

## **KEY NOTE ADDRESS**

### **PHIL A'VARD - PUFFING BILLY RAILWAY SOCIETY**

In 1953 Tom Rolt, a race car enthusiast and author of books on British Industrial Archeology, made history. By forming the Talylyn Railway Preservation Society he opened the world of railways (and subsequently tramways) to amateur players. Thus began the era of rail preservation which spread throughout the western world.

Almost overnight, the rail laity found itself fulfilling its lifetime fantasies, as school teachers became locomotive drivers, doctors became guards and lawyers became signalmen. Almost overnight too, rail enterprises became managed by elected committees with individual members often appointed for their popularity with the members, rather than for their management expertise or experience.

Over the next ten years these organisations matured as they became aware of the hard facts of rail operation and discovered the need for sound financial management. In fact, their amateur boards and committees suddenly found that the railways they had preserved had become small businesses with budgets, balance sheets, and profit and loss statements. They only thing they did not have was a burgeoning salary bill as enthusiastic volunteers provided all the labour.

With the underpinning of this enthusiastic free labour, these small businesses grew through the seventies and achieved a high degree of success as part of the tourist industry. Increasing numbers of tourists increased the number of trains to be driven which in turn increased the infrastructure necessary to support the operation which increased the amount of money needed by the organisation so they needed to run more trains. Soon it became apparent that there was a mathematical relationship between "enthusiasm" and "success", namely that "enthusiasm" is inversely proportional to "success". As the "success" of the business increased, the enthusiasm of its volunteers began to decrease. So too did the number of volunteers as founding fathers grew old or found other interests.

Thus began the dilemma of the preservation movement in the last part of the century - as the number of volunteers falls, or if the success of the operation outstrips its voluntary resource, the spectre of paid labour arises, and I dare say this is now or has been on the minds of most people in the room today.

At this stage it is appropriate for a case study.

Puffing Billy is probably the best known and the most successful venture in Australian railway preservation. The enterprise is built around a former Victorian Railways narrow gauge branchline which linked Upper Ferntree Gully to Gembrook in the Dandenong Ranges near Melbourne.



The railway closed as a common carrier in 1953 as a result of a landslide which covered the track at its mid-point.

In 1955, after a series of "farewell" special trains sponsored by a Melbourne newspaper, a preservation group was formed. This group underwrote the Victorian Railway's costs of weekend services on the Upper Ferntree Gully to Belgrave section (which was on the Melbourne side of the landslide) until the Melbourne suburban electric train service was extended over the narrow gauge right of way to Belgrave in 1958.

Between 1958 and 1962, the Society provided volunteer labour and finances to reopen the line beyond Belgrave. This was a unique situation as volunteers from the Society were working under the direct supervision of the State Railways Department to repair a government owned railway.

Under these conditions and with the assistance of the Australian Army (which by-passed the landslide) the railway re-opened between Belgrave and Menzies Creek (6.3km) in 1962 and Menzies Creek to Emerald (3.71km) in 1965.

After a period of consolidation in which additional locomotives were obtained and reconditioned, rolling stock repair facilities were established and the track structure further strengthened, the line was reconditioned between Emerald and the Emerald Lake Park with trains reaching Lakeside station in 1975. The total length of the railway was then 13.9km and the annual patronage in the order of 150,000.

By 1977, the voluntary Preservation Society had gained twenty-two years' experience in railway management and in recognition of this, the Government of the day proclaimed The Emerald Tourist Railway Act 1997 which transferred ownership and responsibility for operating the railway to The Emerald Tourist Railway Board, a quasi autonomous government organisation which is largely made up of Society nominees.

After twenty-two years the voluntary management suffered no delusions that the enterprise could operate on a 100% voluntary basis and set up a human resource structure utilising both paid and voluntary staff.

The Board, supported by the Society, now employs a permanent staff of 30 persons and approximately 500 volunteers to operate well over a thousand trains which carry approximately 240,000 passengers annually for a total revenue of some \$2.3m.

The staff of 30 is engaged in work which volunteers cannot do because of continuity, the need for specialised expertise and weekday availability. However, their numbers are not sufficient to operate the railway at the level required by the tourist industry. The bulk of the labour required to operate (as apart from maintaining) the railway is still provided by society volunteers. It is calculated that to provide the existing level of service on Puffing Billy without volunteers would require twice the present staff level. As the existing salary bill is in excess of \$1m, it is not difficult to see that Puffing Billy without volunteers would be a losing proposition.

Against the revenue figure must be posted the actual cost of running. This is in the order of \$2m leaving a small surplus of about \$300,000.

