



**CHESAPEAKE AND OHIO
HISTORICAL SOCIETY**

**STRATEGIC PLAN
JULY 2020**

COHS Strategic Plan – July 2020

Introduction

This work is the end result of input from members of the C&O HS Board of Directors, interviews with key operational staff and the staff at the Headquarters in Clifton Forge, VA. The goal is to provide overarching guidance and goals for the effective management of the Society over an extended period of time. It is not meant to be a fixed end point but rather something that should be periodically revised to reflect changes to internal and external conditions.

As part of this process a review of other strategic plans from various historical societies was conducted in an attempt to understand the key issues other like organizations have been faced with. Further, the long proven tools used by many organizations has been applied so that we can be as thorough as possible. Finally, the goals provided are done so in a way that can be measured and compared so progress and success can be readily determined.

Prepared by

Rick Gartrell, Director

gartrell@bearweb.com

843.347.7995

COHS Strategic Plan – July 2020

TOPICS

- 1. Society Vision P. 4
- 2. The Archives P. 5
- 3. Retail Sales Operation P. 6
- 4. Publications P. 8
- 5. Staff, Business Office, & Member Services P. 10
- 6. The Heritage Center P. 18
- 7. Conference and Events P. 21
- 8. External Partnerships & Opportunities P. 22

Appendices:

- A. Strengths, Weaknesses, Opportunities, Threats Analysis P. 24
- B. Heritage Center Exhibits Interpretative Plan P. 27
- C. Heritage Center Master Facility Concepts P. 38

1. Society Vision

C&O Historical Society Vision and Primary Goal

The vision and primary goal of the Chesapeake & Ohio Historical Society is to collect, conserve, restore, index, archive, and make available materials relating to the history of the Chesapeake & Ohio Railway to as wide an audience as possible. These materials are to be used to interpret the American railway experience through Chesapeake & Ohio's historical experience, using data, photographs, drawings, publications, small artifacts, and full-size railway rolling stock.

2. The Archives

Volunteer coordinator needed to support project managers and work

Develop and grow volunteers for Archives/Annex and Heritage Center

Develop and support project managers

Establish and schedule more frequent and consistent work sessions

Expand the written description of material within Archive buildings at shelf/section/ etc level

Expand shelving/storage area for material within current Annex and HQ buildings

Publish on-going project list and make available to membership

Develop and place donor plaques at or near exhibits, library and (accessible) archive holdings as may be feasible

Improved access controls on the use of archive material

Plan, design and build new archive annex facility on Heritage Center grounds to replace leased facility

- 1 year: Develop concept, cost estimate and evaluate for long-term cost reduction and return-on-investment
- 2-3 years: Plan and design finalized; bid package developed
- 5-7 years: construction complete and facility fully functional

3. Retail Sales Operation

Increase net retail sales

- 1-2 years 10% increase
- 3+ years: 2 x CPI annual growth above increased baseline

Information Technology improvements to enhance sales operations efficiency

- Improved methodologies to reduce error-prone QuickBooks and merchant account interfaces
- Advanced QuickBooks training for staff
- Methods to improve Zen Cart shopping system admin utilization and reduce errors

Develop Chessie themed website for cat lovers

- History of Chessie ad campaign
- Art work from ads
- Chessie and cat related products (subset of Chessie shop)

Extend Chessie Shop model products to transform it into the source of all things C&O modelling related

Improve product marketing to capture a broader audience

Engage modelling and rail-fan community

- Ebay and Facebook Marketplace sales
- Sponsor/support/attend as vendor at regional Railroad Prototype Modelers events

Develop and test alternative product development

- 3-D printing technology for unique items
- Printing on demand for low volume COHS publications
- More electronic publications (CDs, DVD and down loaded)

Select products best suited to third party website sales (example Amazon, Walmart)

- Document 3rd party website processes
- Develop/extract routine reporting of 3rd party sales

4. Publications

Develop new or updated COHS hardbound/softbound books

- Examples currently under consideration: Postwar C&O Passenger Service; Comparison of C&O and N&W Locomotive Programs; How a Steam Locomotive Works (updated)
- Other topics: C&O – Industry focus such as steel mills, lumber/paper, chemical plants; C&O - City focus. Some may be better suited to History Series. C&O in Advertising – Chessie and more.

Publish non-railroad audience books with C&O theme

- Children: “ Chessie Takes a Train Trip”
- Adult: The Wright Brothers Travel on the C&O Railway; C&O History in Postcards

Continue History Series Books

- 2020 and beyond
- Convert to annual recurring renewal with buyer opt out (annual notice required)
- Establish and keep on time delivery schedule

Develop annual report to include accomplishments, plans and summary level financial data

- First distribution at annual conference; subsequent upon member request
- Can be used as boiler-plate material for grant applications
- Use as handouts when visiting new grant organizations

Reinvigorate the Basement Sub-division portion of the magazine

Review/revise/update print publications before second/third/fourth printing as may be reasonable

Continue News Release Program

Select existing publications for companion CD material publication

Publish C&O and Chessie Calendars for 2020 and beyond

Develop and publish new brochures

- Membership opportunity (Chessie Wants You)
- General information about COHS
- Heritage Center for tourists/visitors

Develop publication support/standards packet for new COHS magazine authors

5. Staff, Business Office, & Member Services

5.1 Financial Goals

Note: Use FY 2019 as baseline values. All goals are inter-related and generally should not be achieved in isolation from each other.

