason to exist and providing a means from which to set their direction.

- 1.1 Museums are not-for-profit institutions that collect and preserve artifacts and related documents in the public interest
 - a. Holding collections in public trust, museums strive to conserve these items in the most responsible manner possible, and to display, demonstrate, and interpret them in ways that educate and enlighten people
 - b. In order to convey the idea that railroads and street railways existed to provide a system of transportation, railway museums also often preserve and interpret skills, crafts, and processes, not just objects. They may choose to operate parts of their collections for the visitor by providing experiences such as rides aboard authentic rail vehicles
- 1.2 Each institution must clearly establish its purposes through adoption of a Mission Statement that articulates the museum's broad institutional goals and objectives as they relate to the acquisition, preservation, care, and use of items collected in the public interest. Items to be addressed would typically include
 - a. What kinds of things a museum will collect, limited in terms of types of artifacts and documents (*e.g.*, rail equipment, ephemera, or photographs), technologies, or other subgroupings (*e.g.*, interurban electric or main/short line railroading), geographical areas, and time periods
 - b. How these tangible items will be used for the public good, in terms of such things as displays, demonstrations, programming, and scholarly access
- 1.3 In order to assure continued validity of institutional goals and their relevance to public involvement and interest, railway museums should conduct periodic or ongoing reassessment

2. Governance

The governing authority protects and enhances the museum's collections and programs and monitors its physical, human, and financial resources. It ensures that all these instruments and resources support the museum's mission.

- 2.1 Museum governance must be in conformance with museum community and governmental policies, ethical standards, and regulations. Governing authority members must
 - a. be aware of their fiduciary, legal, and ethical responsibilities as trustees of collections held in the public trust
 - b. ensure that all those who work for or on behalf of a museum understand and support its mission and public trust responsibilities
 - c. understand and fulfill their trusteeship duties, acting corporately rather than as individuals
 - d. ensure that a formal mechanism (*e.g.*, a code of conduct) exists to disseminate standards and expectations regarding working relationships among trustees, employees, and volunteers, based on equity and mutual respect
 - e. 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
- 2.2 As most railway museums depend on a high level of volunteer staffing and management, and have traditionally been financed largely by grassroots support from many small donors directly interested and involved in museum activities, museum boards often include heavy participation or even control by member/volunteer staff members. Governing authorities
 - a. must understand that the demands and concerns posed by holding differing and potentially conflicting roles within an organization (*e.g.*, governing authority member and department head) pose added challenges for those affected to act responsibly and ethically
 - b. must consider that management involvement by dedicated staffers can be both a strength, in terms of commitment to a museum, as well as a possible source of insular or myopic thinking, factors which must be weighed carefully
 - c. should ensure that new candidates are encouraged in the processes by which individuals are selected or nominated for the governing authority. Consideration should be given to nominating candidates based on a diversity of qualifications such as objectivity, business and/or management background, leadership abilities, and other appropriate abilities or skills. Levels of popularity with other members, degree of organizational participation, or accumulated volunteer service hours should not be the primary criteria in such processes
 - d. are encouraged to formulate policies and plans for broadening their organization's community representation and participation, either in terms of adding members of the community-at-large to the board itself, or by involving such community representatives in advisory or review capacities
 - e. are encouraged to think broadly and make decisions for the good of the institution, not just to advance ideas, improvements, or programs that fall within the areas of their greatest personal interest

3. Staff Structure and Evolution

Railway museums, historically heavily dependent on volunteer labor, should consider how they might enhance or even alter the makeup and organization of their staffs in order to better direct the pursuit of institutional goals and professionalism.

- 3.1 Many railway museums are primarily and heavily dependent on volunteer labor at all levels in their organizations. Full and part-time volunteers often fill the required staff positions and learn through experience and exposure to the field. The cultural transition from an enthusiast orientation to one embodying accepted museum field of public service and education evolves through effective management and oversight, enfranchising and motivating both paid and volunteer staff members. Characteristic aspects of railway museums affect the path to professionalism, and the following are to be considered:
 - a. The primacy of safety and compliance with regulatory requirements means expertise in railway operations and related issues may be equally as important as training or experience in educational programming and museum curation. Nevertheless, railway museums are expected to provide opportunities for paid and volunteer staff to participate in professional museum development seminars and workshops in order to develop and improve their competency with such programs and practices.
 - b. While financial constraints of railway museums have often imposed limitations on professional training, institutions should establish staff development and improvement goals, and look for innovative ways of encouraging professional development, networking, and collegial exchanges.
 - c. Some institutions will evolve in directions requiring the engagement of compensated staff to either accomplish institutional missions or manage organizational growth. Such museums should anticipate the impacts of such changes, and develop organizational structures appropriate for the integration of volunteer and paid staff.
- 3.2 Personnel practices established by the governing authority shall be used to supervise both volunteer and paid staff members. The following are to be considered:
 - b. Railway museum staff members, whether paid or volunteer, are often active members of the institution or interested parties who are very dedicated. Wherever reasonably possible, sensitive management techniques should be employed to allow development by such workers of a sense of ownership in their efforts, so long as it is to the organization's benefit
 - c. In similar fashion, financial constraints have often allowed paid employment only at below-market rates. In order to assure a future for such positions, and to retain talented and qualified individuals, museums desiring to fill such positions should also work to identify or develop adequate financial resources to support them
 - c. Funding of staff participation in conferences, seminars and workshops is recommended, as it can reinforce a museum's commitment to developing and improving staff, procedures, and programs, among other benefits.
- 3.3 Railway museum staff typically includes positions in several major categories, with an executive who is responsible to the governing body for overall staff supervision. The number and variety of job types in a museum depends on its size, needs, and resources. Combining and/or dividing positions to suit specialized requirements is encouraged.
 - a. The institution must establish an organizational structure that meets its major major functional needs. Examples of functional areas might include:

- Museum programs management and development
 - Collections management and exhibits development
 - Business management and resource development (fundraising)
 - Railway operations and visitor interaction
 - Facilities maintenance and development
- b. Museum programs, collections management, and exhibits development require staff who have knowledge of the history, philosophy, and ethics of museums; knowledge of the museum's mission; an understanding of the physical and historical nature of objects; good background in various types of history; an understanding of learning development patterns and human interaction skills; and an understanding of other areas of museum expertise with which the individual staff member comes in contact in the regular course of work
- c. Business management, resource development, facilities maintenance and development, and railway operations and visitor interaction require staff who have knowledge of the museum's mission; an understanding of the physical and historical nature of railways; an understanding of appropriate safety practices and procedures; and an understanding of other areas of museum expertise with which the individual staff member comes in contact in the regular course of work.

3.4 The diversity of railway museum audiences and staffs is encouraged and recognized as an essential strength by the museum community. Discrimination on any basis should not be tolerated.

4. Programs and Support Activities

Museums recognize their role as interpreters of history and social change through the display, demonstration, and interpretation of collections.

- 4.1 Interpretive goals must be developed for each museum. Existing or planned collections and resources should be considered in determining these goals, which can be broadly or narrowly focused, and need not be restricted to themes suggestive only of chronological history or to simple statements of fact. These goals might include:
 - a. Demonstrating the impacts of railroads and rail transit on social, political, technological, and economic history
 - b. Relating how the availability of inexpensive rail passenger and freight transportation influenced patterns of agriculture and natural resource development, urban growth, suburban living, and business expansion
 - c. Conveying how innovations in transportation have produced profound and lasting changes to our society
 - d. Demonstrating fundamental engineering concepts such as rolling resistance, inertia, strength of materials, and deflection
 - e. Demonstrating fundamental chemistry concepts such as power generation, fuel transformation, and conversion of chemical energy to mechanical energy
- 4.2 Successful interpretation results from integration of exhibits, demonstrations, and trained interpreters, resulting in vivid and meaningful experiences for each visitor that
 - a. Provide the historical context not offered solely by exhibits, demonstrations, or explanations—the how, when, where, and why
 - b. Go beyond simple factual information and technological detail to explain how the exhibited artifacts changed people's lives
 - c. Help people to challenge “common wisdom” or other widely held views that may be based solely on inaccurate history or lack of competing, scholarly viewpoints
 - d. Are best measured, in terms of success, by the reactions and interest shown by everyday visitors, not just by particular interest groups or enthusiasts
- 4.3 The successful conveyance of information to visitors relies on attention by railway museums to several basic activities, including:
 - a. Differing types of exhibits located throughout the museum. Each must be accompanied by interpretive labeling. Explanatory brochures or audio-visual programs should be used to supplement self-guided tours. Highly visible, simple directional signage should be posted to aid visitors. Tours led or directed by interpreters are strongly encouraged to help supplement these. Examples include:
 - Permanent and temporary exhibits in indoor exhibit space
 - Outdoor exhibits involving artifacts, buildings, and railway infrastructure
 - Displayed vehicles and other artifacts in carhouses/train sheds. Consider especially providing viewing facilities (such as raised platforms) or supervised access, as appropriate, to rail vehicle interiors, not just exteriors
 - Exhibits (perhaps including viewing of actual work-in-progress) of ongoing and appropriate conservation/restoration, tools, and documentation techniques
 - Exhibits inside cars used for interpretation
 - Historic buildings already on-site, or ones relocated to the site, that help by re-creating proper ambience and context, and/or can be utilized as appropriate facilities in which to demonstrate various railroad activities and functions
 - b. Educational programming, which should seek to reach out and involve members of your community and might include:

- Classroom orientations, school field trips, and use of prepared curriculum/study guides by teachers
 - Printed publications, videotapes, and other media materials about the museum, its collections, and associated history
 - Formal classroom courses at the primary, secondary, or college level, perhaps in conjunction with local schools/universities
 - Presentations by scholars, staff, or other interested persons
 - Collecting oral histories from railroad employees, past and present, as well as community residents and related persons
 - Other innovative programming (*e.g.*, summer camps, Elderhostel, and cooperative programs with other institutions or service organizations)
- c. Demonstrating concern for the well-being of visitors physically, intellectually, and emotionally, by
- Keeping public safety, security, and comfort in mind at all times, especially as it relates to museum facilities, demonstration activities, and programs
 - Showing respect for a diversity of opinions and perceptions
 - Ensuring that a lack of knowledge or background in various subjects does not unduly impede enjoyment or learning processes
 - Periodically surveying visitor reactions to interpretive programs, operations, and exhibits, in order to improve their effectiveness for and increase interest among the general public
- 4.4 Re-creation of an authentic railway experience is one of the most powerful teaching tools available to railway museums. It helps in preserving and promulgating crafts, skills, and entire historic railroading environments
- a. The unique atmosphere of railroading and rail transit is something railway museums often choose to conserve, preserve, or re-create—almost as if it were another exhibit. If a museum chooses to interpret a particular atmosphere, it should consider codifying what the desired interpretive goal is and how the following points relate to its mission:
- Fidelity to a given time period
 - Consistency with museum collections and other interpretive goals
 - Completeness of overall atmosphere
 - Accuracy of the effort in terms of architecture, technology, and other displayed items
- b. Each museum has unique interpretive theme possibilities related to its collections, geographical location, proximity to major cities, and/or specific site, facility, or right-of-way history
- c. Actual use of historic rail rights-of-way, passenger and freight handling facilities, and railway mechanical installations for demonstration purposes can be an important means of interpreting these sites
- 4.5 Railway operations can provide a unique interpretive tool for capitalizing on the sights, sounds, and smells of “live” rail vehicles, operating personnel, and the entire railway operating environment
- a. Operating equipment can supplement interpretive use of vehicles in static exhibits
- b. Operations personnel can play a major role in interpretation, thus interpretive training should be considered for inclusion in formal qualifications standards
- c. Use of period-appropriate dress and uniforming is encouraged
- d. Role playing, in which interpreters assume the persona of a rail worker or passenger from a bygone era, is an effective interpretive tool

- e. The difference between a simple ride or visit and an interpretive experience must be understood by staff and communicated to visitors, either implicitly or explicitly
- 4.6 Sampling and measurement of customer (visitor) feedback is a necessary component of any successful museum. In order to develop high levels of attendance and community support for institutional facilities and programs, visitor input must be sought at regular intervals. Based on the responses, museums can decide how to best target their future course while still remaining true to their organizational mission.
- a. Development of a marketing plan should be based on numerous factors, and address visitor reaction to such quantifiables as:
 - Quality and interpretive value of demonstrations and/or operations
 - Relevance of museum demonstrations, exhibits, and programs to visitors' daily lives and experiences
 - Relevance of displays and exhibits to persons without specialized railroad-related knowledge
 - Success or failure of displays, exhibits, and/or programs to properly communicate or interpret the desired messages
- 4.7 Operational training and safety programs protect people, equipment, and artifacts, and help ensure the future for all railway museums. An appropriate allocation of the institution's financial and management resources must be devoted to operational training and safety. These programs include:
- a. Development and use of written operating procedures and rules, consistent with recognized and appropriate railroad, rail transit, and railway museum operating practices
 - b. Formalized training of operating crews, which includes:
 - Periodic verification of physical and mental qualifications of operators, dispatchers, and instructors
 - Formal instruction and written tests to achieve qualification for various levels of service, administered by trained instructors
 - Disciplinary procedures established for handling infractions
 - Maintenance of individual personnel files to record qualification attempts, successful completions, infractions, and any disciplinary actions. These shall be discarded after an appropriate period of time
 - Frequent inspection and reevaluation to ensure quality control
 - Written and taught procedures, developed well in advance of actual need, for handling emergencies
 - c. Development and use of appropriate dispatching mechanisms to ensure safety. These may include the use of radio, phone, or other communications systems to ensure accurate message transmission and receipt, and to provide the ability to summon emergency services in case of need. The use of appropriate traffic control systems (*e.g.*, hand-held batons or automatic signaling systems) can also help to demonstrate technologies developed in the interest of safety
 - d. Development of a formalized system for incident/accident reporting, required in many jurisdictions
 - e. Compliance with applicable governmental regulations relating to rail operations

5. Collections Stewardship

Railway museums, like all museums preserving and utilizing collections, should strive to adopt and follow accepted standards in caring for these collections and assuring their long-term survival.