Any accountant/businessman would close the enterprise down if they considered the level of surplus in relation to the capital invested - even in relation to the revenue.

The Puffing Billy story is a good example of what can be achieved and maintained by volunteers. However, I hesitate to prescribe its success as a recipe to others as there are elements in its evolution which have strongly influenced its success with volunteers and I



suspect that these elements may not exist in other enterprises which rely in voluntary support.

From the brief history I have given it can be seen that:

- \* Volunteers have been involved from the very beginning,
- \* Volunteers are involved in the overall management - and, indeed, dominate the representation,
- \* Volunteers have worked beside permanent (paid) staff from the beginning.

These points provide a strong base upon which to build an organisation that is largely managed and operated by volunteers. There are more strong points however. Working from this base, the Emerald Tourist Railway Board (remember, the society dominated government body which now operates the railway) determined from its inception that it would encourage volunteer participation in all aspects of its operation provided the volunteers would meet the same training and qualifications required by paid staff.

Hence, interested volunteers are able to study and qualify to act in positions such as train guard, signalman, station master, fireman or driver. This early decision by the Board adds two more strong points to the base referred to earlier.

- \* Volunteers have an opportunity to participate at any level in the enterprise subject to the same criteria as paid staff.
- \* Volunteers have a career path within the organisation.

It follows from this that trained and qualified volunteers are eligible for permanent staff positions when they arise and the Board's policy is to advertise any vacancies to the Society and volunteer body before advertising to the public.

Probably the best way to summarise the above is to say that Puffing Billy started as a volunteer organisation which supported professionals and has evolved into a voluntary organisation supported by professionals. As such it was in a favoured position and quite different to most of the preservation organisations which followed. They started as totally voluntary, and now, pressure of business or legal requirements is forcing the need for paid personnel.

There is much to be learned from the Puffing Billy experience however, some of which I offer as comment:

# **1. The consequences of introducing paid staff** (We've experienced all of these)

Jealousy - (from volunteers) He is being paid to do what I do for nothing

Contempt - (from paid staff) They're only volunteers, their work is inferior, they're never around when they're needed.

The "They get the money, let them to the job" syndrome, where volunteers stand back to let the paid staff do the dirty work.

Withdrawal when volunteers take the "they don't want me any longer" syndrome and leave the organisation.

Volunteers Possession - when volunteers hold on to a particular activity as their own, irrespective of the fact they cannot keep up with it's pace.



## **2. The Need for Maturation of The Organisation**

As indicated earlier preservation efforts become small businesses and in a capitalist society such businesses must grow to succeed. Hence there arises a constant environment of "change" which some volunteers see as a threat.

Puffing Billy has managed this reasonably well, mainly by appealing to the "thinking majority" of its membership through magazines and meetings. However voluntary organisations working towards a professional component should handle these "education" issues carefully.

## **3. The Need for Constant Motivation for Volunteers**

Whereas paid staff have motivation in their pay packet, a volunteer does not. To maintain their interest the railway must have a constant set of challenges or goals before them.

## **4. The Need for Equality of Involvement**

Volunteers must see themselves as being on an equal level to paid staff in the eyes of management. If this is achieved they normally defer to paid managers in a friendly master/servant relationship.

## **5. Devolution of Responsibility to Volunteers**

If they can do the job, let them do it.

The Board and the Staff have deliberately set out to avoid demarcation between volunteers and permanent staff. Any task on the railway is first tested as a possible voluntary role. If suitable volunteers cannot be found and if the need is proven, then a staff person is appointed. We work on the premise that if a volunteer can do it, he or she should be given the task - no matter what it is.

This can be seen by an examination of the management structure of the railway, in which the overall management is seen to lie in the hands of a committee consisting of voluntary and paid heads of departments.

Having set out the background and structure of the railway I'll try to address some of the points nominated. I would hope that these may lead to some discussion later in the day.

## **BOUNDARIES BETWEEN VOLUNTEERS AND PAID STAFF**

We are in the fortunate position that our paid staff has not sought to organise. This has enabled us to develop in them an awareness of the fact that volunteers are not a threat to their jobs. In fact, this awareness has developed into a belief that volunteers are their security. They realise that without the enormous voluntary input the railway, their jobs would not exist. This realisation extends to an understanding that part of their duty is to encourage and maximise voluntary input and in some areas of our activity a high degree of staff time is put into preparatory work for volunteer teams. Such preparation enables the volunteers to achieve more in their donated time and thus obtain greater satisfaction.

Ironically, we don't have problems with staff seeing volunteers as a threat. Rather the reverse ! We occasionally have volunteers seeing staff as threatening their jobs as volunteers.