Increase cash reserves

- 1-2 years 10% increase;
- 3+ years 2 x CPI annual growth above increased baseline

Decrease long term debt

- 3-5 years: 50% reduction from current level
- 6-8 years: 80% reduction from current levels

Increase net retail sales

- 1-2 years 10% increase
- 3+ years 2 x CPI annual growth above increased baseline

Expanded contribution programs

- Sustain baseline to support operations (\$69 K/year)
- Additional received contributions to reduce debt and fund additional programs
 - \$60 K/year for each of next 5-10 years
- Donor recognition events, certificates and so forth needed

Increase grant applications/awards

- 1-2 years: \$15+ K per year
- 3+ years: \$25+ K per year
- Develop 'boiler plate' material for grant applications/proposals
- Develop sources and schedules for grant applications
- Develop ongoing, annual financial data suitable for grant applications/proposals

Increase advertising budget by 50-75% within 2 years and sustain

Dramatic increase in Heritage Center building maintenance

- Required for urgent repairs (HVAC, heating, building repairs)
- Increase normal budget allocation by 50-100%

5.2 Business Operations

Information Technology Enhancements

- Staff training/cross-training with adequate software documentation
- IT Disaster Recovery Plan – test and validate
- System, software and network documentation
- Improved methodologies to reduce error-prone QuickBooks and merchant account interfaces
- Advanced QuickBooks training for staff
- Plan for hardware/software evolution and replacement
- Explore support contractor alternative to volunteer and/or internal staffing
- Increase and sustain IT hardware/software funding

Quick Books utilization improvements

- Review/validate Quick Books accounts setup; revise as needed
- Develop new or required reports
- May need to delegate aspects of these improvements to external firms

Engage in Business Process Improvement (BPI)

- Analysis, review, and improvement of existing business processes including day-to-day functions
 - Reduce time to complete project/activity
 - Improve the end result
 - Reduce or eliminate wasted effort
 - Document process and plans; test and refine as needed

Document normal and planned annual HQ project schedules (see BPI above)

Re-establish and maintain quality external relationships

Review and implement changes to Financial Control Policies as needed

- Assure proposed major project expense and like financial commitments are documented and distributed to Board Members as needed prior to approval cycle.

- Increase required expenditure approval for major projects to 66% of BOD members
- Increase approval cycle time to 3 business days, exclusive of emergency needs
- Implement signed Proxy authority methodology
- All project managers/leaders shall include cost reporting and tracking in reports to BOD

Review retail product inventory and determine what is not sufficiently stocked and what is overstocked. Restock or dispose of excess as may be warranted.

5.3 Facility Operations

Develop HVAC and other equipment/systems maintenance, repair and replace schedules

Complete urgent Heritage Center buildings repairs and repainting

Public and volunteer safety risk assessment/reduction at Heritage Center

Test and implement IP-based video monitoring of Heritage Center grounds

- Compare to contractor service alternative

Re-evaluate fire alarm, fire suppression and security systems at all COHS facilities

Develop volunteer safety briefings and/or guides

Plan for impact of possible AMTRAK station facility at the Heritage Center

Develop and place donor plaques at or near all exhibits, library and (accessible) archive holdings as may be feasible

Collaborate with Clifton Forge School of the Arts to develop designs for improved Heritage Center fencing, outdoor display murals and supporting art work

Determine if AmeriCorp and other community service organizations/groups can assist on projects

Add public electric vehicle charging station to Heritage Center parking area

- Technical feasibility and selection study complete
- Make free to Clifton Forge locals
- Small use fee for visitors

Negotiate extension to Archives Annex lease for beyond 2020

- Minimum 2-3 years extension desired

5.4 Volunteers

Develop/grow volunteers at Heritage Center and Archives/Annex

Develop 'project managers' and enable scheduling, tools, financial support and other capabilities

- Develop project guidelines
- Periodic reporting and reviews to BOD
- Develop project work packets (schedules, activities, etc)

Establish and train volunteer coordinators

Membership skill/interest survey

Develop/create COHS education/entertainment programs for volunteer work sessions

5.5 Staff

Develop key staff contingency and transition plans including knowledge base transfer (see BPI earlier in this section)

Develop and support staff training and cross-training for skill enhancement

- Online courses
- Local community college course work
- Manuals and documentation

Implement employee development process as part of performance review cycle

Implement performance review cycle and documentation

- Determine appropriate 6-month and 12-month reviews by either of salary range or position type

Review benefit and insurance package offered to employees

- Compare to industry and like-size organizations
- Explore and implement cost-effective enhancement options

Document typical or routine processes

- Avoid key information 'silos'
- Examples would include sources to answer public inquiries; scheduled publications; etc.
- Correlation between physical locations of archived docs and collection guide descriptions.

Develop possible role for grant writer for entire COHS organization

- Direct report to executive director or President and Board of Directors
- Define responsibility in detail using other like organizations as a model
- Must have employment contract and can be fired by action of executive director or of President and/or Board of Directors

Create "Family" feeling through communal activities (dinners, lunches, staff retreat, etc.)

Hire part time staff to help with shipping and inventory during seasonal periods

Consider day-laborers for painting and renovation tasks at Heritage Center

5.6 Member Services

Increase membership base

- 2 year growth goal: 10% above current
- 3-5 year growth goal: sustain at 3-5% growth per year over two year goal

Develop membership recruitment materials

- Brochures to attract new members
 - Distribute at key regional locations
 - Distribute at Virginia Rail Corridor venues (need to reciprocate)
 - Distribute at regional rail fan and model railroading venues
- Implement in-house advertising program (oversize postcards) for products/services
- Identify cost-effective publications for selected recruitment ads
- Publicize annual conferences in local conference area

Establish and schedule more frequent and consistent work sessions:

- Minimum Quarterly work sessions at Archives
- Minimum Bi-monthly work sessions at Heritage Center
- Develop 'project managers'
 - Enable them with tools to schedule, obtain tools & materials, obtain financial support
 - Develop project guidelines, including who makes decisions/selections for various aspects of a project
 - Require periodic report to BOD
- Establish and train volunteer coordinators for projects at Archives and Heritage Center
- Semi-annual progress report on work sessions to BOD
- Include mini-convention –like activities to work sessions to help enable further participation

Develop post-annual conference report/article feature

- Publish long version in COHS magazine for members
- Publish synoptic version within email newsletter
- Publish short summary version on social media

Develop annual report to include accomplishments, plans and summary level financial data

- First distribution at annual conference; subsequent upon member request or via website access
- Can be used as boiler-plate material for grant applications
- Use as handouts when visiting new grant or other organizations

Sponsor/support/attend as vendor regional Railroad Prototype Modelers events (RPM)

- Opportunity to establish RPM meet in Covington or Lewisburg

Develop member feedback/concerns input methodology to BOD

Improve Board of Directors communication with general membership

Distribute strategic plan and other like documentation to membership hardcopy and from access limited portions of website

- May need to remove some or all of personnel related goals

Membership survey

- Every other year or 3rd year cycle
- Focus on membership skills and interests

Sustain schedule of COHS magazine and email newsletter

- Identify possible article/authors from annual conference
- Develop new author information/preparation packet

COHS Website/Internet Media improvements

- Add “what’s new section”
- Review existing images/document captions and notes making corrections and additions as needed.