- 5.1 A comprehensive, written Collections Management Policy must address all aspects of the institution's collections, and relate care and treatment of collections back to the institution's mission.
 1. Written collecting criteria includes:
 - a. What the museum will collect, and why
 - b. How each collection will support the museum's mission
 - c. How each collection and its individual items will be used and cared for (e.g., research, display, operation, education, outreach, etc.)
 2. Categories of collections should be developed, as the artifacts of railway museums are typically grouped into discrete types of related objects that form the basis for evaluating levels of care, utilization, and documentation. These categories may include the following, and can include further subsets:
 - a. Vehicles of all types, i.e., railway, highway, etc.
 - b. Three-dimensional artifacts (large or small items) that are able to support the museum's mission
 - c. Architecture and archeological sites such as buildings, architectural fragments, remains, and historical structures preserved for the express purpose of supporting a museum's educational mission
 - d. Engineering works such as trackwork, ballast, right-of-way, bridges, tunnels, signal systems, overhead wire, and related items
 - e. Documentary collections such as manuscripts, corporate records, timetables, and paper ephemera
 - f. Graphics collections including photographic images, prints, and drawings; engineering documents including prints, tracings, and reproductions; and fine art
 - g. Museum archives including corporate records of the institution, including board minutes, financial records, publicity items, and collections documentation
 - h. Special collections of those objects rare or unique enough to warrant special recognition and care. Includes items that are extremely valuable, associated with important persons or events, or extremely fragile and/or hard to care for
 - i. Storage collections including artifacts or equipment that may have been acquired specifically in order to be saved from destruction. As adequate care may be especially lacking for items in this category, a basic level of caretaking should be established at the outset before such items are accepted. Separate documentation justifying each item's value and relevance to the collection may be desired before accepting additions to this category
 3. Artifact and equipment categories by use may also be developed to reflect the museum's operational needs and the responsibility to preserve the collections for the public and for future generations. For example, as operation of historic rail vehicles is a primary interpretive experience at many railway museums, vehicles are often categorized in terms of their intended use, such as:
 - a. Accepted for display in the permanent collection
 - b. Accepted for operation/use in the permanent collection
 - c. Accepted for trade
 - d. Kept for consumption/disposal
 - e. On short- or long-term loan or lease
 - f. Kept in storage and/or for study

4. A policy must be developed to define the roles and responsibilities of all individuals involved in collections management. This policy recognizes the potential for conflicts with regard to individual versus institutional collecting, and inherent issues of valuation and personal gain. The policy may specify:
 - a. A collections management committee that is responsible for establishment and adoption of policy
 - b. The roles of the Administrator, Curator, Collections Manager, Registrar, and others caring for the collection
5. Acquisition Policies and Procedures
 - a. Objects that are desired for long-term or permanent display should become part of the museum's permanent collection through a formal process of acquisition and accessioning. This process is to follow current accepted standards in the museum field.
 - b. It should be a clearly-stated goal for the institution to own all objects entrusted to its long-term care, even if highly desirable objects are available through lease or loan. Such leases or loans, even if available at minimal or no up-front cost, often divert institutional resources away from museum-owned objects. In extreme instances, such diversion can raise questions of impropriety that could threaten an American museum's 501(c)3 tax-exempt status.
 - c. Objects considered for accessioning are to be evaluated in terms of:
 - Their relationship to the museum's mission
 - Their rarity or typicality, condition, and provenance
 - The museum's capacity to store and ability to conserve the object
 - Whether the object duplicates others already in the collections
 - Whether there are conditions attached to the acquisition
 - Appraisal for insurance, donation documentation, or market value purposes

Object appraisals must be conducted by persons certified in such work (e.g., recognized as such by tax authorities, insurers, and other museums) and having no connections to prospective donors, recipients, or insurance beneficiaries. To avoid potential conflicts of interest regarding object valuations for donor tax credit or insurance purposes, museums should encourage prospective donors to obtain and pay for appraisals beforehand.
 - d. The actual acquisition process should include:
 - A receipt or record for donated objects
 - A bill of sale for purchased objects
 - A document specifying treatment of loaned objects and condition
 - Records that document all decisions regarding each object
 - Application of accepted registration procedures
6. A deaccessioning policy recognizing the museum's trust responsibility is to be developed in advance, for removing items accessioned into the permanent collections. (Note: Objects not accessioned into the museum's permanent collections do not need to go through a formal deaccessioning process.) Whenever possible, and consistent with the museum's fiduciary responsibility, the museum should dispose of deaccessioned objects to other museums, historical organizations, or similar education institutions, and by means of gift, trade, or sale, in that order. The policy addresses:
 - a. Use of funds generated from deaccessionings, restricting such use to acquisition of additional objects or care of museum collections.

- b. The conditions which must be present for deaccessioning to be considered, including such concerns as non-relevance to mission, poor condition, duplication, or lack of authenticity
 - c. Any conditions or restrictions stated in original deed of gift. If possible, the donor of an object should be notified of any deaccessioning decisions made regarding an item he or she has donated, purchased for, or otherwise made available to the museum
 - d. Conditions by which members of the museum, its governing body, or staff must abide in order to receive any deaccessioned object
7. A clearly-articulated access policy must be developed, putting forth criteria for allowing entry or accessibility to museum collections for research and for public use, and criteria for entry or access to restricted areas and/or objects
8. A loan policy must be adopted that defines the conditions under which the museum will loan out objects in its collections and accept loans from other institutions and private individuals, or for non-museum, commercial activities such as television or movie production. This policy addresses:
 - a. Outgoing loans/leases
 - Availability of the object and period of the loan
 - Conditions under which the object will be exhibited, handled, stored, insured, and moved
 - Duration of the loan
 - Fees to be charged
 - Information from the borrowing institution as to its loan procedures and care practices
 - Evidence of insurance and appropriate financial security

Leases to commercial users such as motion picture/television producers should incorporate the best practices developed by ARM members and promulgated at ARM conventions and other gatherings
- b. Incoming Loans
 - Term of loan
 - Specific purpose for loan/furtherance of museum mission
 - Assessment of physical condition, and periodic updates
 - Insurance coverage
 - Provisions for termination
9. Ethics and Regulations

Because there are recognized ethical standards within the museum field, as well as regulations that affect the conduct of collections management, the Collections Management Policy includes a section on ethical practice, addressing the following:

 - a. Allowable uses of any collection object by staff, members, or members of the governing authority
 - b. That presentation of collections is done honestly and objectively to the public, in accordance with the best current information, scholarship, and museum practice
 - c. That all potential conflicts of interest will be avoided—or, if deemed unavoidable, fully disclosed—when dealing with suppliers and staff
 - d. Staff use of museum affiliation to promote personal collecting activities
 - e. Any and all government regulations that may affect collections management or care (*e.g.*, copyright law, trust law, etc.)

5.2 Conservation Practices

1. Railway museums recognize their responsibility to care for *all* the objects entrusted to them, and to have a clearly defined policy for performing those functions that is in keeping with general museum practice.
2. Preservation and conservation practices are codified in a written document that provides guidelines for making responsible preservation, conservation, and restoration decisions for each of the museum's collections. These guidelines provide for:
 - a. Object condition reports
 - b. Procedures to provide short, medium, or long-term stabilization and storage
 - c. An evaluation and justification for the level of each object's use for display, operation, etc.
 - d. A comprehensive restoration plan, developed prior to the initiation of restoration work, that addresses:
 - The extent of restoration proposed for each object, and scope/amount of alterations from present condition that would be necessary
 - Proposed appearance/time period of restoration, including supporting historical and interpretive justification
 - Use, conservation, preservation, or replacement of original fabric
 - Degree of historical accuracy to be achieved
 - e. Use of original versus replica material or objects
 - f. Documentation procedures, including photographs and written notes of all aspects of work performed
 - g. Funding sources and cost estimates
3. Railway museums create categories of objects to determine which objects will be used, which will be stored or given special treatment due to condition, and how all objects in all categories will be used, stored, and cared for.
4. Railway museums must pay particular attention to objects that may be designated for operation. While safe, reliable performance must remain a primary concern, documentation and preservation of original materials, parts, or configuration should be undertaken and samples retained, in keeping with standard museum practice.
5. Restoration and maintenance practices are to be developed that differentiate the type of work performed on an object, based on its classification and use. Restoration serves several different preservation- or operation-related purposes, and is separate from maintenance.

5.3 Spare Parts

1. Because ongoing operation of rail vehicles often depends on replacement parts, railway museums may have many such items on hand, intended for this purpose. These should be treated as maintenance items, rather than objects accessioned into the permanent collection, as their ultimate use is a consumptive one.
2. If duplicates do not exist, or especially if only one does, options such as fabrication of replica parts or entire replica vehicles must be considered. This way, the "last one" can be preserved as "the original."
3. Appropriate storage facilities must be provided for replacement parts inventories, keeping in mind that:
 - These items are not intended for public viewing
 - Their presence, especially in outdoor storage, can communicate unintended and potentially negative messages about an institution's collections care policies
 - Their usefulness to an institution is greatly diminished if they cannot be accessed and inventoried in a comprehensive manner

6. Museum Facilities and Infrastructure

The infrastructure necessary to sustain railway museum storage, exhibit, conservation, and restoration activities is often much greater than that of many other types of museums. Demonstration railway operations add greatly to these infrastructure requirements, especially as safety and security must remain paramount.