Things to avoid are:



- \* **Boundaries:** Avoid them like the plague ! Set up a structure where there are none. Make each group aware of the importance of the other and that they are interdependent. Make them all part of the grand team.
- \* **Favouritism:** Be sure to treat the volunteer and staff member as equals.
- \* **Elitism:** If volunteers are interested, encourage them to undertake the same training as staff members - particularly if these are in-house.

### Digression and Example

On the Puffing Billy Railway, any person involved with operating a train or trolley must undertake a special training course in Railway Safeworking. This is an in-house training programme of approximately ten weeks with written, oral and practical assessment.

Both volunteers and staff members must pass this course; thus we have, every year, a situation where paid staff and volunteers sit through the same course (side by side) and undertake the same assessments. This is a great exercise in moulding them together as a team.

The course is conducted and assessments made by appropriately qualified volunteers. This helps put the worth of the volunteers in perspective for the staff.

### RESPONSIBILITY, ACHIEVEMENT AND MOTIVATION OF VOLUNTEERS

The management structure of the Emerald Tourist Railway Board illustrates that volunteers can and will accept responsibilities in management and it should be noted that a volunteer executive faces the same responsibilities under the law as does the professional. It is a responsibility of the organisation to ensure that appropriate professional indemnity insurance is taken out to cover both paid and unpaid executives.

In Puffing Billy's case responsibility is delegated well down into the volunteer ranks. Every day the train is operated with a high number of volunteer staff. These include:

- \* **Station Master (Officer-in-Charge)**  
Responsible for: Cash, ticket sales, train makeup, welfare of passengers, instigation of Emergency procedures, supervision of ancillary staff.
- \* **Guard**  
Responsible for: Safe operation of the Train.
- \* **Fireman**  
Responsible for: Operation of the boiler and safeworking duties.
- \* **Driver**  
Responsible for: Safe operation of the locomotive. (This latter position is usually paid, but we have 8 volunteer drivers.)

Each of these roles has been closely defined and requires considerable training and re-examination. They also have certain standards of performance required of them. For Example, the Station Master and Guard must ensure punctuality. The Fireman must keep up steam to the driver, the driver must drive the train safely and keep to the timetable.



Executing these duties and coping with the daily problems caused by late passengers, poor steaming coal, wet rails and the hundred other different things that can happen, provide these volunteers with challenge.

It is in overcoming this challenge - even on a daily basis - which leads to their satisfaction.

From our example we can perhaps suggest several things.

- \* Don't be afraid to give a volunteer responsibility if he/she is appropriately qualified. Provide them with the means to qualify.
- \* Always keep a challenge before them.
- \* Make them an integral part of the team and let them share in its achievements.
- \* Invest in them as you would your own staff.
- \* Challenge your staff to help volunteers achieve.

### **SUPERVISION OF VOLUNTEERS**

Supervision of volunteers on the Puffing Billy Railway is obviously done by appropriately qualified personnel whether volunteer or staff. Over the years the railway has trained volunteers to act as "works supervisors" who lead teams of volunteers to undertake track repairs and similar engineering tasks, carriage painting and restoration, signal and telegraph works and clerical jobs.

However, supervision of volunteers in the mechanical engineering workshops is generally done by staff members. Although we have a number of volunteers with appropriate skills the Board prefers to use staff in these positions to train volunteers appropriately ensuring continuity of the task and safety of both personnel and machinery.

It also acts as a "protective mechanism". As mechanical engineering is the area where most staff are employed, problems caused by weekend volunteer work are the responsibility of the staff person rostered as the supervisor and his workmates tend to vent their spleens on him rather than volunteers.

It is interesting to note that on many occasions staff tend to "volunteer" to supervise weekend workshop work parties without pay if the task to be undertaken is of particular interest to them.

### **MOTIVATION**

By definition, volunteers or amateurs are motivated people. They give their time to assist a project in which they are interested. The project's management, however, must recognise the need to keep them wanting to participate.

Fortunately for Puffing Billy, railways have a universal fascination and the enterprise can offer enthusiasts an opportunity to indulge in their interests. To this extent, it enables them to indulge in a big hobby; Steam enthusiasts have an opportunity to work on a real working locomotive, telephone enthusiasts on a real full scale communications system, signal and safeworking buffs can pull levers, wave flags at the back of trains in a real situation and be respected for it.

However, despite this, volunteers can become bored. One can have too much.



We try to discourage the volunteers who turn up every weekend and steer them into a rostered situation where they appear at three to four week intervals. This prevents over-familiarity and maintains interest.