- Improve archive search capability with features such as pagination, relevance ranking, year (not year added), and others as may be identified
- Social media feed
- Social Media presence continuous improvement including identification, review and evaluation of evolving technologies
- Member only content (access control required)

Major Donation Acknowledgement

- In addition to display placards and certificates, include notes in CHOS magazine and newsletter

6. The Heritage Center

Develop HVAC and other equipment/systems maintenance, repair and replace schedules

Complete urgent Heritage Center buildings repairs and repainting grounds

Create and appoint a board committee to specifically oversee the operations and programs of the Heritage Center

- Membership should include a few key board members and a representative of the Clifton Forge community
- Most members should have 'curator' knowledge and/or backgrounds to guide Heritage Center programs, exhibits and preservation projects
- Periodic reports to the COHS Board required
- Provides financial recommendations to the COHS Board
- Review and finalize interpretative plan for the Heritage Center exhibits (See Chesapeake & Ohio Historical Society, Inc. - Interpretation Plan - Revised 1/6/19 as an example)
- Establish a comprehensive vision for the Heritage Center exhibits

Develop master building plan for the Heritage Center (see examples)

- Plan, design and build new archive annex facility on Heritage Center grounds to replace leased facility
- Protected shop/repair building
- Train-shed like enclosures for equipment display areas
- Added track(s) to allow growth in restored equipment display and better utilization of restored cars for groups and special events – see 2012 Expansion Project Plan document.
- Rotating displays for freight depot

Appoint a Fund Raising Committee to:

- Identify companies, foundations, individuals and government entities capable of grant making.
- Prepare grant applications relevant to the Heritage Center's needs

Develop and maintain project plans for all restoration projects

- Historical significance narratives (useful for grant applications)

- Accurate budget estimates and cost accounting
- Progress reports and final reports for grant/funding sources

Expand holiday programs to attract families (example Labor Day 'Off the Rails') and continue to market Heritage Center as a venue for groups and parties

Need equipment descriptive display placards including options for interactive displays features and virtual reality/immersive experiences

Develop and place donor plaques at or near all exhibits, library and (accessible) archive holdings as may be possible

Review 'ride-on' scale train operation

- Equipment maintenance improvement
- Additional track and sidings
- Scale buildings
- Engage large scale club to suggest improvements

Develop material/programs for use in elementary and secondary school classrooms and libraries

- Identify grant resource(s) for developing programs/project/publications best suited to Virginia education standards at various grade levels
- Develop field-trip programs consistent with grade level standards
- Distribute information to regional schools about these opportunities

Public and volunteer safety risk assessment/reduction at Heritage Center

Test and implement IP-based video monitoring of Heritage Center grounds

- Compare to contractor service alternative

Re-evaluate fire alarm, fire suppression and security systems at all Heritage Center facilities

Heritage Center grounds cleanup and organization

Review equipment at Heritage Center and archives for disposal/sale

- Duplicate signal masts already selected

Non-CSX on-site equipment moves

Add public electric vehicle charging station to Heritage Center parking area

- Technical feasibility and selection study complete
- Make free to Clifton Forge locals
- Small use fee for visitors

C&O Oral History Project

- Develop questionnaire(s)
- Develop release document
- Select multiple qualified interviewers
- Possible university or other outside group collaboration

Collaborate with Clifton Forge School of the Arts to develop designs for improved Heritage Center fencing, outdoor display murals and other supporting art work

Determine if AmeriCorp and other community service organizations/groups can assist on projects

Revitalize and expand Douthat State Park and other local camp ground marketing

- Information brochures
- Discount admission to Heritage Center

Establish joint-marketing with Virginia Rail Heritage Region museums

- Reciprocal brochure exchange
- Develop self-guided history tour
- Joint programs

Develop detailed plan for possible AMTRAK station using part of Heritage Center facilities

7. Conference and Events

Develop annual conference proceedings

- Use power point (or like) publications as delivered by presenters
- Include with agenda and publish as a DS –like document
- May want to exclude slide-show presentations due to conversion complexity
- Select better quality presentations for development into COHS magazine articles

Expand programs to attract families to Heritage Center

Develop regional COHS mini-conference concept

- Select 2 -4 'regions' to hold quarterly or semi-annual weekend meetings at 'drive-to' locations
 - Select mix of geographic regions that are well represented at annual conferences and those with poor attendance at annual conferences so comparisons can be made
 - Identify volunteer organizers
 - Presentations to include slide shows, COHS regional artifacts/displays, short presentations, models and social interaction
 - Must be open to the public
- Develop 'official' COHS material that can support the concept including membership recruitment material
- Organizers provide synoptic reports to BOD or a designated mini-meet coordinator

Develop and implement virtual/remote conference capability

8. External Partnerships & Opportunities

Revitalize COHS relationship with county, state and national elected officials; government agencies that support tourism; and corporate partners such as CSX

Re-establish positive relationship with City of Clifton Forge

Revitalize COHS relationship with Alleghany Foundation

- Visit Executive Director with key BOD members; emphasize contribution to Clifton Forge and surrounding area – we are more than just a historical society

Develop and implement Intern Program

- Target local Dabney Lancaster Community College, Clifton Forge

Revitalize and expand Douthat State Park and other local camp ground marketing

- Information brochures
- Discount admission to Heritage Center

Develop Boy Scout Rail Road merit badge program using C&O as the basis

Identify other rail road and historical restoration foundations/organizations with grant opportunities

Establish relationship with other regional railroad historical societies, related museums and tourist train operations

Establish relationship with railroad photography organizations such as the Center for Railroad Photography and Art.