- 6.1 Restoration workshops are a unique component of many technology museums, and the restoration and maintenance of rail and road equipment requires heavy machinery of many different types. This equipment is capital intensive, requires specialized training, and requires development of procedures for its proper use to ensure protection of those using the equipment, of the collection, and of the environment.
 - a. Regulatory areas to be recognized and followed in these museum industrial environments include, among others:
 - All national and local safety regulations
 - Workers Compensation, liability, and health insurer requirements
 - Hazardous materials handling and use, including proper observance of procedures such as Material Safety Data Sheets (MSDS)
 - Proper labeling, storage, and disposal of waste materials
 - Proper labeling and handling of hazardous and/or toxic materials
 - b. In addition to training in proper conservation procedures, appropriate restoration/maintenance shops staff members must also be trained in areas such as:
 - Safety awareness and promotion
 - Environmental issues
 - Emergency procedures including CPR and First Aid
- 6.2 Track, signalling, communications, and power distribution systems must be constructed and maintained to safe and suitable standards, as these are essential to safety of personnel and conservation of collections. When adopting standards, institutions should consider:
 - Physical characteristics of rail equipment to be operated (*e.g.*, weight, width, height, wheel profiles)
 - Speed and frequency of operations
 - Local weather conditions and relevant long-term data (*e.g.*, rainfall as it relates to culvert capacity, frequency/severity of lightning storms, etc.)
 - Local utility construction and maintenance standards and requirements
 - Applicable local, regional, and national regulations (*e.g.*, overhead wire height restrictions, grade crossing protection installation and maintenance standards)
 - Availability of adequate staff and financial resources to provide proper and ongoing maintenance and rehabilitationWhenever possible, consideration is given to appropriate period appearances of such systems. Regional variations, specific site history, and historical and/or interpretive relationships between equipment and systems may play important roles in determining appearance and maintenance standards of track, overhead, and related technological support systems.
- 6.3 Security levels at railway museums are dictated by the characteristics of each institution's collections, its site, and its operational environment. Factors to consider include:
 - size of objects and scope of collections
 - fragility and value of collections, artifacts, and equipment
 - surrounding locale (differs greatly for urban vs. rural museums)

An important dimension of security may be taking steps to prevent encroachment of residential development close to operating rail facilities. Purchase of neighboring land as a buffer may be prudent. For large sites, especially rural ones, use of fencing, full property patrolling, and on-site residency should be employed in a manner appropriate to the environment and the museum's experience. Physical security of facilities and collections must remain paramount. In addition:

- Protection from fire, flood, and vandalism must be developed, and provided in a manner appropriate to the site and the museum's resources
- Issues of controlling illegal dumping, hunting, or use by recreational vehicles may be of great importance
- Emergency preparedness planning, including maintaining close relations with local law enforcement, fire authorities, and abutters, is an important component of effective security. Emergency and disaster plans are to be prepared and adopted as appropriate
- Extra attention must be given to operational safety in congested areas, and equipment operations conducted in a manner designed to minimize disruption to neighbors

7. Funding

Railway museum funding should be understood in terms of a variety of sources, both short- and long-term in nature, that can meet a variety of needs, both capital and non-capital. In nearly all cases, museums need to consider raising additional monies to supplement proceeds from admissions, membership, and demonstration rides fees.

7.1 Membership fees, admissions fees, demonstration rides proceeds, and museum store proceeds have historically provided funding for non-capital (operating) expenditures at railway museums. These sources of funding are continuous and ongoing, and this use is considered appropriate by the larger museum community. In the long term, however, these funds in most cases will not be adequate to cover the additional costs of capital improvements and educational programming.

7.2 At times, individual donors or groups of donors, by the size of their gifts or force of their personalities, have directed the priorities of institutions to reflect their personal goals and desires. These donors remain valuable funding sources. However, museums must take charge of actively setting and directing institutional priorities, and developing the necessary resources to achieve them, rather than allowing these priorities to be set and driven solely by donor-directed funding mechanisms.

7.3 Museums must develop funding priorities, expressed in terms of both short-term budgets and long-range fiscal planning, to address the non-capital needs of the institution. These needs include collections conservation and acquisition, exhibits development, and educational programming. Establishment of endowments for maintenance and/or operations is a recommended approach.

7.4 Development of fundraising strategies must be aimed at meeting the needs and goals of the institution rather than simple individual desires or wishes. Partnerships should be developed with the local educational, commercial, and political communities for support and funding. Funding strategies might include annual giving, institutional membership, and planned giving programs

7.5 Commercial and fundraising uses of an institution or its resources must not compromise the institution's mission.

8. Accessibility

Museums must make facilities and operating equipment accessible to all, to the extent this can be done without compromising historical integrity, collections security, and visitor safety).

- 8.1 Museum buildings and facilities must be accessible as defined by state and/or federal law; in the U.S., the Americans with Disabilities Act of 1990 is the relevant document to reference. Specific information is contained in standards set by the American National Standards Institute; such regulations generally exempt historic vehicles if historic quality would be compromised. Historic buildings do not receive a blanket exemption, especially in the case of buildings receiving substantial remodeling or alteration. However, some U.S. states also have historic building codes, which offer alternative solutions to providing accessibility, among other items.
- 8.2 Museums must devote an appropriate portion of their resources to developing strategies that provide for intellectual and/or physical access to collections by all, regardless of ability or disability.

9. Corporate Relations

Railroads are generally commercial pursuits undertaken for shareholder benefit; transit facilities are generally owned by governmental agencies ultimately responsible to the public. In dealing with these and all other business entities, the conduct of railway preservationists at all times must be businesslike and professional.

- 9.1 ARM member museums should strive to promote and maintain positive long-term relationships with all business entities (“companies”) they come in contact with, both public and private and especially including rail operators.
- 9.2 Museum contacts with companies should be channeled through, and limited to, specific museum representatives designated by the institution, who have authority to negotiate on behalf of their institution. Expressions of interest in or requests for equipment or services should be in writing, directed to the proper official within the company. Clearly identified exploratory discussions may be needed for a museum’s governing authority to make a proper decision. Transactions with companies should be ratified by the museum’s governing authority or its designee, which should additionally ensure that the museum’s financing arrangements or other resources permit transactions to be completed without delay.
- 9.3 Inquiries or requests to companies should be supported by a business plan which clearly identifies:
 - a. The equipment or services of interest
 - b. The intended use, presentation, and/or interpretation
 - c. The historic or operational rationale for the request
 - d. Services or assistance requested from the company
 - e. Benefits to the company arising from the transaction
 - f. The museum’s mission, goals, and relevant achievement
 - g. Relevant information regarding the museum’s financing of the transaction
- 9.4 It is unethical for anyone to represent him/herself as the authorized agent of a museum for any purpose whatsoever when such is not the case.
- 9.5 Transactions should be completed in a timely manner. If an unexpected delay occurs, the museum must notify the company of the current status and of subsequent developments.
- 9.6 Museums must promptly acknowledge the cooperation and assistance of companies in an appropriate manner.
- 9.7 Museums must be sensitive to protecting corporate images in the storage, display, and conservation of equipment and artifacts. Subsequent restoration should preserve, present, and interpret in a historically and environmentally responsible manner, and properly respect the company, the profession, the museum, and the community at large. Photographs of restored artifacts, or other appropriate tokens or expressions of gratitude, may be provided to the company in recognition of its assistance. Museums must be particularly sensitive to inappropriate use of corporately identified equipment or objects during commercial use.

- 9.8 Museum personnel may need to obtain written permission from authorized company officials prior to entering the company's property, and must conduct themselves properly and safely at all times while a guest of the company.

Appendices

A. Definition of Terms

Accession: The formal process of creating an immediate, brief, and permanent record of an object for which the museum has title and assigning a unique control number to the object.

Accuracy: The degree to which objects, operations, equipment, practices, etc. represent and/or remain specific to a given time period, geographic region, railroad, locale, and/or architectural or cultural heritage.

Atmosphere: The somewhat intangible aura, 'feel' or 'look' that is structured to enhance the experience a museum is trying to present. The sights, sounds, smells and impressions left with visitors, staff and the general public.

Building (or New Construction): A structure having little or no original fabric or historic relevance to the museum's mission (i.e. a visitor center or shop space).

Civil Engineering: The specific railroad structure that consists of the sub-base, base, ballast, cross ties, rail, overhead, bridges, right-of-way and supporting elements such as signals or grade crossing protection. Overhead is the structure of wire, supporting pieces and energizing equipment utilized on electric railroads.

Specific documentation related to track should include history of construction, evidence of ownership/use, evaluation of historic significance and extent of preservation/restoration to original or period form.

Conservation: Planned management of a collection to prevent deterioration, exploitation, destruction or neglect

Consumption/disposal: A specific class of objects not accessioned into the permanent collection, primarily designed to be used or depleted; as by supplying parts for other equipment, as a pattern for replication, through regular use, or by scrapping to supply funds for other museum needs.

Deaccessioning: The formal museum process of removing an accessioned object from the permanent collections by due process and legal means.

Display: A specific class of objects accessioned into the permanent collection to be used primarily for display, interpretation, and long-term protection in an authentic state. Not intended to be consumed, altered, or worn out through regular use.

Extent: The proportion of original versus replica items or equipment, or the degree of overall 'look' or 'feel' that is to be preserved or re-created.

Fidelity to Period: The degree to which a time period will be adhered to.

Loan/lease: A specific class of objects to which the museum does not hold title. Items may or may not be subject to other museum conservation/preservation practices.

Maintenance: The ongoing systematic work performed on objects, machinery, structures, etc., designed to enable them to continue to reliably perform their intended functions. Maintenance records are kept indefinitely for each object, structure, or other item considered part of a museum's collection.

Operation/use: A specific class of objects accessioned into the permanent collection that are primarily to be used for operation on a regular or semi-regular basis.

Original fabric, machinery, material or appearance may be secondary to safe and reliable function. May be further formally subclassified as a demonstration collection-to be operated heavily, kept in general historical form though materials may be substituted for safety; may include creating replicas or near-replicas for operating use; or equipment designated for limited use to ensure

preservation, yet available for some operation to supplement normal role as static exhibits

Part or Spare Part: An item whose intended use is to replace a similar item in a collection object. A part is not an accessioned item of the collection. Museums should appropriately sort, identify, store, and inventory all parts.

Permanent Collections: The collected, accessioned objects of a museum, acquired and preserved because of their potential value as examples, as reference material, or as objects of aesthetic or educational importance, all relating to the museum's stated purpose. Collections justify a museum's existence.

Preservation: The act of keeping an object intact and safeguarding it from any further changes beyond those which it has already undergone.

Provenance: The origin, source, history, and cultural and historical significance of an object.

Registration: The formal museum practice of creating, controlling and maintaining information about all objects owned by and in the care, custody and control of the museum.

Replica: The use of new or non-historic materials or items to accurately duplicate an original object.

Restoration: The act of returning an existing object to an original appearance and condition through treatments such as cleaning, painting, removing later additions, replacing missing parts, etc. Original fabric or exact reproduction parts, finishes, or materials may be used. All work is based on a specific restoration plan for that object. If an object is restored and intended for operation or demonstration, subsequent work performed to ensure continued use is often not classified as restoration.

Site: An integrated complex of structures, buildings, track, and physical plant (utilities, etc.).

Storage/study: A specific class of objects which the museum has acquired to save from destruction, for future reference, or for some future project, for which the museum does not presently have funds. Written documentation explains the object's historic significance, relevance to the collection, and anticipated use.

Structure: An enclosed or semi-enclosed space that a human is capable of entering, being in or standing on. A structure contains all or part of its original fabric and has a purpose related to the museum's mission.

Time: The specific year or period of years to be re-created.

Trade: A specific class of objects not accessioned into the permanent collection, designed to be sold or traded for the benefit of the museum's permanent collections.

B. Staff Position Definitions:

Archivist: appraises and edits permanent records and historically valuable documents, participates in research activities based on archival materials, and directs or oversees cataloging, retrieval, reproduction, indexing, accession, deaccession, and safekeeping of such materials.

Business manager: is responsible for financial management which may include budgeting; accounting; purchasing; administering personnel procedures, salaries, and benefits; handling contracts; and maintaining endowment, fundraising, and tax records. Museum store and food service managers may assist.

Conservator: coordinates and oversees examination, repair, and conservation of historically significant items such as rail vehicles and smaller artifacts, documents, furnishings, ethnological materials, or textiles. Examines and tests properties of objects to determine condition, need for repair, methods of preservation or restoration, and authenticity, and works with curatorial and facilities maintenance staff to assure use of proper handling, mounting, care, packing, shipping, and storing techniques.

Curator: a railway museum specialist providing management and interpretation for all objects in collections. Makes recommendations for acquisition, deaccession, attribution, and authentication of objects; and publishes the results of research about objects in collections. Archivists, collection managers, conservators, editors, librarians, and registrars may assist.

Development officer: plans, organizes, directs, and coordinates ongoing and special project funding programs. Confers with management and board to determine needs; develops public relations materials; identifies potential supporters and contributors; plans and coordinates special fund drives and benefit events; establishes ongoing support programs; writes and submits grant proposals; provides proper follow-up and contributor recognition.

Educator: develops interpretive exhibits and programs, facilitates public access to objects, and provides docent training. Exhibit designers and curatorial staff may assist.

Executive director: Serves as chief official for overseeing all staff-related activities. Assures understanding of and adherence to directives of governing board; provides input and feedback to board from staff; assists board in establishing organizational vision, personnel policies, and institutional objectives.

