



OREGON ELECTRIC RAILWAY HISTORICAL SOCIETY

2023 ANNUAL REPORT



MISSION STATEMENT

The mission of the Oregon Electric Railway Historical Society, Inc. is to preserve the regional heritage of electric railway transportation as a living resource for the benefit of present and future generations.

To fulfill this mission, the Society will promote:

- The study of electric railways, their physical equipment, properties, and operation, devoting special attention to the railways of western Oregon;
- The procurement and preservation of historic electric railway equipment, materials, and property, and
- The display, interpretation, and operation of surviving historic equipment, materials, and properties.

OFFICERS 2023

President: Gene Fabryka
Vice-Pres.: Richard Thompson
Treasurer: John Ballentine
Secretary: Mark Kavanagh

BOARD OF DIRECTORS 2023

John Nagy – Chairman
John Ballentine
Gene Fabryka
David Harold
Susan Jones
Mark Kavanagh
Richard Thompson
Joe Tracy
Jan Zweerts

DEPARTMENT MANAGERS 2023

Museum Director: Vacant
WST Manager: David Harold
Newsletter Editor: Richard Thompson
Gift Shop Manager: Susan Jones
Webmaster: Mark Kavanagh
OERM Ops Mgr.: Ken Peters
WST Ops Mgr.: Jan Zweerts
WST VT Maintenance: Dave Rowe

OERHS OPERATIONS:

- Oregon Electric Railway Museum – Phone 971-701-6327
3995 Brooklake Rd NE, Brooks, Oregon, 97303 Museum
- Willamette Shore Trolley – 503-697-7436
311 N. State St. Lake Oswego, Oregon

Email: museum@oerhs.org
Website: <http://oregonrolley.com>

Cover Photo: Top - New Storage Track at Museum, John Nagy photo

STATE OF THE SOCIETY

By Gene Fabryka, President & John Nagy, Chairman

This was a good year for Society, even though we were still facing many challenges. The COVID-19 pandemic continued to affect the turnout of the public to attractions and events, and the trestle shutdowns are still in effect on the WST. Regardless, volunteers persevered, and we had a good year. We also successfully implemented our third Annual Powerland Halloween event, which was a great success (more info below). Our thanks go out to each of the 2023 Board members, officers, and to volunteers for their dedication and willingness to take on almost any task. To keep the Society moving forward and represent the members' interests, we encourage all of you to continue to volunteer and consider running for the Board or one of the officer positions. If you are interested, come to the Board meetings, which are open to all members, and see how the Society's business is conducted.

2023 Accomplishments:

OERHS Administration and Policy

The Board met regularly in person and by electronic meeting methods (such as Zoom) to conduct the business of the Society. This included reviewing and approving the monthly financials, setting priorities, budgeting, fundraising, interaction with APMA and partner museums, and planning for the future. The Board also oversaw the activities of the various subcommittees. We have continued negotiations with TriMet to receive a Type 1 MAX light rail vehicle when they are retired from service. Under the direction of Suzi Jones, a new logo (on the cover of this report) was designed to be used for the Society and the Museum. This will significantly improve the image/perception of the OERHS on our letterhead, electronic media offerings, and gift shop products. We hope to use it and the WST logo to offer name badges for both operations this year.

Travel Oregon has awarded a grant for \$69,840.00 to the Oregon Electric Railway Museum. Wheelchairs, seniors, and families with strollers often have trouble navigating through the gravel surrounding Hopmere Station at Powerland Heritage Park. The grant money will be used to construct a paver block path from the asphalt road to and around the station. This project helps to fulfill the grant's goal of making our operation more accessible and inclusive. Contractors will be hired to construct most of this over 4000 square foot, ADA-accessible pathway. We hope to complete the project by the beginning of next season. This grant was prepared and submitted by Gene Fabryka with help from John Nagy and Vicki Fabryka.

OERHS Operations

The Oregon Electric Railway Museum and the Willamette Shore Trolley went well this year despite the continued cutback of the WST line. The WST and Museum operating crews were a small but very dedicated group that ensured we were open for the public. Our third annual Powerland Halloween Adventure event was a success and helped bring new attendees to the museum and the WST. Operations at Steam Up topped previous records and remain the largest income event for the museum, but the Halloween event's growth is closing the gap. This year's interactive story event, "Journey to Atlantis," was designed for families with younger children, and they overwhelmingly gave positive and enthusiastic feedback. There were many returnees, and we even gained some new members. This year's event was

expanded to include partnerships with three other museums at Powerland. This enabled us to attract more attendees, offer a significantly enhanced experience, and help other partner museums generate income.