- Publish article(s) in membership magazines

- Present at conferences/meetings
- Cross-reference collections within each organization's membership

Develop ways to, or projects that can, utilize the talents of service groups (example, AmeriCorp)

Develop relationship/projects with/for local welding students at Lancaster Community College to help in restoration projects

Develop new marketing concepts to attract railfans to the Heritage Center

- Example: US 220 as the Railfan Road (see September 2019 Trains magazine)

Working with CSX, Clifton Forge, and so forth, develop plans for possible AMTRAK station at Heritage Center facility

Appendix A: Strengths, Weaknesses, Opportunities, Threats Analysis

STRENGTHS

- Very large collection of drawings, maps, books, corporate documents, equipment and artifacts from the C&O and predecessor companies, plus broader railroad related resource material.
- Publications
- We research and answer questions from any source just not members, including the UN, BBC, various TV channels and more.
- C&O Heritage Center Museum with hands-on equipment collection, buildings and displays

- Retail shop (Heritage Center and Online)
- Relationship with CSX
- Serious-minded Board of Directors
- The COHS 'Brand'

- Strong, positive, forward-looking management
- One of the few single railroad historical society's with paid staff
- Dedicated volunteer IT expert
- Volunteers

WEAKNESSES

- Number of volunteers supporting archive projects/functions
- Number of volunteers participating at Heritage Center restoration/service projects
- Decaying equipment at the Heritage Center
- Few publication authors

- Aging membership and management
- Lack of volunteer coordinator(s)
- Strategic plan and consistent vision/direction not always evident
- Heritage Center facility plan for covered pavilion, buildings, track plan needs (re)development

- Lack of accountability and communication
- Some staff not adequately trained
- Staff cross-training
- Not enough face-to-face board meetings

OPPORTUNITIES

- Expand efforts for grant applications
- Relationship with local municipal governments, state and national elected officials and governmental agencies that support tourism, CSX, and the Allegheny Foundation
- Develop cooperative projects with local art council, local colleges and local business community
- Programs to attract families and younger adults

- Recruit external parties who are influential in the business and general community to become general members or members of advisory committee or board members
- Quick response to marketing opportunities (example, US Rt. 220 Rail Fan locations)
- Staff cross-training

- Re-invigoration of Virginia Rail Heritage Corridor museum marketing
- Presence on or with regional train excursions
- Information resources to support C&O related historical building renovations.

THREATS

- Lack of financial resources to fund operations, reduce debt, improve cash reserves, technology and equipment, maintain facilities and restore equipment
- Transition plan for key staff
- Key processes not documented and key operational information 'silos'

- Membership growth/retention
- No grant writer
- Inadequate volunteer work sessions

- No executive director
- Lack of non-profit experience on Board of Directors
- Replacement/transition for equipment and artifacts on loan

Appendix B: Heritage Center Exhibits Interpretative Plan
(This material is extracted from the COHS Fact Book)

Themes:

THEME 1: EISENHOWER, THE C&O, AND THE COLD WAR

This theme is to be supported by the recent acquisition of the ex-C&O business car Chessie 29 sometime in 2019. This car was used to transport President Dwight D. Eisenhower from Washington, D. C. via C&O to White Sulphur Springs, West Virginia, for a conference with the Prime Minister of Canada and President of Mexico at the C&O-owned Greenbrier Hotel in March, 1956. A secret sub-set of this trip was that Eisenhower met with C&O President Walter J. Tuohy and they agreed on a plan by which the Greenbrier would build a new wing to the hotel and beneath it would be a state-of-the-art shelter/ bunker for use by the U.S. Congress in the event of a nuclear war and the evacuation of the government from Washington. The Greenbrier had been a C&O-operated property since in 1910.

The plan for this evacuation remained in effect and the bunker secret, disguised as part of the Greenbrier Hotel, until a Washington Post news reporter revealed its existence in 1992. After that it was deactivated as a federal installation, and over the next decades became a curiosity and relic from the most dangerous days of the Cold War and “Mutually Assured Destruction” by nuclear exchange. The “Greenbrier Bunker Story” has been covered by scores magazines and TV shows down to the present time (2019), and the hotel now conducts tours for guests and the general public.

The purpose of acquiring Chessie 29 is for use as the principal artifact in explaining and interpreting the C&O’s part in this important clandestine operation that was an integral part of the U. S. government’s nuclear war contingency planning. The car has been acquired and as of February, 2019 was pending movement to Clifton Forge. It will be restored in stages, as resources are available, to its appearance as it was in 1956, when it was the car assigned to C&O President Walter

J. Tuohy on a regular basis and was used on the Eisenhower special train during the Greenbrier trip. It can also serve as a lead-in for further interpretation regarding American railroad support of military operations from the Civil War through to the Cold War. This can be accomplished by installation of static displays in the car and in nearby facilities. This display is to be linked to Theme No. 2 (see below). The C&O and American railroads’ connection with the Cold War can be one of several interpretative themes that the C&OHS can advertise to attract attention and visitation to its Clifton Forge Heritage Center.

Chessie 29 was originally built in 1950 by Pullman-Standard Car Manufacturing Company as 5-Bedroom/Buffer/Lounge/ Observation Car named New River Club. It was converted in 1951 to a business car for use by the C&O president and was retired in 1971 at which time it was sold to Wildwood Center, Pittsburgh, Pa. It was subsequently owned by Burrell Construction Company of Kensington, Pa., and finally to other private parties from whom C&OHS has acquired the car by donation. It is a “lightweight” streamlined car with half fluting of stainless steel on its sides, and a blunt end observation section. It has been redecorated inside.

The interior and exterior are both planned to be returned to their 1950s appearances as resources are available. The car is a donation by its last owner, Mr. Al Barbour. It can be expected that large artifacts such as Chessie 29, having connection with a major American historical figure such as Eisenhower and an important event in the Cold War epoch would have considerable appeal for visitors far beyond those interested strictly in railway history. It can establish an avenue to connect railway operation with

ordinary people and with major historical themes. For these reasons the acquisition and eventual restoration of this car can be expected to increase the viability of the C&O Heritage Center and increase visitation once its presence is made known and advertised.