Communications is another important factor in keeping volunteers motivated. We find that all workers, whether voluntary or staff need to know what is happening on "their" railway. With this in mind management introduced a monthly news sheet which is distributed with rosters to all those who work on the line. This includes reports from management meetings, progress on various projects, items of gossip and publicity of coming events.

In addition to this management conducts two open style forum meetings throughout the year. At these, the whole management team faces the volunteer workforce to answer questions and explain policy developments. These have proved to be excellent "safety valves" and provide a useful place for the exchange of ideas.

Probably the best motivation for volunteers is for them to be involved with an organisation which has a long term set of goals and is working towards them. A study of the Puffing Billy Railway will indicate that it has grown over three main stages: Belgrave to Menzies Creek; Menzies Creek to Emerald; and Emerald Creek to Lakeside. The fourth and final stage comes in October of this year when we open to Gembrook.

Each of these have taken years to achieve and each has been spaced some years apart. These goals have been like the proverbial "carrot on a stick" for volunteers who keep looking forward to the day when the current dream can be achieved.

I venture to say that Puffing Billy may have some problems in maintaining that carrot in the early 2000s as by that time it will have achieved its ultimate goal of returning the railway to Gembrook.

What can we learn from this? Let your volunteers take part in your dreams, share your goals and bask in your achievements.

## **FINALLY - RECOGNITION AND REWARD**

Beware of reward - be heavy but even with recognition.

The best form of recognition is a sincere "Thank You" at the end of the day from a person who matters. It is important that every person be thanked, preferably personally.

Puffing Billy supervisory staff, both voluntary and paid, are instructed never to let a volunteer leave without a "pat on the back" for his services.

Be even handed in distributing praise and messages of thanks and make sure that even the "lowest" volunteer (hate that word) receives equal billing to the high fliers - in the long run it is the great number of "also rans" who will help you reach goals.

Rewards are intrinsic and are best left in that category. Probably the best reward is to allow the volunteer to participate in his own achievement. For example - when a locomotive or carriage has been built or substantially repaired by volunteers the test run is always the exclusive property of the volunteer staff and those paid staff involved. The next run is given to them and their families to have a special social event. After that, the loco or carriage is turned out for general use.

The joy of riding behind the machine they helped restore outweighs any form of physical reward.



You could be forgiven for thinking that I have digressed from the theme of this paper. In the last few minutes I seem to have discoursed on the needs of volunteers rather than discussed volunteer/paid staff matters. I have done this unashamedly as no matter how many paid staff a rail preservation body may employ, volunteers will always be necessary. It is the free labour given by these dedicated people which picks up the shortfall between the real costs of operation and revenue. The amateur railway person will always be the lifeblood of your organisation.

I suggest that it is possible to combine a paid workforce with a voluntary one. It requires careful management and both paid and unpaid personnel must be led gently through the process and persuaded that paid personnel are not there because of volunteer inadequacy, but to make it easier for the volunteers to participate. Similarly, paid staff should be persuaded that their job security depends upon them motivating the volunteer workforce and maximising its effort.

The problem areas will always be from the "old guard", some of whom will see their personal hobby (dare I say, territory) being taken from them and uninformed newcomers will see their efforts as subsidising the salary of others. An education process will keep these areas under control. However, the issue must be monitored carefully and the message repeated constantly. There can be a lot of damage caused by an ill-informed person and the inevitable rumour mill!

Experience around the world proves that there will come a time when your railway or tramway will have to face up to employing people. Do not be afraid of it. If handled carefully it will benefit everybody.

The golden rules are:

- \* remember - both workforces are interdependent.
- \* use paid staff only when no volunteer can do the job.
- \* be even-handed in the treatment of workers, whether voluntary or paid.
- \* allow volunteers the same opportunities (i.e. training) to participate as paid staff.
- \* allow volunteers to participate with paid staff in all activities.
- \* recognise the volunteers worth to the organisation.
- \* never take your volunteers for granted.
- \* when a job becomes available give your volunteers the opportunity to apply for it. You won't find a better employee.

Finally - a thought!

Earlier I referred to a phenomenon I called "volunteer possession". When volunteers start an activity they want to hold on to it as being their own. We have a situation at Puffing Billy where our Night Train product was started by volunteers who believe they must continue it as a voluntary activity in spite of the fact that it has grown beyond their capacity.

Effectively this "voluntary possession" is inhibiting the growth of the particular enterprise and our management is grappling with the problem of developing the product further without alienating the volunteers.



There is a lesson in this and we did not learn it !

In developing a product around your railway, by all means use the volunteers in its pioneering stages but set them the target used by Rotary.

Work hard to achieve the end. When the project is self supporting, let it go and take up another challenge.