We look forward to growing the Powerland Halloween Adventure, and the Board continues to pursue additional events at the museum to make our operations self-sustaining and help the museum grow. This includes looking at opportunities to partner with other Powerland museums. A meeting is planned for the 1st quarter of 2024 to consider and plan additional events for the museum and the WST. If you have an idea for an event or would like to help plan or staff an event, contact the Board and let them know because, without volunteers like you, it cannot happen!

Board Goals for 2024

- Increase membership and member participation
- Advocate for the completion of the WST trestle work to reopen the full line
- Acquire a MAX Type I car for preservation and future operation
- Fundraise for OERM Car barn #2
- Complete our policies on Endowments, Member/individuals Use of Museum Facilities and Member Conduct
- Compile the information needed to allow us to finalize and adopt the Strategic and Project Prioritization Plan within the next two years.
- Install the lineman open freight shelter in the shop yard at Powerland

Department Managers

Our sincerest gratitude to:

- David Harold, WST Manager, and his management team of Dave Rowe, Rod Cox, and Jan Zweerts for their efforts to make the WST operation possible.
- Dave Rowe, Kevin Reilly & Rod Cox, the VT cars are beautiful and reliable, the R.O.W. continues to improve, and the battery project is making significant progress.
- Greg Bonn for his expertise that kept the museum running and growing.
- Mark Kavanagh, Webmaster for administering the website and the Monthly Pass, also social media coordinator (Facebook).
- Ken Peters & Jan Zweerts, for crew scheduling, training, and many hours of operation – without you, we could not offer such great rides!
- Halloween Event Coordinator Joe Tracy for his supreme efforts in managing the event.
- Suzi Jones and her gift shop team for a great year and quality facilities
- Newsletter editor Dick Thompson and publisher Wayne Jones.

Volunteers

In addition to those members who volunteer their time for the Board or as managers, we want to thank all the volunteers who donate and staff the OERM and the WST – together, we make it happen!

OREGON ELECTRIC RAILWAY HISTORICAL SOCIETY, INC.

John Ballentine, Treasurer

Preliminary Financial Statement for 2023

Cash balance as of November 9, 2023

Checking account \$141,872.17

Revenue

General Operating Contribution \$5,420.27

Museum Trolley Operations \$39,458.12

Willamette Shore Trolley Operations \$63,637.57

Capital Contributions \$0

Refunds \$500

Total Revenue \$109,015.96

Expenses

Museum Operating Expenses \$18,583.77

Museum Administrative Expenses \$11,269.87

Museum Capital Expenses \$11,265.10

Willamette Shore Expenses \$60,062.05

Total Expenses \$101,180.79

Net Income \$7,835.17

Note: All balances were determined from balances recorded on November 9, 2023 and do not reflect revenue and expenses occurring in the remainder of 2023.

MUSEUM REPORT

The OERHS has not yet appointed a new Museum Director (Greg's shoes are hard to fill) so Board members, museum volunteers, and donors stepped up this year to keep things moving.

Overhead Improvements

Work continued this summer to transfer the overhead to the new poles that were installed by volunteers a few years ago. Just days before Steam Up, a rotten pole that had not been transferred was snagged by a tractor, which broke the pole and incapacitated the mainline overhead. Luckily, though only a few weeks out of the hospital, Greg Bonn could lead a crew to transfer the overhead to the new pole and make some adjustments. This paid off instantly, as the first weekend of Steam Up was a record for us in terms of the number of riders and income. Greg has been training with Mark Terkelsen and Rick Lucia to continue making the transfer. This will enable us to get the wire back in position and at the proper height to facilitate smooth operation.