THEME 2: THE C&O AND AMERICAN RAILWAYS FIGHT WORLD WAR II

This theme is to be exemplified by use of C&O flat car No. 80435 currently in the C&OHS Heritage Center collection, enhanced by loading it with old military vehicles, if such can be obtained. The car was built in 1937 and would have been of prime importance to C&O as it carried vehicles such as these in great quantity from places of manufacture in the Midwest (particularly Michigan) to the “Hampton Roads Port of Embarkation” at Newport News, Va., during the war. Though only one car, a series of static and rotating displays can be mounted nearby that interpret the C&O’s strategically key logistical role in support of American participation in World War II. Because C&O linked the coal fields of West Virginia and Kentucky to major industrial locations in Ohio, Indiana, Michigan, and via connections with the whole industrial complex of the Northeastern/Midwestern United States, it was a prime carrier of high-grade metallurgical coal used to manufacture war materiel. Likewise, its main line was ideally situated to carry materiel and troops to the Hampton Roads Port of Embarkation, which served as one of several ports for transshipment to the European Theatre of Operations.

Since there was no staging location close-by, “Operation Torch,” mounted in 1942 to liberate North Africa, was launched directly from Hampton Roads. C&O was a key railway in transporting troops and materiel to this port, which were marshaled in ships in Lynnhaven Roads, Va. and dispatched directly to North Africa. Later, as Great Britain became the staging area for the invasion of Northwest Europe on D-Day, June 6, 1944, C&O supplied transportation for large numbers of troops and a great amount of materiel for that operation. C&O had requisite facilities at Newport News for the transport of men, goods, animals, and vehicles destined for the European Theatre of Operations. During the war C&O operated more than 1,000 extra troop trains per year. War goods and vehicles were carried in regular freight trains as well as extras as needed. During the war C&O acquired new flat cars to supplement its fleet. They were largely employed for military vehicle transportation.

C&O flat car No. 80435 was built by in 1937 for general use. C&O used such cars for farm machinery, industrial machinery, lumber, and other loads which could not be fitted in box cars and were inappropriate for haulage in gondolas. During World War II it was probably most often used for transportation of military and naval vehicles and machinery. After the war C&O had a surplus of flat cars, many of which were converted to specialty cars for carrying particular industrial products.

This car survived as an ordinary flat car and was eventually retired and used in company work train service to carry rails, machinery, ties, and other material used in railroad maintenance-of-way. It is from this service that C&OHS acquired the car.

To complete the display, appropriate military vehicles need to be obtained by acquisition, loan, or lease. These vehicles can be mounted on the car to illustrate the wartime traffic. The study of World War II is one of the major themes in American history since that conflict was the defining event of the 20th Century, and the results from it have shaped our lives today. Although little survives of specialty equipment that can be used to interpret the 1941-1945 era on the C&O, the flat car mounted with military vehicles can offer both a visual and hands-on opportunity to interpret the era with emphasis on how important American railroads were to the war effort. Ample materials exist to prepare interpretative panels which can explain the American railroad experience during the war with emphasis on the C&O. Because this is so important as a theme, and attractive to many people well beyond those interested mainly in railways, it should be a viable attraction to increase visitation at the C&O Heritage Center. The interpretation of World War II can lead directly to the interpretation of the Cold War with Chessie 29.

THEME 2-A: WORLD WAR II INTERPRETATION (ADDITIONAL)

To further support the theme of railroading in World War II, the C&OHS Collection has in a former Pullman Troop Sleeping Car. These cars were constructed using box car bodies with high speed passenger trucks and springing. They were operated to carry troops during World War II and the Korean War when the existing stock of sleeping cars proved inadequate.

They were operated and staffed by the Pullman Company and were generally used in solid trains carrying troop units to and from training camps and to ports of embarkation. As such they would have been used on the C&O in the later stages of World War II and in the return of troops from the European Theatre of Operations in the two years immediately after the end of hostilities. The cars were Spartan in appearance and accommodation, with troops bunked in simple berths three high. Because the cars were surplus after the war, many were sold to railroads for use as camp cars and tool cars for maintenance-of-way (MofW) forces. The C&O used the car in the C&OHS Collection for MofW use as a rider car for the Clifton Forge wreck train.

Because the car in our collection was completely gutted and rebuilt inside by C&O for MofW forces, it can now be used for interpretation in two ways: (1) A single set of bunks can be established at one end of the car which will represent the living accommodations for troops. Additional space in this area can be allocated for static displays showing railroad operations in World War II and Korea with emphasis on C&O participation. (2) The other end of the car can be devoted to artifacts and static displays illustrating how the car was used in its later life as a Maintenance-of-Way car for C&O forces, including a history of this function on the railway, display of photos, tools, etc. The exterior of the car can be painted Pullman green and lettered Pullman, for an additional visual display representing World War II.

THEME 3: COAL AND THE C&O

The most important aspect of the C&O is its haulage of coal. Once known as the “Coal Bin of America,” C&O was the largest originator of bituminous coal in the world in the 1940-1960 era. Its coal was extracted from rich fields in southern West Virginia and eastern Kentucky and was transported both east and west. It included high grade metallurgical coal for use in steel making as well steam coal for power plants and export. The development and operation of the C&O after 1885 up to its merger into CSX in 1986 is directly related to coal. Coal transportation usually accounted for about 70% of the railway’s income in the middle years of the 20th century. Its motive power policies, construction of branch lines, and almost every aspect of its operations centered around the movement of coal. However, no thought was given by the railway, by museums, or by the C&OHS to locate and save typical 50-ton coal cars which were the backbone of the C&O fleet during the high era of coal transportation during the 20th Century. Therefore there are none in our collection. Today there remain only a couple of possibilities:

- (1) Acquire a more modern hopper car as the final development of the fleet and use it as the visual key to a more detailed display on C&O and coal.
- (2) Acquire one of two 50-ton C&O cars reportedly remaining, owned by the operator of the Durbin & Greenbrier Railroad. These cars were last seen stored at Durbin, W. Va.
- (3) If possible, try to acquire a very old C&O hopper car (ca. 1917) that apparently exists in a museum in the Michigan area (POC: Al Kresse).
- (4) Or a combination of these.