General Manager: is responsible for business/railway practices (financial management, membership development, public relations, railway and structures operations) provides conceptual leadership through specialized knowledge of business/railway procedures to facilitate staff activities and execute governing board direction.

Membership officer: fosters membership benefits to attract and retain the interests of a broad museum public by hosting special programs, maintaining membership records, and publishing a newsletter. Editors, educators, business managers may assist.

Museum administrator: responsible for assuring adherence to consistent and professional practices (acquisition, preservation, research, and interpretation) while keeping museum true to its mission. Provides conceptual leadership, through specialized knowledge of museum discipline, to establish policies which facilitate staff activities in keeping with governing board directives.

Public relations officer: promotes the museum by establishing useful relationships between the museum's mission and the perceived needs and interests of its various publics. Museum program staff may assist.

Superintendent of railway equipment shop: implements the recommendations of the curatorial staff with safe and proper procedures in the care and management of railway equipment collections.

Superintendent of railway operations: administers policies for supervising and training operating crews in safe and proper railway practices. Museum program staff and operations instructors may assist.

Superintendent of ways and structures: maintains the buildings, communication systems, grounds, and railway for the safety of people and collections with consideration for their usefulness in interpretation of collections. Museum program and railway operations staff may assist.

—END—



A5: Business Improvement Loan Fund Fact Sheet



BUSINESS IMPROVEMENT LOAN FUND

WHAT IS IT?

The City of Atlanta (the "City") and Atlanta Development Authority (ADA) sponsor the Business Improvement Loan Fund (BILF) Program. The BILF is designed to encourage the revitalization of targeted business districts in the City of Atlanta and to support commercial and industrial development in other eligible areas. Presently, designated Business Improvement Districts include: Auburn Avenue, Bankhead Highway (D.L. Hollowell Parkway), Campbellton Road, Cascade Road, East Atlanta, Empowerment Zone, Georgia Avenue, Heart of Atlanta (including Underground Atlanta), Memorial Drive, MLK/Ashby, Pryor Road, Stewart/Lakewood, Sylvan/Dill, Techwood Park, West End/West View.

Details

Loans can be made for additions and/or improvements to commercial, industrial and mixed-use property; purchase of equipment and fixtures, that are part of the real estate; energy conservation designed to encourage the efficient use of energy resources for commercial, industrial or mixed-use facilities; acquisition of commercial, industrial and mixed-use properties; and inventory and office equipment in targeted Business Improvement Districts.

Two forms of financial assistance are available through the Business Improvement Loan Fund:

Direct Loans: The City may provide a direct loan for an eligible project in targeted Business Improvement Districts if the applicant is unable to obtain a market-rate loan for the financing needed. The maximum loan amount is \$50,000. The interest rate will be determined by the project's cash flow, and the loan must be repaid on a monthly basis (over a term not to exceed seven years). Loan funds (not exceeding \$10,000 per applicant) may be used to acquire inventory and office equipment for eligible applicants located in targeted areas of the city where property renovation is not needed.

Loan Participants: The City may participate in larger loans (usually \$50,000 or more) throughout Community Development Impact Areas (CDIA). Loans may be made to small businesses to assist in meeting local injection requirements for SBA loans. No more than 10% of the total financing for a project can be provided from the Business Improvement Loan Fund. The interest rate will be determined by the project's cash flow, and the repayment may not exceed that of the longest participating lender (maximum 25 years).

The Business Improvement Loan Fund Program is made possible by the City through Community Development Block Grant (CDBG) funds provided by the U.S. Department of Housing and Urban Development (HUD).





A6: Eastside TAD Program Description



THE EASTSIDE TAX ALLOCATION DISTRICT PROGRAM DESCRIPTION

Applications for Eastside TAD funding are currently not being accepted. The Application will be posted on The Atlanta Development Authority website once the application period has commenced.

THE ATLANTA DEVELOPMENT AUTHORITY

The Atlanta Development Authority ("ADA") is a public body corporate and politic and an instrumentality of the City of Atlanta (the "City") created to promote the revitalization and growth of the City. It represents a consolidation of the City's economic and community development efforts in real estate, finance, marketing and employment, for the purpose of providing a focal point for improving Atlanta's neighborhoods and the quality of life for all of its citizens. ADA is the cornerstone of an overall effort to provide economic and redevelopment services in a more effective and efficient manner.

TAX ALLOCATION DISTRICTS

Also known as Tax Increment Financing ("TIF"), Tax Allocation Financing is a redevelopment and financing tool by which governments can provide financial assistance to eligible public and private redevelopment efforts within an officially designated area or tax allocation district ("TAD"). Increases in property tax revenues, which are generated primarily from new investment in the district, are allocated to pay infrastructure costs or certain private development costs within the TAD. This is primarily done through the issuance of Tax Allocation District Bonds.

THE EASTSIDE TAX ALLOCATION DISTRICT

The Eastside TAD, used in combination with the existing Westside TAD, was created to give Downtown Atlanta a powerful tool for promoting the development of new commercial space and in-town housing stock. By providing economic incentives necessary to encourage private and public/private development, the goal is to generate growth in Downtown jobs and residents who are attracted by new, well-designed, high-density housing and key quality-of-life infrastructure investments; the desired result is an attractive, bustling 24-hour Downtown. The Eastside TAD is also intended to spur the revitalization of the historic Auburn Avenue corridor, as well as the densely traveled Memorial Drive/Martin Luther King Jr. Drive corridor and should contribute to the rebuilding of aging public housing projects into economically viable and safe, mixed-income live/work/play communities.

In December, 2003 the City of Atlanta, Fulton County, and the Atlanta School Board passed resolutions creating the Eastside Tax Allocation District and established ADA as the Redevelopment Agent of the City and, in the case of the County and School Board, consenting to the inclusion of their respective portions of ad valorem tax increments created within the District and the application of those tax increments to pay certain qualified redevelopment costs. As Redevelopment Agent, ADA is responsible for promoting positive development within the Eastside TAD and administering the TAD financing process. A map of the Eastside TAD boundaries is attached. The district falls within Neighborhood Planning Units M, N, V and W.

ELIGIBILITY & REQUIREMENTS

A. ELIGIBLE DEVELOPMENTS

TAD funding is available to developments in the Eastside TAD that support the goals and objectives of the Eastside Redevelopment Plan which anticipates the following land uses:

- Office
- Retail
- Mixed-use
- Residential (affordable and market-rate)
- Hospitality
- Cultural
- Entertainment
- Community services
- Parks and open spaces

B. AFFORDABLE HOUSING

Increasing the supply of affordable housing is a major objective for the City of Atlanta. The City has established a goal that a minimum of twenty percent (20%) of new housing units funded from the proceeds of Eastside TAD bond issues be affordable. Not more than half of this minimum requirement can be satisfied by residential construction undertaken by the Atlanta Housing Authority.

C. ATLANTA PUBLIC SCHOOLS

An amount equivalent to five and one-half percent (5.5%) of tax allocation district net bond proceeds shall be made available to the Atlanta Public Schools ("APS") in support of APS' educational reform efforts, its continued infrastructure improvements within the Eastside TAD and for other general educational purposes. Developers benefiting from the Eastside TAD are encouraged to enhance the affordability of housing, thereby improving APS' ability to recruit and retain qualified educators. Developers benefiting from the Eastside TAD are also required to either enter into an educational partnership with APS, or contribute \$25,000 to an education trust fund.

D. KEY POLICY COMPONENTS

- Approved projects must be consistent with goals and objectives of the applicable redevelopment plan(s).
- The optimal use of public dollars will be sought. Projects proposed for inclusion in bond issues and used for bond sizing will be assessed for their economic viability, based in part on current and near term market demand and likely product absorption. Projects based largely on speculative office space, and other high-risk uses, will be less favorably received unless the project would meet a clear public purpose goal.
- We will strive to limit TAD funding to those projects that would not be economically feasible without public subsidy. The existence of a project within a TAD does not automatically entitle the developer to receive TAD proceeds. Bond issues will be sized using projects that are reasonably projected to generate a net increase in the tax base. Projects receiving bond proceeds may include the foregoing, as well as projects contributing to various public purpose goals and infrastructure improvements consistent with the redevelopment plan. The amount of funding granted to a specific project may reflect an allocation of less than 100% of the projected tax increment generated by that project a) in order to address public purpose goals b) based on the assessment of financial need made by ADA and c) other factors as determined by ADA.
- Developer equity, including but not limited to land value and cash at risk, will be invested in the project before TAD funding is made available
- Unless a specific exception is granted by ADA, TAD funding approval should be obtained before start of construction on qualified projects. Unless a specific exception is granted by ADA, TAD funds are disbursed to developers as taxable value is created.

- Developers will use best efforts to comply with the City's Equal Business Opportunity Program¹ with respect to the participation of minority business enterprises, female enterprises, disadvantaged business enterprises and business enterprises located within the City of Atlanta, in all business opportunities which relate to the Project.
- Developer shall comply with the City's First Source Job Policy², with respect to the hiring and training of low-income City of Atlanta residents, as administered by the Atlanta Workforce Development Agency.

EASTSIDE TAD FINANCING PROCESS

The Eastside Tax Allocation District financing process includes, but is not limited to, the following steps:

1. In order to determine eligibility of a project for TAD financing, interested applicants shall:
 - a. Contact ADA to arrange an initial meeting to discuss the viability of your proposed project.
Call:
Amanda Rhein
Senior Project Manager – Tax Allocation Districts
Atlanta Development Authority
(404) 614-8282
 - b. Complete the Eastside TAD Application and package in a 3-ring binder with a complete electronic copy of the Application on a CD with content, tabs, formatting and order of data identical to that of the hard copy Application. One copy of the completed application shall be submitted to The Atlanta Development Authority, accompanied by the non-refundable application fee.

2. Upon receipt of an application, ADA staff will review the application for content and completeness. Incomplete applications will not be processed. (An application will be considered received only when it is complete and the application fee has been paid.) ADA reserves the right to select and employ third party consultants to assist in the analysis and review of the proposed project, its financing and the associated tax increment. The applicant shall pay the cost of such ADA consultants, whether or not the project is constructed.
3. After the application has been reviewed for consistency with City goals, and receives an initial favorable evaluation, ADA staff will convene a meeting of the Eastside TAD Neighborhood Advisory Committee ("Advisory Committee"). The Advisory Committee consists of representation from the Eastside Neighborhood Planning Units. Developers are required to attend the Advisory Committee Meeting.

The Advisory Committee's role is to give a recommendation to the ADA Board, which has the authority to approve projects for Tax Allocation District Financing. The Advisory Committee will either recommend TAD funding to support a project or decline the project. (Note: The ADA Board has the authority to approve projects that have not been recommended by the Advisory Committee.)

If the project is not recommended for TAD funding by the Advisory Committee, the Developer may: (1) request that the project be considered by the ADA Board without Advisory Committee support, (2) modify the project and resubmit it to the Advisory Committee at a later date or (3) withdraw the project.

4. After the Advisory Committee issues a recommendation, ADA staff will place the project on the next appropriate ADA Board Meeting Agenda. The Developer will be notified when ADA's Board will

¹ Code of Ordinances of the City of Atlanta, Part Two Article X, Division 12

² Code of Ordinances of the City of Atlanta, Part Two Article XI, Division 1

consider their project for funding. Developers are required to attend the ADA Board Meeting and be prepared to answer questions from the Board members regarding their project.

5. Upon approval for TAD funding by the ADA Board, the project will be earmarked for inclusion in the next Eastside Tax Allocation Bond Issue. (TAD funds are generally derived from selling Tax Allocation Bonds).
6. When the total value of funding for approved projects is large enough to support a bond issue (at least \$10 million), ADA staff will bundle that project with other approved projects to be included in an Eastside Tax Allocation Bond Issue. Projects earmarked for a bond issue will undergo rigorous review by Bond Underwriters and Bond Counsel. Associated due diligence includes real estate valuation, market absorption analysis and feasibility studies. Developers of approved projects will be required to enter into a "Development Agreement" with the City of Atlanta as part of the Tax Allocation Bond Issue. The "Development Agreement" outlines the relationship between the Developer, ADA, and the City. It also details disbursement of Tax Allocation Bond proceeds.
7. Upon completion of all bond documents, ADA and the City's Finance Department will submit the completed bond documents for City Council approval.
8. Following City Council approval, Tax Allocation Bonds will be sold and net bond proceeds will be distributed to Developers pursuant to their respective "Development Agreement".
9. Application Expiration due to Project Delay: If construction is not commenced within six (6) months of the date of bond issuance the Application may be declared null and void. In this case, a new application and payment of the application fee, would be required to reconsider the transaction at a later date.
10. Material Project Changes: The amount and timing of TAD proceeds may change if the underlying deal and/or associated sponsorship materially changes, regardless of whether the original transaction has already been approved by the ADA Board. At ADA's option, a new application, along with an application fee, may be required to reconsider a significantly different transaction.