Mainline and Yard Track Improvements

Last year, Rick Franklin of Rick Franklin Corporation donated his crew and equipment to bring the mainline up to Class 1 specifications and install a new switch on the yard lead to be used as a locomotive storage track (and a lead to the future restoration shop). His bid was that we pay for the materials, and he would supply all the equipment and labor. However, upon completion, he decided to donate the entire cost! This year, his crew returned to do some final work on the switch, and we asked if they could rebuild/realign the yard curve. We offered to pay, but he requested that we donate the former Samtrak car we owned to the Oregon Rail Heritage Foundation. For many years, we had been leasing the car to the group doing operations there in exchange for a minimal annual fee and their storage & maintenance of the car. This donation would help us obtain some needed trackwork and support a fellow rail museum. The Board agreed and made the donation.

While the crew was onsite, he directed them to complete the locomotive storage track. Their final action before packing up was to move all locomotives onto the new track the evening before the start of the Halloween event so that our mainline would be completely clear for operations. The work is great, the volunteers love the improvements, and we are immensely grateful for his generous donation.

Car 48 & Car 1187 Restoration and Maintenance

Car 48 has been the museum workhorse for the last 5 years and is showing some wear & tear. Volunteers began working on it and readying car 1187 for operations. Fixing loose and stripped screws, damaged moldings, and peeling paint is just a tiny part of the work. Car 48's platform steps were in bad shape and have been replaced with new ones that should last us many years. Our thanks to: Mark Terkelsen, Rick Lucia Pete Manuele and Gene Fabryka.

Clean up & Organization

When we moved from the old museum, we had to do so quickly and thus had little time to sort or purge materials. We did not have time to work on that this year, but Greg Bonn found us a good deal on two 40' cargo containers, which arrived this summer. Thanks to board member Susan Jones and her daughter, Dennise Nixon, we acquired many high-quality storage shelving to install in these and our existing storage trailers. One container will be used to store the MAX Type 1 parts we will be getting as part of the light rail car donation, and the other will be used to store the materials for our Halloween and Holiday Sparkles events (which we have been stashing all over the place up until now.) Our goal over the

winter and into 2024 is to organize and eliminate unneeded materials to make what we keep more manageable and accessible for the future. Our thanks to Susan Jones, Dennise Nixon, John & Joyce Nagy, Gene & Vicki Fabryka, Mark Terkelsen, and Rick Lucia.

Landscaping

The Western Railway Preservation Society (the 3' gauge rail group next to us at Powerland) had some challenges finalizing their future track alignment. Hearing of this, we stepped in to identify mutually beneficial solutions. We agreed to grant an easement or slightly change our museum lease area boundaries to allow them to install their track north of (but adjacent to) the road to the carbarn. They and the Logging Museum will take over maintenance of that area and replace any lost trees. This will simplify their track construction, reduce our maintenance load, replace some problem trees with healthy ones, and hopefully entice more Powerland event attendees towards the carbarn.

On the museum grounds:

- Mark Terkelsen led efforts to get our waiting benches refurbished and reinstalled. This was a nice improvement for our guests and the museum's look.
- Karen Bonn tackled the landscape around the powerhouse and got it back in shape
- Gene & Vicki Fabryka mowed, trimmed, brushed, and sprayed throughout the spring, summer, and fall. We are still working to address the tree damage from the 2021 ice storm but are making progress
- Powerland Caretaker Tom Brock, on his own time, also helped with some mowing to help keep some of our "show" grass areas tidy.

Maintenance Help Needed!

Maintenance is continual at the museum, whether it is keeping the cars running, mowing the grass, spraying the weeds, or, very easily, dozens of other necessary tasks to keep the museum in shape and operating. First impressions by the public are very important to our continued success. This is not only limited to the streetcars but includes everything they see while visiting our museum. Every effort brings almost immediate improvement, but we are running out of time. Current volunteers at the museum have been stretched to their maximum, and we need more to keep it going. Many tasks require neither a lot of time nor professional skills but are greatly appreciated when completed. ***Consider spending a day or two each month at the museum to help accomplish our goals.***

Museum Operations

Museum operations went well in 2023, and the cars and infrastructure performed well. A core group of volunteers kept the museum operations going. Mark Kavanagh is now heading up the new training program (created by Greg Bonn in 2022) for motormen at the museum and will continue to build upon it for 2024. Board member Joe Tracy (who is also the Outreach Coordinator for Powerland) is working on outreach, ways to get more visitors to the museum & the WST, and to attract more volunteers. If successful, we can be open more days and not wear out the small core of die-hard volunteers who are there almost every Saturday to do operations.