The importance of coal for the C&O is a given. The lack of interesting representative cars or other large artifacts that could be used as displays makes it difficult to mount interpretation, so it will have to be done by museum panels and other types of visual arrangements.

No interpretation of the C&O can be complete without exposition of its main commodity of transport: coal. Although this does not have a wide interest among the general public, it is an indispensable ingredient in the overall C&O story and the character, development, and iconography of the railway and its region in the Virginias, Kentucky, and Ohio. The coal culture also ties into the milieu of “Appalachian” culture, which can be exploited and to which connections can be made through use of panel photos, documents, and most especially photographs. Because of the lack of artifacts and because the nature of the business, it is indispensable for the Heritage Center, but not a highly attractive advertising tool.

THEME 4: C&O PASSENGER SERVICE

Because passenger trains were the most public aspect of C&O, were best known to all levels of the public, and were used by almost everyone, passenger equipment and artifacts have the greatest ability to connect directly with people's lives. Trains were essentially the only means of long-distance transportation until the rise of mass-produced automobiles and good roads in the 1920s-1930s and remained the principal long-distance carriers through World War II. Passenger service rapidly declined after the war as good roads, motor buses, family cars, and airlines came to dominate passenger transportation. Through there were 10,000 intercity passenger trains in 1950, there remained only about 300 when Amtrak, the quasi-governmental corporation, assumed American passenger train service in May 1971. The C&O was a freight railroad and more particularly a coal-hauling railroad, it, however, had a high-class and high-profile passenger service. It is interesting to note that passenger transportation in the mid-20th Century (ca. 1948) accounted for less than 5% of the railway's total income. C&O's passenger service history is important because:

- (1) It connected some major cities: Washington, Cincinnati, Norfolk/Newport News, Richmond, Charleston, Huntington, Louisville, Columbus, and Detroit, with through cars. It had further connecting service to Baltimore, Philadelphia, New York, Cleveland, and Boston in the east and Indianapolis, St. Louis, and Chicago in the west.
- (2) C&O made an early effort to provide the best possible trains between its major terminal points, usually buying the latest developments in both motive power and cars. Its management took great pride in the service and gave it far more attention than its relative importance to the company would have indicated.
- (3) It handled business from the eastern cities to the Virginia and West Virginia mineral springs (known as the "Springs Trade") and it was widely known by important people since many visited the springs. The "springs" consisted of a dozen such resorts at the turn of the 20th Century, but by the 1930s the business was concentrated almost exclusively at White Sulphur Springs, W. Va. (the Greenbrier Hotel, built and owned by C&O after 1910-12), and Hot Springs, Virginia (the Homestead Hotel, built and operated by C&O's president M. E. Ingalls (1890-1900), and later operated by his descendants).
- (4) In the mid-20th century, under the leadership of Chairman Robert Young, C&O became one of the strongest advocates in the country for improved passenger service to meet the competition of other modes, and pioneered many aspects that later became regular in the service: toll-free central reservations, movies on the train, credit cards, hostesses, lower-center-of-gravity trains, etc.
- (5) C&O's passenger trains and then the railway itself became widely known nationally through its Chessie kitten passenger travel advertising symbol.

For these reasons and others, C&O's passenger service cuts a much larger figure in American passenger train history and consciousness than its relatively small service (when compared with great passenger carriers such as NYC, PRR, AT&SF, B&O, UP, CB&Q, etc.) would seem to require. Almost all books on passenger trains mention The George Washington, and often its companion trains, The Sportsman and the Fast Flying Virginian, as high-quality American trains. The novelist Jesse Stuart called The George Washington "The Great American Train." When C&OHS began collecting large artifacts, it concentrated on acquiring passenger train equipment, and as a result now has a representation that covers the era 1926-1970, with both cars of the heavyweight era (pre-1950) and the lightweight car period (post-1950). Some of these cars have been restored and have been used for several decades as artifacts for interpretation. This has been true especially for the dining car No. 965, Gadsby's Tavern, which is restored to its 1932 George Washington appearance inside and its post-1950 modernized appearance outside. Combination car No. 458 is likewise used to illustrate coach accommodations, the "Jim Crow" racial segregation laws of the 1900-1960s era, as well as baggage, express, and mail handling. It has a modernized passenger compartment, original baggage/express/ mail area inside and is painted to post- 1950 colors outside. It was used in its last 20 years of service on the Hot Springs branch taking Pullman sleepers from the large cities to the resort from Clifton Forge. The collection contains a typical 1950-built lightweight C&O 10-Roomette/6-Double Bedroom sleeping car to be used to illustrate Pullman (sleeping car) service (roomettes and bedrooms).

C&OHS has in its possession additional cars not yet restored which will be used to continue the interpretation of passenger service. The collection needs most the following cars in order to round out the passenger service story: (a) A heavyweight sleeping car of some configuration. No heavyweight Pullman cars that were assigned to C&O regularly are still in existence except one, which is too deteriorated to consider however C&O operated Pullman "pool" cars. These cars had a uniform appearance over all railroads and many examples survive in museums and other collections. (b) A "head-end" car that has a Railway Post Office "apartment" in it. All C&O RPO cars are gone except for the possibility of one with a 15-foot apartment car that is in the Illinois Railway Museum, and possibly another one that has a 30-foot in RPO apartment that is being used on a tourist railroad in the Northeast. These need to be investigated. This type car is needed to interpret the "mail by rail" aspect that was so important in creating the best postal service in history.