FEES AND CHARGES

A. APPLICATION FEE

The greater of (a) ten basis points (.10%) of the total amount of the gross estimated total TAD bonds applied for or (b) \$2,500, is payable to The Atlanta Development Authority when the Application is submitted to ADA. Any application submitted without full application fee is deemed incomplete. The application fee is non-refundable.

B. COMMITMENT FEE

The greater of (a) fifteen basis points (.15%) or (b) \$15,000. Payable one time upon The Atlanta Development Authority Board of Directors approval of the project.

C. ADMINISTRATIVE FEE

The present value, discounted at a rate of four percent (4%) of the greater of (a) 20 basis points (.20%) of the gross principal amount of each project's pro rata share of the outstanding bonds for the life of the bonds, or (b) \$5,000 annually. This Administrative Fee is payable in two installments: the first year's Administrative Fee is due at financial closing and the balance is payable upon the first disbursement of funds from bond proceeds.

D. DUE DILIGENCE AND LEGAL DEPOSIT

A deposit of \$20,000 is required upon The Atlanta Development Authority Board of Directors approval of the project to cover costs incurred by ADA associated with due diligence and drafting of the Development

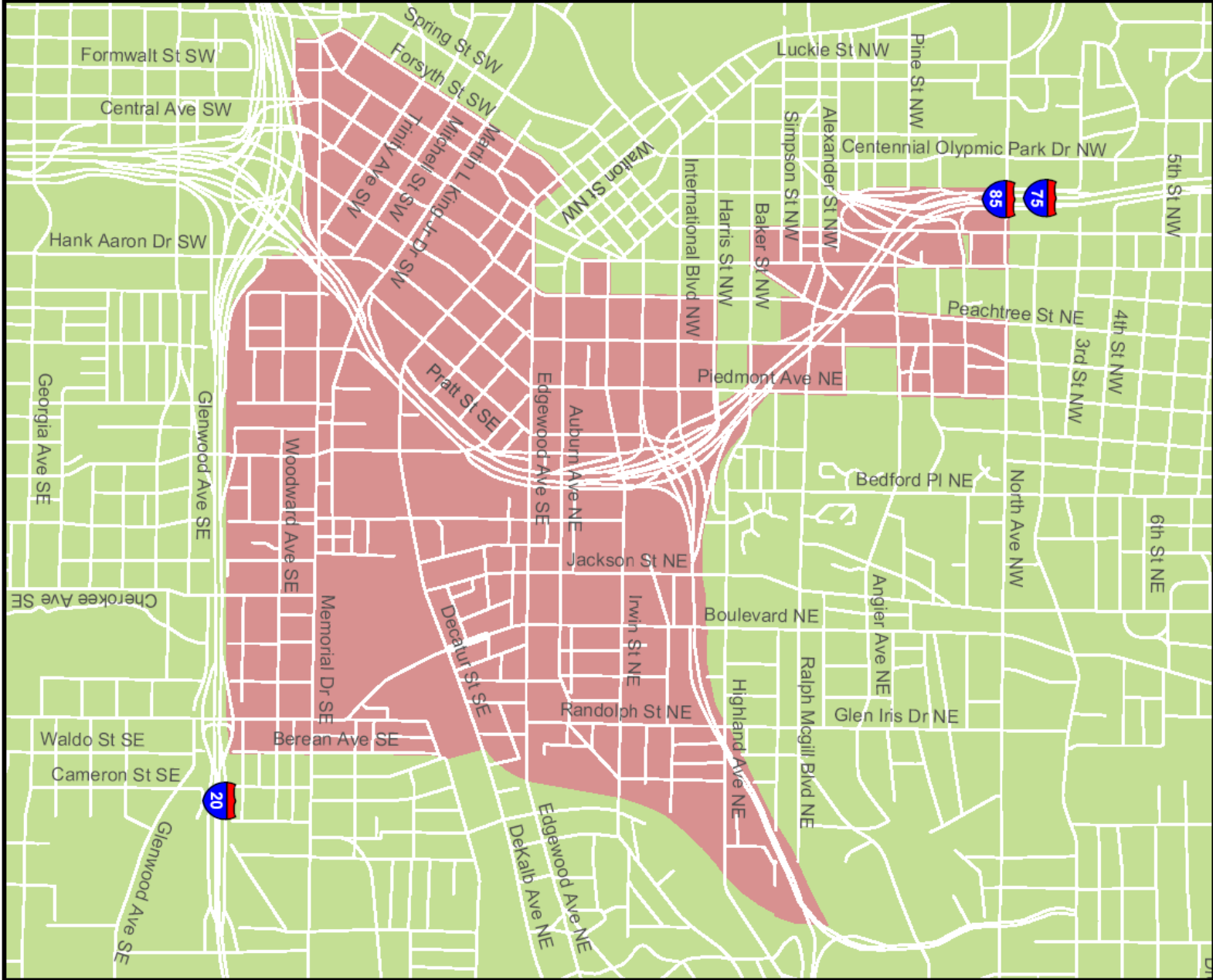
Agreement. The Due Diligence and Legal Deposit will be returned to the applicant at financial closing and these costs will be payable by the applicant from its share of TAD Bond proceeds.

E. BOND COST OF ISSUANCE

Includes, but is not limited to bond counsel fees, bond underwriter fees, trustee fees, trustee and underwriter counsel fees, bond printing, bond validation and publication costs, and ADA's financial advisor, if any. These costs, along with an approved applicant's share of any capitalized interest and required reserve funds, shall be paid pro rata by such applicant from its share of TAD Bond proceeds.

Note: ADA reserves the right to waive some or all fees and charges incurred by non-profit entities.

Eastside TAD





A7: Westside TAD Program Description



THE WESTSIDE TAX ALLOCATION DISTRICT PROGRAM DESCRIPTION

Applications for Westside TAD funding are currently not being accepted. The Application will be posted on The Atlanta Development Authority website once the application period has commenced.

THE ATLANTA DEVELOPMENT AUTHORITY

The Atlanta Development Authority (“ADA”) is a public body corporate and politic and an instrumentality of the City of Atlanta (the “City”) created to promote the revitalization and growth of the City. It represents a consolidation of the City’s economic and community development efforts in real estate, finance, marketing and employment, for the purpose of providing a focal point for improving Atlanta’s neighborhoods and the quality of life for all of its citizens. ADA is the cornerstone of an overall effort to provide economic and redevelopment services in a more effective and efficient manner.

TAX ALLOCATION DISTRICTS

Also known as Tax Increment Financing (“TIF”), Tax Allocation Financing is a redevelopment and financing tool by which governments can provide financial assistance to eligible public and private redevelopment efforts within an officially designated area or tax allocation district (“TAD”). Increases in property tax revenues, which are generated primarily from new investment in the district, are allocated to pay infrastructure costs or certain private development costs within the TAD. This is primarily done through the issuance of Tax Allocation District Bonds.

THE WESTSIDE TAX ALLOCATION DISTRICT

In an effort to promote positive development around Centennial Olympic Park and the surrounding communities, ADA developed the Westside Redevelopment Plan & Tax Allocation Bond District. The Westside Redevelopment Plan is a compilation of all of the following efforts: English Avenue Redevelopment Plan, Master Plan for Vine City/Ashby, MLK Redevelopment Plan, Revitalization Plan for the Fairlie Poplar District, Centennial Olympic Park Area SPI Development Policies, the 1995 ULI Centennial Olympic Park Study, and the Simpson Road Redevelopment Plan.

In 1998 the City of Atlanta, Fulton County, and the Atlanta School Board passed resolutions creating the Westside Tax Allocation District, establishing ADA as the City’s Redevelopment Agent and, in the case of the County and School Board, consenting to the inclusion of their respective portions of all ad valorem tax increments created within the District and the application of those tax increments to pay certain qualified redevelopment costs. As Redevelopment Agent, ADA is responsible for promoting positive development within the Westside TAD and administering the TAD financing process.

The Westside TAD covers 1,451 acres. There are three distinct subareas within the TAD:

1. The Neighborhood Subarea includes the historic neighborhoods of Vine City and English Avenue.
2. Downtown portion of the TAD has been subdivide into two subareas:
 - a. The Centennial Olympic Park (“COP”) Subarea includes the property surrounding Centennial Olympic Park.
 - b. The Southern Subarea includes portions of the Fairlie Poplar District, the South Central Business District, the railroad gulch and Castleberry Hill.

Developments within these three subareas of the Westside TAD are eligible for TAD funding. A map of the Westside TAD boundaries and subareas is attached. The district falls within Neighborhood Planning Units M and L.

ELIGIBILITY & REQUIREMENTS

A. ELIGIBLE DEVELOPMENTS

TAD funding is available to developments in the Westside TAD that support the goals and objectives of the Westside Redevelopment Plan which anticipates the following land uses:

Transportation:

- Creation of new and improved linkages between the CBD, Georgia Tech, Atlanta University and adjoining neighborhoods
- Parking improvements to support private/public redevelopment
- Improved pedestrian environments
- Maximized access to MARTA and future commuter rail

Community Environment:

- Improved quality of life for residents and businesses
- Completed facilities to increase tourism
- Improved public parks and plazas
- A better overall atmosphere and environment, including greater public safety

Economic Incentives:

- Overcome impediments to development and increase investments in the area.
- An additional financing vehicle to assist in redevelopment efforts
- Increased tax base
- Assembly of land and air rights to accomplish redevelopment and community revitalization
- Increased employment through job retention and creation
- Public improvements including streetscaping, streets and sewers, and greenway trails to support public/private redevelopment efforts.

Land Uses are intended to generate meaningful community revitalization through a blending of diverse yet compatible uses. Land uses established by the plan include:

- Neighborhood Residential: public, private, market rate, affordable and senior housing
- Mixed Use Development: commercial, residential, retail and entertainment
- Community Services: retail, schools, childcare, public safety facilities
- Others: Hotels, corporate offices and headquarters, art and cultural facilities

B. WESTSIDE TAD NEIGHBORHOOD FUND

The Westside Redevelopment Plan also established a "Neighborhood Fund".

The Neighborhood Fund is a mechanism to help promote redevelopment in the Vine City and English Avenue Neighborhoods. Redevelopment potential for the Downtown area of the Westside TAD was perceived as greater than the potential for redevelopment in the Neighborhood area of the district. In order to promote a more equitable redevelopment future, the Westside Redevelopment Plan provided the Neighborhood area of the TAD with an additional funding source, the Westside TAD Neighborhood Fund.

The Neighborhood Fund is supported by TAD Bond proceeds derived from project increments created in the COP and Southern Subareas of the TAD. When a tax allocation bond issue has been sold, 20% of the bond proceeds supported by COP and Southern project tax increments are deposited in the Westside TAD Neighborhood Fund. One hundred percent of the net bond proceeds supported by Neighborhood project tax increments are allocated to the respective Neighborhood project. Projects within the Neighborhood area of the TAD are eligible to apply for bond proceeds, Neighborhood Fund financing or

both. As is the case when applying for Westside TAD bond proceeds, projects applying for monies from the Neighborhood Fund must meet the goals and objectives of the Westside Redevelopment Plan.

C. PUBLIC PURPOSE PROJECT FUND

The Public Purpose Project Fund was established to help finance projects that serve a public purpose, such as: streetscape improvements, transportation projects, affordable housing and other economic development projects. Although these initiatives may not generate new property tax revenues, they are likely to increase property values on adjacent sites and improve the overall quality of life in the TAD.

The Public Purpose Project Fund is supported by TAD Bond proceeds derived from project increments created in the COP Subarea of the TAD, as defined on the attached map. When tax allocation bonds have been sold, up to 20% of the bond proceeds supported by COP project tax increments are deposited in the Public Purpose Project Fund (in addition to the 20% of bond proceeds allocated to the Neighborhood Fund).