Willamette Shore Trolley
David Harold, WST Manager

We had a pretty good year. 13 charters so far, 8 more to go. Online sales worked well, with room for walkups. Christmas is going to be busy. Looking forward to a busy season in 2024. Our biggest problem is personnel. Before Covid, we had 32 motormen; after (at the start of last season), we had 9. Luckily, we have picked up a few new ones and some maintenance people. More are needed. For the Halloween event, the Squareup terminal from WST was moved to Hopmere to pair with the existing one – with only one terminal at Steam Up, it looked like an Octopus was running the counter with all the arms flying! A newer one was installed at the WST Depot. It operates a little differently, but we will be conducting training in the Spring. All in all, a good year. Many thanks to all who helped.

WST Operations - Jan Zweerts, Supt.

This summer, we ran Public Runs @ Noon, 1 PM, 2 PM, 3 PM, covered by two shifts of volunteers. Ticket Spice sold 70% of the seating capacity online, and 30% was held for walk-up patrons.

A total of 29 days this season for 116 public runs on the weekends plus charters. 58 shifts by only 16 volunteers, who averaged 3.6 shifts each. 8 volunteers did 10 or more shifts each during the summer season. 116 runs times 24 online tickets, which on average is 2784 passengers @ \$8 each, bringing in about \$22K in revenue. We did not have enough bodies to do Steam Up and runs, so runs for August 5 – 6 were canceled. Myself, “Trolley” Dave Rowe, and David Harold were on hand at least one day every weekend.

Notable volunteers Craig Arrowsmith organized Elk Rock Tunnel clean up, Larry Bruss took notes of each Motormen’s Meetings where Nuts and Bolts of trolley operations were discussed and where we also did much of the trolley training. I want to thank Stephen Dudley, Tom Gaps, Gwen Bruss, and Ken Peters who just kept showing up weekly. 6 other volunteers filled in with slightly fewer hours.

Fun stuff for volunteers: New Year's Rail Ride, 4th of July Fireworks Ride, Christmas Ships party at Jan & Rae’s float home. Last Trip: Two WST Motormen in uniform attended Janice Reddaway’s Memorial service at Champoeg Park.

Gift Shop (Museum and WST) – Susan Jones, Mgr.

With the great assistance from our gift shop team: Joyce Nagy, Betty Ballentine, Greg & Karen Bonn, the gift shop at both the museum and the WST has grown. Both have an expanded inventory and updated display area. At the museum, there are New and Used Books and Collectibles sections. Lettered signs hang above the Ticket and Merchandise counters, New and Used Books, and Trolley Platform. David Harold and Mark Kavanagh are completing the addition of a second pay station for us to handle large crowds better.

Also, our Museum Volunteer plaque, Mission Statement, New Volunteer Recruitment poster and Membership forms are now located at the Museum Gift Shop entrance, along with a Guest Sign In Book. These focus our guests on what we are and what we do. Plans for a similar display at WST are underway.

Public Communication

Mark Kavanagh

The OERHS has maintained a web presence for many years. If you type *Oregon Trolley Museum* in Google, our museum's website remains in the # 1 position. Our website is a good front entrance to the rest of the world, but what drives more interest today is social media. The website and our Facebook pages work hand in hand. Due to social media, we were able to sell out many of our Willamette Shore trolley re-start runs. Facebook also clearly led to a successful first year of the Powerland Halloween event.

# of FB Followers	2017	2018	2019	2021	2023	% increase since 2017	% increase since 2021
Museum	522	1,186	1,449	1,666	1,750	235%	5%
WST	937	1,429	1,710	2,000	2,187	133%	9%

Here are some interesting, updated demographics:

- The Museum's predominant followers (73%) are Male, with an even distribution of about 13% each between age groups of 25-34, 35-44, and 45-65, but 65+ is the largest group.
- WST's predominant followers (60.3%) are female, with the largest distribution being between the ages of 35-44 and 45-54.
- Based on the above, young families enjoy the Willamette Shore Trolley; the Museum's followers seem more rail fan-based and are at or nearing retirement
- Geography is also interesting; for both the WST and the Museum, Portland is the most dominant of our FB visitor locations. Then it diverges.
 - For the Museum #2 is Salem, which makes sense, then #3 is Hong Kong (due to our HK Tram #12, #4 is Sydney, Australia, due to car 1187. Then comes other local Oregon cities like Beaverton, Eugene, Hillsboro, and Keizer
 - The WST#2 is Lake Oswego, which is expected, then Beaverton, Salem, Vancouver, West Line, and Hillsboro.