Passenger cars lend themselves ideally to interpretation because visitors can walk through and sit in them. The docent can explain in a hands-on manner how the car worked, when it was built and why, how and when it was used by C&O, how this was similar to other cars on other railroads, and the vastness of the whole railway passenger transportation system and how it worked. The dining car can be used for illustration of the elegance, even in the later years, that attended passenger train travel; the combination car allows for interpretation of coach seating, the "Jim Crow" segregation laws of the South, as well as baggage, mail, and express handling. Recent restoration of the lightweight 10-roomette/6-double bedroom Pullman sleeping car City of Petoskey shows how people traveled overnight in bedrooms and roomettes in the post-

WWII era. The yet-to-be-acquired heavyweight sleeping car can be used to show how relatively crude accommodations were before the streamlined lightweight all-room cars by showing upper and lower berths, etc. The express car (now in the collection) is to be restored to its proper green/gold lettering appearance so we may have a car of that livery. Since it is gutted inside the space can be used for multiple subjects of interpretation. The yet-to-be-acquired apartment RPO/express car can be used to illustrate how the railway handled the mail and the express packages in perhaps the most efficient manner in history. If this car is not acquired this interpretation (minus an RPO section) will have to continue to be handled in the combination car.

THEME 5: "THE GREAT CONNECTION"

This is the idea that became current in colonial Virginia that envisaged the creation of a transportation system that would connect Tidewater to the interior of the North American continent. In that era, long before the invention of the railroad, water was understood to be the best way to inexpensively move large numbers of people and goods/raw materials. Therefore, the early idea was to build canals that connected rivers and eventually led to the navigable waters of the Ohio and Mississippi systems (the "Western Waters"). For this reason, George Washington became first (honorary) president of the James River Company in 1785. Eventually it became the James River & Kanawha Canal that was built across Virginia from the Fall Line at Richmond to the base of the Alleghenies. Washington was also interested in ways to exploit the known natural resources of the continental interior. When railroad technology began to supplant canals in Virginia, the Virginia Central (C&O's lineal ancestor company) built from Richmond through Charlottesville and across the Blue Ridge and Shenandoah Valley, reaching present day Clifton Forge in 1857. In 1868 this line became the Chesapeake & Ohio and was extended to the Ohio River. From it grew the C&O of the mid-20th Century serving six states and one Canadian province with over 5,000 route miles.

In the 1930s C&O began calling itself "George Washington's Railroad." It purchased the Richmond & Alleghany Railroad in 1890. Because this railroad had built a line along the towpath of the old JR&K Canal in the 1880s, C&O saw itself as the final completion of the Great Connection that had been so dear to Washington's heart. Indeed, it was. This Great Connection that allowed the coal, forest, agricultural products, ores, and other raw materials to be carried from their origins in the interior to the places of manufacture and commerce and then carrying back finished goods can be used to illustrate not only the importance of the C&O to its region but of railroads to America. This can be used as the avenue to show how railroads, more than any other single agency, created the modern industrial and technological world in which we live. It can be illustrated how railroads stand in the technological void between the invention of the wheel and the invention of the computer. In this program of interpretation, the C&O serves as an example and archetype for American railroads in general. Illustrative displays and materials developed can draw broader conclusions from the example of the C&O.

The interpretation of this theme can be accomplished by museum panels, models (such as the canal lock model now on display and our O-scale railroad layout), documents and photos. No large artifacts are available which illustrate this. A bateau boat replica of those used on the JR&K Canal is in the collection (though in deteriorated condition) can be used as the connection between the canal and the railroad. Most of the materials and panels explaining this are already in place in the freight station museum portion of the Heritage Center. Little additional expense or effort will be needed to round out this display. The relevance of this to the regional interests of Virginia and West Virginia and in the development of America as an industrial giant can be used to instruct school children, people with historical interests, and to a very broad audience which is no longer cognizant of the importance of the railroads in modern history.

THEME 6: C&O RAILWAY OPERATIONS

This interpretative theme focuses on the actual operation of the C&O (and by inference railroads in general), including stations/depots, signal systems and structures, Maintenance-of-Way, construction and engineering, freight operations, and the technology of railway equipment. The artifacts needed for this theme are the existing original C&O Clifton Forge freight station (built 1895), the replica passenger station and JD Cabin signal cabin (tower), both of which were built by C&OHS as exact replicas using original drawings. Half of the troop sleeping car (see Theme 2A above) is also to be used for the Maintenance-of-Way (MofW) operations, as well as the tool house, tools, handcar (lever car), velocipede, motor car, trackside telephone, and track-work tools (all of which are present in the C&OHS collection). The replica station (depot) building on the Heritage Center grounds illustrates the typical public-C&O interface through its passenger waiting room as is an exact replica of the 1890 passenger station for Clifton Forge. It was located only about 200 feet from the new replica structure. The earlier signal systems can be illustrated by the existing replica JD Cabin tower installed with a switch lever plant, as well as the cantilever signal bridge and single masts (currently lying in the east end of our yard). Included in the tower will be a telegraph sounder and key, scissors telephone, train order stand, and lever plant (one is possible from a party in Marion, Ohio, currently being explored), as well as panels mounted in the second floor of the tower illustrating typical C&O tower interiors of different eras. If possible, the cantilever signal tower and single mast signals can be electrified and connected to an activating instrument (replica small centralized traffic control panel).

C&O water operations can be illustrated by the erection near the track of the Poage design Water Column currently in our yard (which came from the passenger station area at Clifton Forge). It can be positioned next to any steam locomotives in the display to show how water was dispensed to tenders. A panel will describe the importance of water operations on the railway.

Less-than-Carload (LCL) freight will be illustrated by using one of the two 50-foot steel box cars in our possession, which will be positioned either next to the freight station platform or at another purpose-built platform, showing how package freight was moved. Panels will treat typical C&O LCL freight stations in operation. The wooden-sided box car, once rebuilt, can be used to illustrate other freight operations, with the possibility that a double door can be installed to show how automobiles were hauled in box cars before the invention of the auto-rack car in the early 1950s. This should have a wide public appeal.

The working conditions of railway workers and the operation of freight trains will be interpreted using the four cabooses we have, two of which have fully restored interiors and exteriors. Additional panels mounted inside these cars can show how they were used in train operations. They are excellent hands-on artifacts, and children will be especially interested to sit in the cupolas.