D. AFFORDABLE HOUSING

Increasing the supply of affordable housing is a major objective for the City of Atlanta. TAD applications for residential projects that include an affordability component, e.g. twenty percent (20%) of new housing units, will be looked on more favorably.

E. KEY POLICY COMPONENTS

- Approved projects must be consistent with goals and objectives of the applicable redevelopment plan(s).
- The optimal use of public dollars will be sought. Projects proposed for inclusion in bond issues and used for bond sizing will be assessed for their economic viability, based in part on current and near term market demand and likely product absorption. Projects based largely on speculative office space, and other high-risk uses, will be less favorably received unless the project would meet a clear public purpose goal.
- We will strive to limit TAD funding to those projects that would not be economically feasible without public subsidy. The existence of a project within a TAD does not automatically entitle the developer to receive TAD proceeds. Bond issues will be sized using projects that are reasonably projected to generate a net increase in the tax base. Projects receiving bond proceeds may include the foregoing, as well as projects contributing to various public purpose goals and infrastructure improvements consistent with the redevelopment plan. The amount of funding granted to a specific project may reflect an allocation of less than 100% of the projected tax increment generated by that project a) in order to address public purpose goals b) based on the assessment of financial need made by ADA and c) other factors as determined by ADA.
- Developer equity, including but not limited to land value and cash at risk, will be invested in the project before TAD funding is made available
- Unless a specific exception is granted by ADA, TAD funding approval should be obtained before start of construction on qualified projects. Unless a specific exception is granted by ADA, TAD funds are disbursed to developers as taxable value is created.
- Developers will use best efforts to comply with the City's Equal Business Opportunity Program¹ with respect to the participation of minority business enterprises, female enterprises, disadvantaged business enterprises and business enterprises located within the City of Atlanta, in all business opportunities which relate to the Project.
- Developer shall comply with the City's First Source Job Policy², with respect to the hiring and training of low-income City of Atlanta residents, as administered by the Atlanta Workforce Development Agency.

¹ Code of Ordinances of the City of Atlanta, Part Two Article X, Division 12

² Code of Ordinances of the City of Atlanta, Part Two Article XI, Division 1

WESTSIDE TAD FINANCING PROCESS

The Westside Tax Allocation District financing process includes, but is not limited to, the following steps:

1. In order to determine eligibility of a project for TAD financing, interested applicants shall:
 - a. Contact ADA to arrange an initial meeting to discuss the viability of your proposed project.
Call:
Amanda Rhein
Senior Project Manager – Tax Allocation Districts
Atlanta Development Authority
(404) 614-8282
 - b. Complete the Westside TAD Application and package in a 3-ring binder with a complete electronic copy of the Application on a CD with content, tabs, formatting and order of data identical to that of the hard copy Application. One copy of the completed application shall be submitted to The Atlanta Development Authority, accompanied by the non-refundable application fee.
2. Upon receipt of an application, ADA staff will review the application for content and completeness. Incomplete applications will not be processed. (An application will be considered received only when it is complete and the application fee has been paid.) ADA reserves the right to select and employ third party consultants to assist in the analysis and review of the proposed project, its financing and the associated tax increment. The applicant shall pay the cost of such ADA consultants, whether or not the project is constructed.
3. After the application has been reviewed for consistency with City goals, and received an initial favorable evaluation, ADA staff will convene a meeting of either the Westside TAD Downtown Advisory Board or the Westside TAD Neighborhood Advisory Board ("Advisory Board"), depending on the location of the Project. Developers are required to attend and present to the Advisory Board.

The Advisory Board's role is to give a recommendation to the ADA Board, which has the authority to approve projects for Tax Allocation District Financing. The Advisory Board will either recommend TAD funding to support a project or decline the project. (Note: The ADA Board has the authority to approve projects that have not been recommended by the Advisory Board.)

If the project is not recommended for TAD funding by the Advisory Board, the Developer may:
(1) request that the project be considered by the ADA Board without Advisory Committee support,
(2) modify the project and resubmit it to the Advisory Committee at a later date or (3) withdraw the project.

4. After the Advisory Committee issues a recommendation, ADA staff will place the project on the next appropriate ADA Board Meeting Agenda. The Developer will be notified when ADA's Board will consider their project for funding. Developers are required to attend the ADA Board Meeting and be prepared to answer questions from the Board members regarding their project.
5. Upon approval for TAD funding by the ADA Board, the project will be earmarked for inclusion in the next Westside Tax Allocation Bond Issue. (TAD funds are generally derived from selling Tax Allocation Bonds).
6. When the total value of funding for approved projects is large enough to support a bond issue (at least \$10 million), ADA staff will bundle that project with other approved projects to be included in a Westside Tax Allocation Bond Issue. Projects earmarked for a bond issue will undergo rigorous review by Bond Underwriters and Bond Counsel. Associated due diligence includes real estate valuation, market absorption analysis and feasibility studies. Developers of approved projects will be

required to enter into a "Development Agreement" with the City of Atlanta as part of the Tax Allocation Bond Issue. The "Development Agreement" outlines the relationship between the Developer, ADA, and the City. It also details disbursement of Tax Allocation Bond proceeds.

7. Upon completion of all bond documents, ADA and the City's Finance Department will submit the completed bond documents for City Council approval.
8. Following City Council approval, Tax Allocation Bonds will be sold and net bond proceeds will be distributed to Developers pursuant to their respective "Development Agreement".
9. Application Expiration due to Project Delay: If construction is not commenced within six (6) months of the date of bond issuance the Application may be declared null and void. In this case, a new application and payment of the application fee would be required to reconsider the transaction at a later date.
10. Material Project Changes: The amount and timing of TAD proceeds may change if the underlying deal and/or associated sponsorship materially changes, regardless of whether the original transaction has already been approved by the ADA Board. At ADA's option, a new application, along with an application fee, may be required to reconsider a significantly different transaction.

FEES AND CHARGES

A. APPLICATION FEE

The greater of (a) ten basis points (.10%) of the total amount of the gross estimated total TAD bonds applied for or (b) \$2,500, is payable to The Atlanta Development Authority when the Application is submitted to ADA. Any application submitted without full application fee is deemed incomplete. The application fee is non-refundable.

B. COMMITMENT FEE

The greater of (a) fifteen basis points (.15%) or (b) \$15,000. Payable one time upon The Atlanta Development Authority Board of Directors approval of the project.

C. ADMINISTRATIVE FEE

The present value, discounted at a rate of four percent (4%) of the greater of (a) 20 basis points (.20%) of the gross principal amount of each project's pro rata share of the outstanding bonds for the life of the bonds, or (b) \$5,000 annually. This Administrative Fee is payable in two installments: the first year's Administrative Fee is due at financial closing and the balance is payable upon the first disbursement of funds from bond proceeds.

D. DUE DILIGENCE AND LEGAL DEPOSIT

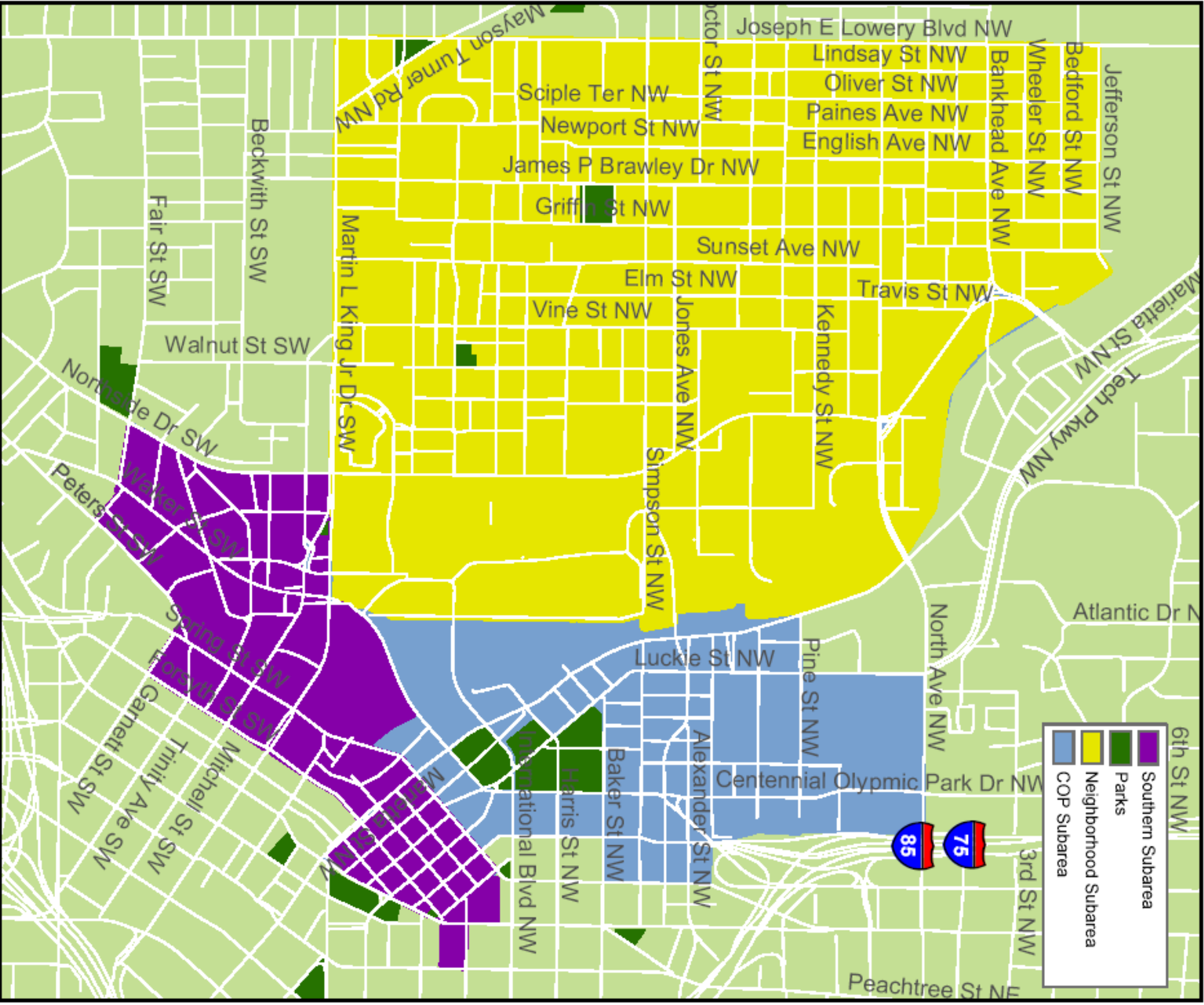
A deposit of \$20,000 is required upon The Atlanta Development Authority Board of Directors approval of the project to cover costs incurred by ADA associated with due diligence and drafting of the Development Agreement. The Due Diligence and Legal Deposit will be returned to the applicant at financial closing and these costs will be payable by the applicant from its share of TAD Bond proceeds.

E. BOND COST OF ISSUANCE

Includes, but is not limited to bond counsel fees, bond underwriter fees, trustee fees, trustee and underwriter counsel fees, bond printing, bond validation and publication costs, and ADA's financial advisor, if any. These costs, along with an approved applicant's share of any capitalized interest and required reserve funds, shall be paid pro rata by such applicant from its share of TAD Bond proceeds.

Note: ADA reserves the right to waive some or all fees and charges incurred by non-profit entities.