We need to work to encourage young families to visit the museum. The Powerland Halloween event is a perfect step in the right direction!

As a member, you can help build our Facebook presence by following the museum and the WST on Facebook. Please like and share our posts as appropriate. This helps to increase the visibility of our operations to more people.

Museum Facebook Page: <https://www.facebook.com/OregonElectricRailwayMuseum/>

WST Facebook Page: <https://www.facebook.com/WillametteShoreTrolley/>

The website could use a refresh, but a recent update in WordPress baffled the Secretary, affecting the WST. If there is anyone willing to take on the WST portion of our website, please contact the Secretary.

Ticketspice is still our provider for online ticket sales for the WST and Powerland Halloween. It is sometimes quirky but drives more people to ride the trolley. The WST often sells out trips in the summer, and Christmas Runs sell out in minutes. A better ticketing platform might exist, and the Secretary will work on other options.

Membership Database still needs to be better managed. Currently, we are using an Excel Spreadsheet. Ticketspice showed some promise as it has a membership option that allows us to give members discounts on trolley tickets. But it is not ideal with true CRM capabilities. We have a small membership base, so it is hard to justify the cost of an online platform to manage memberships, but we should consider it in the budget sometime in the future.

VOLUNTEERS
Mark Kavanagh

In 2023, many individuals graciously donated their time to the OERHS at the museum and the WST. However, the number of volunteers is still down. That can be attributed to the COVID-19 pandemic and, more sadly, to an aging volunteer base. However, we still had a lot of volunteer hours recorded. The total hours provided to the secretary equals nearly 8,000. It is clear not all hours are benign recorded, including travel time. The total is closer to 10,000 volunteer hours. In 2019, a federal program for seniors estimated that each volunteer hour is worth \$22.00; it is probably worth more now. So your time is valuable. *Please remember that by reporting your volunteer hours, you help us use that as part of a match for many of the grants we apply for.* We know that many individuals volunteered but didn't provide their record of time so that we may have missed a few of you; please send them to the secretary at mark@oerhs.org

Looking at who volunteered for Powerland Halloween, Steam-Up, WST operations, and back-office operations, I thank the following members for supporting the Society in 2023. I apologize in advance if I missed anyone.

First	Last		First	Last		First	Last
John	Andoh		Tom	Gaps		Dave	Rowe
Craig	Arrowsmith		Michael	Hafner		Adam	Samish
Doug	Artz		David	Harold		Debbie	Samish
John	Ballentine		Paul	Johnson		Jan	Sandlin
Betty	Ballentine		Suzi	Jones		Reilly	Smith

Roy	Bonn		Mark	Kavanagh		John	Stephenson
Greg	Bonn		Rick	Lucia		Mark	Terkelsen
Larry	Bruss		Don	M		Richard	Thompson
Gwenn	Bruss		Tracy	M		Joe	Tracy
Nick	Christensen		Pete	Manuale		Mesheal	Tracy
Chris	Cox		John	Nagy		Michelle	Veri
Travis	Dryden		Joyce	Nagy		Jay	Weitmen
Micky	Dryden		Chance	Nicely		Jan	Zweerts
Jake	Dutt		Ken	Nicely			
Vicki	Fabryka		Ken	Peters			
Gene	Fabryka		Kevin	Reilly			

2023 Membership
Mark Kavanagh

We are seeing a slow membership recovery in 2023 from the COVID-related decline. In 2021, we dropped to 120 memberships. In 2022, we had a net add of 10 more. In 2023, our net gain was another 8 members. We have lost several members in the past few years, a sign of our aging membership. Our most significant gain in new members happened with Powerland Halloween. We thank Micky Dryden for recruiting members to help with the Halloween event. It shows we can recruit members when there are specific activities that they might be interested in doing. The best recruiters are our existing members. Please talk to friends and family about all the WST and Museum volunteer opportunities. It is not all about operating streetcars. There are plenty of things to do.

This is a reminder that memberships are based on a calendar year. Except for Life Members and new members who joined in September, all memberships expire on 12/31/2023. Please renew early to save postage on sending reminders.