C&O operations (serving as an archetype for railroads in general) can show visitors many aspects of how life worked in the Railway Age, such as: businesses and people getting package freight by rail (LCL), going to board passenger trains (station waiting room and ticket office), functioning of freight stations, and haulage of bulk commodities, etc. Illustrative panels can be developed and created to complement these functions. Many, indeed most, people living today have not had contact with the railroad in these ways and have no concept how packages arrived at homes before UPS and FedEx (that is, by Railway Express, LCL freight, and mail carried by rail), or what it was like to have to ride trains instead of airplanes or autos, nor how railroads operated (signal systems, MofW, etc.). These will be eye-opening illustrations for an age that has almost completely forgotten the all-pervasive influence of railroads in the lives of ordinary people from the 1940s and earlier.

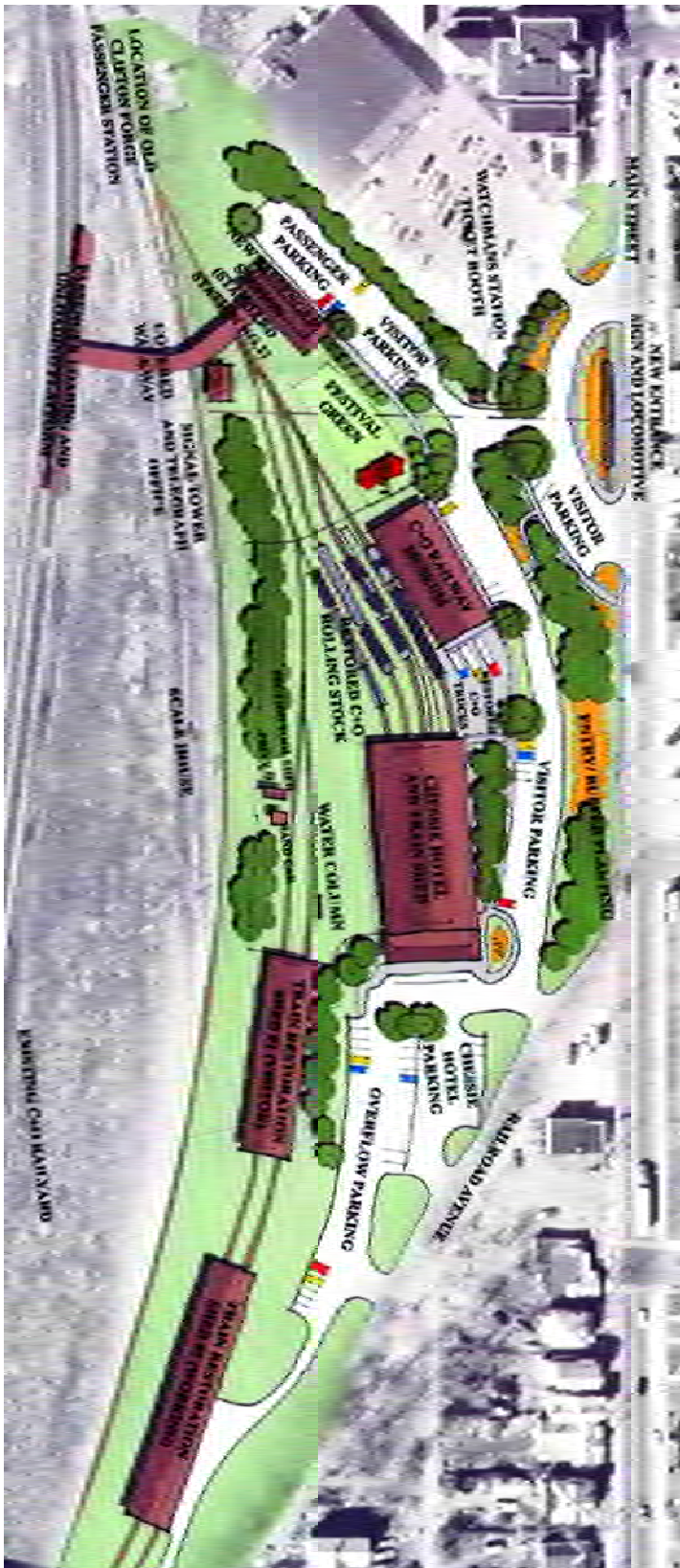
This plan also predicates use of one or more steam and diesel locomotives to interpret the motive power used to haul C&O's trains. Currently the ex-C&O 4-8-4 wheel arrangement "Greenbrier" type steam locomotive (on loan) provides this experience. Built in June, 1948, this huge locomotive gives visitors the feel of these engines which were, in fact, the "engines of change" that transformed the world in the period 1830-1940. The acquisition of at least one other C&O steam locomotive would help in this work. Our target is ex-C&O 4-6-0 "Ten-Wheeler" type No. 377 that was used for 20 years out of the Clifton Forge terminal for branch line operations east on the James River Subdivision.

Currently an ex-C&O GP9 model 1,500-horsepower diesel locomotive unit (built by General Motors' Electro-Motive Division in 1952) is on loan from the Virginia Museum of Transportation (Roanoke, Va.) and serves as our interpretative display for diesels that replaced steam in the 1949-1956 era. We also own an EMD Model SD40 diesel (built 1970) that will be used to illustrate the more modern diesel type (commonly called "second generation diesels") that replaced the earlier units. A third unit will illustrate passenger diesels. We own an ex-Union Pacific EMD E9 model unit. The plan calls for its cosmetic restoration. It will be painted the same as C&O E8 model units to show the type of streamlined motive power that replaced

steam. The E9 and E8 bodies are alike and though signage will tell the whole story of the engine, it will look the same as a C&O unit.

C&O's maintenance-of-way (MofW) operations are interpreted through use of our exact replica "Section Tool House" building equipped with track crew tools and housing a velocipede (peddle vehicle for one person), a hand car (often called a lever car or pump car), and a quadracycle (4-wheeled peddle vehicle). An ex-C&O motor car that was used by maintenance forces in the 1930s-1970s era will also be available.

Appendix C: Heritage Center Master Facility Concepts



PLAN OVERVIEW