Westside TAD Subareas





A8: Financial Feasibility Summary





A8: Financial Feasibility Summary

Financial Feasibility Summary

	New Construction	Retail Space (2,000 SF)	Retail Space (5,000 SF)	Moving Museum	Streetcar Kiosk	Curb Market Booth
Assumptions						
Participation Revenue	\$5.00	\$2.50	\$5.00	\$2.50	\$1,667	\$0
Estimated Annual Attendance	20,000	6,500	15,000	5,000	20,000	2,000
Membership Dues	\$25	\$25	\$25	\$25	\$0	\$0
Estimated Annual Memberships	200	100	150	100	0	0
Museum Staff (<i>see note</i>)	3	None	1	2	1	None
Facility Size (SF)	5,000	2,000	5,000	0	0	0
Est. Monthly Occupancy Costs	\$12,500	\$2,333	\$5,833	\$0	\$0	\$0
INITIAL CAPITAL COSTS	\$3,000,000	\$315,000	\$415,000	\$500,000	\$200,000	\$5,000
Summary of Annual Operating Budget						
Total Revenue	\$313,750	\$64,750	\$178,750	\$55,000	\$20,000	\$10,000
Total Expenses	\$307,750	\$64,750	\$177,250	\$52,250	\$20,000	\$10,000
ANNUAL NET INCOME	\$6,000	\$0	\$1,500	\$2,750	\$0	\$0





A8: Financial Feasibility Summary

New Construction Operating Budget

Assumptions:

Participation Revenue	\$5
Estimated Annual Attendance	20,000
Membership Dues	\$25
Estimated Annual Memberships	200
Museum Staff (<i>see note</i>)	3
Facility Size (SF)	5,000
Est. Monthly Occupancy Costs	\$12,500

	Monthly	Annual	%
Income			
Participation Revenue	\$8,333	\$100,000	32%
Membership Dues	\$417	\$5,000	2%
Gift Shop	\$4,063	\$48,750	16%
Special Events	\$2,917	\$35,000	11%
Donations & Grants	\$10,417	\$125,000	40%
TOTAL INCOME	\$26,146	\$313,750	100%

Expense			
Museum Staff	\$4,167	\$50,000	16%
Marketing & Promotions	\$2,083	\$25,000	8%
Permits & Licenses	\$21	\$250	0%
Education Supplies & Materials	\$417	\$5,000	2%
Gift Shop Inventory	\$3,125	\$37,500	12%
Occupancy Costs	\$12,500	\$150,000	49%
Insurance	\$833	\$10,000	3%
Utilities & Facility Maintenance	\$2,500	\$30,000	10%
TOTAL EXPENSES	\$25,646	\$307,750	100%
NET INCOME	\$500	\$6,000	

Note: One dedicated staff member for over-sight of day-to-day operations supported by two part-time support persons and volunteers for event staffing, gift shop / admissions.





A8: Financial Feasibility Summary

2,000 SF Retail Space Operating Budget

Assumptions:

Participation Revenue	\$2.50
Estimated Annual Attendance	6,500
Membership Dues	\$25
Estimated Annual Memberships	100
Museum Staff	None
Facility Size (SF)	2,000
Est. Monthly Occupancy Costs	\$14

	Monthly	Annual	%
Income			
Participation Revenue	\$1,354	\$16,250	25%
Membership Dues	\$208	\$2,500	4%
Gift Shop	\$2,500	\$20,000	31%
Special Events	\$500	\$6,000	9%
Donations & Grants	\$1,667	\$20,000	31%
TOTAL INCOME	\$6,229	\$64,750	100%

Expense			
Museum Staff	\$0	\$0	0%
Marketing & Promotions	\$833	\$10,000	15%
Permits & Licenses	\$21	\$250	0%
Education Supplies & Materials	\$125	\$1,500	2%
Gift Shop Inventory	\$833	\$10,000	15%
Occupancy Costs	\$2,333	\$28,000	43%
Insurance	\$417	\$5,000	8%
Utilities & Facility Maintenance	\$833	\$10,000	15%
TOTAL EXPENSES	\$5,396	\$64,750	100%

NET INCOME	\$833	\$0	
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A8: Financial Feasibility Summary

5,000 SF Retail Space Operating Budget

Assumptions:

Participation Revenue	\$5
Estimated Annual Attendance	15,000
Membership Dues	\$25
Estimated Annual Memberships	150
Museum Staff (<i>see note</i>)	1
Facility Size (SF)	5,000
Est. Monthly Occupancy Costs	\$14

Income	Monthly	Annual	%
Participation Revenue	\$6,250	\$75,000	42%
Membership Dues	\$313	\$3,750	2%
Gift Shop	\$4,167	\$50,000	28%
Special Events	\$1,250	\$15,000	8%
Donations & Grants	\$2,917	\$35,000	20%
TOTAL INCOME	\$14,896	\$178,750	100%

Expense			
Museum Staff	\$2,917	\$35,000	20%
Marketing & Promotions	\$1,000	\$12,000	7%
Permits & Licenses	\$21	\$250	0%
Education Supplies & Materials	\$417	\$5,000	3%
Gift Shop Inventory	\$2,083	\$25,000	14%
Occupancy Costs	\$5,833	\$70,000	39%
Insurance	\$833	\$10,000	6%
Utilities & Facility Maintenance	\$1,667	\$20,000	11%
TOTAL EXPENSES	\$14,771	\$177,250	100%
NET INCOME	\$125	\$1,500	

Note: One dedicated staff member for over-sight of day-to-day operations supported by volunteers for event staffing, gift shop / admissions.





A8: Financial Feasibility Summary

Moving Museum Operating Budget

Assumptions:

Participation Revenue	\$2.50
Estimated Annual Attendance	5,000
Membership Dues	\$25
Estimated Annual Memberships	100
Museum Staff (<i>see note</i>)	2
Facility Size (SF)	0
Est. Monthly Occupancy Costs	\$0

Income	Monthly	Annual	%
Participation Revenue	\$1,042	\$12,500	23%
Membership Dues	\$208	\$2,500	5%
Gift Shop	\$833	\$10,000	18%
Special Events	\$417	\$5,000	9%
Donations & Grants	\$2,083	\$25,000	45%
TOTAL INCOME	\$4,583	\$55,000	100%

Expense			
Museum Staff	\$2,667	\$32,000	61%
Marketing & Promotions	\$208	\$2,500	5%
Permits & Licenses	\$21	\$250	0%
Education Supplies & Materials	\$125	\$1,500	3%
Gift Shop Inventory	\$417	\$5,000	10%
Occupancy Costs	\$0	\$0	0%
Insurance	\$83	\$1,000	2%
Utilities & Facility Maintenance	\$833	\$10,000	19%
TOTAL EXPENSES	\$4,354	\$52,250	100%
NET INCOME	\$229	\$2,750	

Note: One part-time staff member for over-sight of day-to-day operations and one part-time streetcar operator.





A8: Financial Feasibility Summary

Streetcar Kiosk Stops Operating Budget

Assumptions:

Participation Revenue	\$1,667
Estimated Annual Attendance	20,000
Membership Dues	\$0
Estimated Annual Memberships	0
Museum Staff (<i>see note</i>)	1
Facility Size (SF)	0
Est. Monthly Occupancy Costs	\$0

	Monthly	Annual	%
Income			
Participation Revenue	\$1,667	\$20,000	100%
Membership Dues	\$0	\$0	0%
Gift Shop	\$0	\$0	0%
Special Events	\$0	\$0	0%
Donations & Grants	\$0	\$0	0%
TOTAL INCOME	\$1,667	\$20,000	100%

Expense			
Museum Staff	\$833	\$10,000	50%
Marketing & Promotions	\$0	\$0	0%
Permits & Licenses	\$0	\$0	0%
Education Supplies & Materials	\$0	\$0	0%
Gift Shop Inventory	\$0	\$0	0%
Occupancy Costs	\$0	\$0	0%
Insurance	\$0	\$0	0%
Utilities & Facility Maintenance	\$833	\$10,000	50%
TOTAL EXPENSES	\$1,667	\$20,000	100%
NET INCOME	\$0	\$0	

Note: Streetcar kiosk information would be managed by development company under an annual contract.





A8: Financial Feasibility Summary

Sweet Auburn Curb Market Booth Operating Budget

Assumptions:

Participation Revenue	\$0
Estimated Annual Attendance	2,000
Membership Dues	\$0
Estimated Annual Memberships	0
Museum Staff (<i>see note</i>)	None
Facility Size (SF)	0
Est. Monthly Occupancy Costs	\$0

	Monthly	Annual	%
Income			
Participation Revenue	\$0	\$0	0%
Membership Dues	\$0	\$0	0%
Gift Shop	\$0	\$0	0%
Special Events	\$0	\$0	0%
Donations & Grants	\$833	\$10,000	100%
TOTAL INCOME	\$833	\$10,000	100%

Expense			
Museum Staff	\$0	\$0	0%
Marketing & Promotions	\$833	\$10,000	100%
Permits & Licenses	\$0	\$0	0%
Education Supplies & Materials	\$0	\$0	0%
Gift Shop Inventory	\$0	\$0	0%
Occupancy Costs	\$0	\$0	0%
Insurance	\$0	\$0	0%
Utilities & Facility Maintenance	\$0	\$0	0%
TOTAL EXPENSES	\$833	\$10,000	100%
NET INCOME	\$0	\$0	

Note: A dedicated and enthusiastic volunteer would manage the booth on a limited part-time basis.





A9: Partnerships & Alliances Contacts





A9: Partnership & Alliance Contacts

EDUCATIONAL/NON-PROFIT ORGANIZATIONS

The APEX (African American Panoramic Experience) Museum
The APEX Museum
135 Auburn Avenue
Atlanta, GA 30303
Tel (404) 523-2739
Fax (404) 523-3248
Email: apexmuseum@aol.com

Association of Railway Museums
Tourist Railway Association
P.O. Box 1189
Covington, GA 30015
Contact: Suzanne Grace, Executive Director
Tel (770) 278-0088

Atlanta History Center
130 West Paces Ferry Road NW
Atlanta, GA 30305-1366
Tel (404) 814-4000

Atlanta Preservation Center
327 St. Paul Avenue SE
Atlanta GA 30312-3129
Tel (404) 688-3353
Fax (404) 688-3357

Georgia Aquarium
225 Baker Street NW
Atlanta, GA 30313
Tel (404) 581-4000





A9: Partnership & Alliance Contacts

Georgia Historical Society

Atlanta Office

260 14th Street, N.W., Suite A-148

Atlanta, GA 30318

Tel (404) 382-5410

Fax (404) 671-8570

Georgia Institute of Technology

Division of Administration and Finance

Georgia Institute of Technology, Carnegie Building

223 Uncle Heinie Way, N.W.

Atlanta, GA 30332-0325

Tel (404) 894-4615

Fax: (404) 894-1277

Georgia State University

Office of Civic Engagement

320 Student Center

44 Courtland Street

Atlanta, GA 30302-3973

Tel (404) 413-1550

Fax (404) 413-1554

The Georgia Trust for Historic Preservation

1516 Peachtree Street, NW

Atlanta, GA 30309

Tel (404) 881-9980

Fax (404) 875-2205

The King Center

449 Auburn Avenue, NE

Atlanta, GA 30312

Tel (404) 526-8900





A9: Partnership & Alliance Contacts

Public Broadcasting Atlanta

Atlanta Educational Telecommunications Collaborative, Inc.

740 Bismark Rd. NE

Atlanta, GA 30324

Tel (678) 686-0321

Southeastern Railway Museum

3595 Buford Hwy.

Duluth, GA 30096

Sweet Auburn Curb Market

209 Edgewood Ave. SE

Atlanta, GA 30303

Tel (404) 659-1665

The World of Coca-Cola

121 Baker St. NW

Atlanta, GA 30313-1807

Tel (404) 676-5151

GOVERNMENTAL/POLITICAL ORGANIZATIONS

Georgia World Congress Center

285 Andrew Young International Blvd., NW

Atlanta, Georgia 30313-1591

Contact: Mr. Kevin Duvall, Chief Operating Officer

Email: kduvall@gwcc.com

Tel (404) 223-4000

Fax (404) 223-4011

Georgia Department of Natural Resources

Historic Preservation Division

254 Washington Street, SW

Ground Level

Atlanta, GA 30334

Tel (404) 656-2840

Fax (404) 657-1368





A9: Partnership & Alliance Contacts

Georgia Department of Transportation

One Georgia Center
600 West Peachtree NW
Atlanta, Georgia 30308
Contact: Communications Office
Karlene Barron, Administrator
18th Floor
Tel (404) 631-1931

Metropolitan Atlanta Rapid Transit Authority (MARTA)

2424 Piedmont Road, NE
Atlanta, GA 30324-3311
Contact: Paul Grether, Manager of Streetcar Development
Email: PGrether@ismarta.com

Metro Atlanta Chamber of Commerce

235 Andrew Young International Blvd. NW
Atlanta, Georgia 30303
Tel (404) 880-9000

COMMERCIAL ORGANIZATIONS

Cousins Properties Incorporated

191 Peachtree Street NE
Suite 500
Atlanta, GA 30303-1740

CSX

1590 Marietta Blvd NW
Atlanta, Georgia 30318
Tel (404) 352-3501 (Main)





A9: Partnership & Alliance Contacts

Deloitte & Touche

191 Peachtree St.
Suite 2000
Atlanta GA
30303-1749
Tel (404) 220-1500 (Main)

Georgia Pacific

133 Peachtree St., N.E.
Atlanta, GA 30303
Tel (404) 652-4000 (Main)

Legacy Property Group

300 Marietta Street, Suite 304
Atlanta, GA 30313
Tel (404) 222-9100

Norfolk Southern

1200 Peachtree Street Northeast
Atlanta, GA 30309
Tel (404) 529-1000 (Main)

Portman Holdings, LLC

303 Peachtree Center Avenue
Suite 575
Atlanta, GA 30303

Turner Broadcasting System, Inc.

One CNN Center
Atlanta, Georgia 30303
Tel (404) 827-1700





A10: Key Stakeholders





A10: Key Stakeholders

COMPANIES & ORGANIZATIONS	
100 Black Men of Atlanta, Inc.	
200 Peachtree	
A. Brown-Olmstead Associates	
AGL Resources	
AirTran Airways	
Alston & Bird, LLP	
American Cancer Society	
Ansley Park Civic Association	
AT&T	
Atlanta Botanical Garden	
Atlanta Convention & Visitors Bureau	
Atlanta Daily World	
Atlanta Downtown Neighborhood Association	
Atlanta Dream	
Atlanta Falcons	
Atlanta Hawks / Philips Arena	
Atlanta Housing Authority	
Atlanta Marriott Marquis Hotel	
AVVVE	
Barry Real Estate Companies	
BB&T	
BDO USA, LLP	
BellSouth / AT&T	
Blueprint Midtown II	
Capitol City Bank & Trust Company	
CARTER	
CB Richard Ellis	
Center for Quality Growth & Regional Development . Georgia Tech	
Charles Brewer Enterprises	
Childress Klein Properties	
Citizens Trust Bank	
Colliers International	
Columbia Theological Seminary	





A10: Key Stakeholders

Cooper Carry, Inc.
Cousins Properties, Inc
Cox Enterprises, Inc.
Cushman & Wakefield
Daniel Corporation
Deloitte
Delta Airlines, Inc.
Dewberry Capital
DLA Piper
Downtown Dining District Representative
Emory University
Emory University
Emory University Hospital Midtown
Eola Capital
Ernst & Young, LLP
Federal Reserve Bank of Atlanta
Federal Reserve Bank of Atlanta
Fernbank Museum of Natural History
Fisher & Phillips LLP
Four Seasons Hotel Atlanta
Georgia Institute of Technology
Georgia Pacific
Georgia Power
Georgia State University
Georgia Trust for Historic Preservation
Grady Health System
H.J. Russell & Company
Heery International
Hines Interests
Holder Properties
House of Representatives
Invesco
Jackson Spalding
Jamestown Properties





A10: Key Stakeholders

Jones Day
Jones Day
Kilpatrick Townsend
Kim King Associates, Inc.
King & Spalding
KPMG
Lanier Holdings
Legacy Property Group, LLC
Loews Atlanta Hotel
McKenna Long & Aldridge LLP
McKinsey & Company
Meiro Atlanta Chamber of Commerce
Midtown Alliance
Midtown Bank and Trust Company
Midtown Neighbors Association
Miller & Martin LLC
National Museum of Health
Noble Investment Group
North American Properties
Novare Group, Inc.
Parking Company of America
Paul Hastings
Perkins + Will
Piedmont Park Conservancy
Pope & Land Enterprises
Portman Holdings, Inc.
Post Properties
PricewaterhouseCoopers, LLP
Regions Bank
Reynolds Capital Group
Reznick Group
Selig Enterprises
Serenbe
Seven Oaks Company, LLC





A10: Key Stakeholders

Seyfarth Shaw LLP
Sgs Ltd.
Shailendra Group, LLC
Skanska
Smith, Gambrell & Russell
Stanley, Love-Stanley PC
Studley, Inc.
SunTrust
Sutherland Asbill & Brennan
The Boston Consulting Group, Inc.
The Coca-Cola Company
The Community Foundation for Greater Atlanta
The Integral Group
The King Center
Tishman Speyer
Troutman Sanders
Turner Broadcasting System, Inc.
Turner Enterprises, Inc.
Turner Properties
tvs design
TWD, Inc.
Underground Atlanta
Urban Realty Partners
VeenendaalCave
Waffle House
Wells Fargo
Winter Group of Companies
Woodruff Arts Center
Yancey Brothers Company





A10: Key Stakeholders

INDIVIDUALS			COMPANY
FIRST NAME	LAST NAME		
John T.	Grant, Jr.	100 Black Men of Atlanta, Inc.	
Robert	Patterson	200 Peachtree	
Amanda	Brown-Olmstead	A. Brown-Olmstead Associates	
Henry P.	Linginfelter	AGL Resources	
Tad	Hutcheson	AirTran Airways	
Timothy J.	Pakenham	Alston & Bird, LLP	
Richard	Hays	Alston & Bird, LLP	
Ben F.	Johnson, III	Alston & Bird, LLP	
Sheffield	Hale	American Cancer Society	
Julia	Emmons	Ansley Park Civic Association	
Mary Jo	Peed	AT&T	
John P.	Vinson	AT&T	
Mary Pat	Matheson	Atlanta Botanical Garden	
William	Pate	Atlanta Convention & Visitors Bureau	
Alexis	Scott	Atlanta Daily World	
Jeffrey	Lam	Atlanta Downtown Neighborhood Association	
Kathy	Betty	Atlanta Dream	
Richard J.	McKay	Atlanta Falcons	
Bob	Williams	Atlanta Hawks / Philips Arena	
Renee	Glover	Atlanta Housing Authority	
Erica	Qualls	Atlanta Marriott Marquis Hotel	
Merry	McCleary	AVYVE	
Harvey	Rudy	Barry Real Estate Companies	
Robert	King	BB&T	
Jay	Goldman	BDO USA, LLP	
F. Duane	Ackerman	BellSouth / AT&T	
Harald R.	Hansen	Blueprint Midtown II	
George	Andrews	Capitol City Bank & Trust Company	
R. Scott	Taylor, Jr.	CARTER	
John D.	Shlesinger	CB Richard Ellis	
Catherine L.	Ross	Center for Quality Growth & Regional Development - Georgia Tech	
Charles M.	Brewer	Charles Brewer Enterprises	





A10: Key Stakeholders

J. Donald	Childress	Childress Klein Properties
James	Young	Citizens Trust Bank
Robert S.	Mathews	Colliers International
Caldwell	Zimmerman	Colliers International
Joseph	Roberts, Jr.	Columbia Theological Seminary
Kevin	Cantley	Cooper Carry, Inc.
Thomas D.	Bell, Jr.	Cousins Properties, Inc
Larry	Gellerstedt	Cousins Properties, Inc
Craig	Jones	Cousins Properties, Inc
Charles	Parker	Cox Enterprises, Inc.
Michael S.	Elting	Cushman & Wakefield
Steven G.	Baile	Daniel Corporation
Brad	Branch	Deloitte
Harold L.	Bevis	Delta Airlines, Inc.
Douglas G.	Dewberry, II	Dewberry Capital
Maxine	Hicks	DLA Piper
Alan	LeBlanc	Downtown Dining District Representative
Betty E.	Willis	Emory University
Michael	Mandl	Emory University
Sharon	Bent-Harley	Emory University Hospital Midtown
Dane C.	Peterson	Emory University Hospital Midtown
William S.	Hollett	Eola Capital
Charles	Seets, Jr.	Ernst & Young, LLP
Dennis	Lockhart	Federal Reserve Bank of Atlanta
Jack	Guyann	Federal Reserve Bank of Atlanta
James A.	Breedlove	Fernbank Museum of Natural History
Roger K.	Ouillen	Fisher & Phillips LLP
Dan	Normandin	Four Seasons Hotel Atlanta
Steven G.	Swant	Georgia Institute of Technology
Cloteen (Ms.)	Bigger-Jasmin	Georgia Pacific
Paul	Bowers	Georgia Power
Anthony	Willson	Georgia Power
Mark	Becker	Georgia State University
Mark	McDonald	Georgia Trust for Historic Preservation





A10: Key Stakeholders

A.D. "Pete"	Correll	Grady Health System
Pierluigi	Mancini	Grady Health System
Michael	Young	Grady Health System
Michael	Russell	H.J. Russell & Company
Jerome	Russell, Jr.	H.J. Russell & Company
Bill	Heitz	Heery International
Timothy S.	Holdroyd	Heery International
Kirt	Hartman	Hines Interests
John	Heagy	Hines Interests
John R.	Holder	Holder Properties
Pamela S.	Stephenson	House of Representatives
Colln	Meadows	Invesco
Bolling P.	Spalding	Jackson Spalding
Bari (Ms.)	Love	Jackson Spalding
Matt M.	Bronfman	Jamestown Properties
E. Kendrick	Smith	Jones Day
Scott	Specht	Jones Day
Wab	Kadaba	Kilpatrick Townsend
Diane L.	Prucino	Kilpatrick Townsend
Beau	King	Kim King Associates, Inc.
Lemuel	Hewes	King & Spalding
Mason W.	Stephenson	King & Spalding
Brad	Benton	KPMG
Michael	Robison	Lanier Holdings
David	Marvin	Legacy Property Group, LLC
Valerie	Ferguson	Loews Atlanta Hotel
Steven	Labovitz	McKenna Long & Aldridge LLP
Patrick	Moore	McKinsey & Company
Sam A.	Williams	Metro Atlanta Chamber of Commerce
Kevin	Green	Midtown Alliance
R. Stan	Kryder	Midtown Bank and Trust Company
Greg	Guhl	Midtown Neighbors Association
Luther C.	Curtis	Miller & Martin LLC
Louis W.	Sullivan	National Museum of Health





A10: Key Stakeholders

Benjamin O.	Brunt	Noble Investment Group
Mark C.	Toro	North American Properties
James R.	Borders	Novare Group, Inc.
Susana	Chavez	Parking Company of America
Charles	Sharbaugh	Paul Hastings
Phil	Harrison	Perkins + Will
Yvette	Bowden	Piedmont Park Conservancy
Lawrence P.	Kelly	Pope & Land Enterprises
Warren	Snipes	Portman Holdings, Inc.
David	Stockert	Post Properties
Gary	Price	PricewaterhouseCoopers, LLP
David	Smith	Regions Bank
Dan	Dupree	Reynolds Capital Group
Hampton	Mallis	Reznick Group
Scott	Selig	Selig Enterprises
Stephen	Nygren	Serenbe
Robert P.	Voyles	Seven Oaks Company, LLC
Steven L.	Kennedy	Seyfarth Shaw LLP
Shelton G.	Stanfill	Sgs Ltd.
Paul	Shallendra	Shallendra Group, LLC
John	Reyhan	Skanska
Asia	Mustakeem	Smith, Gambrell & Russell
William J.	Stanley, III	Stanley, Love-Stanley PC
Clark H.	Dean	Studley, Inc.
Henry W.	Grady, III	SunTrust
Doug	Sinclair	SunTrust
E. Jenner	Wood, III	SunTrust
B. Knox	Dobbins	Sutherland Asbill & Brennan
W. Scott	Sorrels	Sutherland Asbill & Brennan
Alan	Wise	The Boston Consulting Group, Inc.
R. Jackson	Kelly	The Coca-Cola Company
Ingrid	Saunders Jones	The Coca-Cola Company
Alicia A.	Philipp	The Community Foundation for Greater Atlanta
Egbert	Perry	The Integral Group





A10: Key Stakeholders

Martin	King, III	The King Center
James B.	Meyer	Tishman Speyer
Sallie A.	Daniel	Troutman Sanders
Mark	Elliott	Troutman Sanders
Steven	Riddell	Troutman Sanders
P. Alexander	Fraser	Turner Broadcasting System, Inc.
S. Taylor	Glover	Turner Enterprises, Inc.
Lisa	Harris	Turner Properties
Helen D.	Hatch	tvs design
Thomas	Dortch, Jr.	TWD, Inc.
Tom	Aderhold	Underground Atlanta
Mark B.	Riley	Urban Realty Partners
Edward A.	Cave, III	VeenendaalCave
Joe W.	Rogers, Jr.	Waffle House
Leonard	Walker	Wells Fargo
Leonard	Walker	Wells Fargo
S. Brent	Reid	Winter Group of Companies
Joseph R.	Bankoff	Woodruff Arts Center
James E.	Stephenson	Yancey Brothers Company

