

OREGON ELECTRIC RAILWAY HISTORICAL SOCIETY



ANNUAL REPORT

2019

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 2019

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

BOARD OF DIRECTORS 2019

John Nagy – Chairman
Gage Geist
Gene Fabryka
David Harold
Mark Kavanagh
Mark Moore
Bryan White
Richard Thompson
Carolyn Vernon

DEPARTMENT MANAGERS 2019

Museum Director: Greg Bonn
WST Manager: David Harold
Newsletter Editor: Wayne Jones
Gift Shop Manager: Carolyn Vernon
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, Brooks, Oregon, 97303 Museum
- Willamette Shore Trolley – 503-697-7436
311 N. State St. Lake Oswego, Oregon

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

Cover Photo: MAX Type I LRV during testing outside of Pueblo, Colorado – Hopefully it will join our collection 2 years from now. Photo courtesy of the TriMet Facebook Page.

STATE OF THE SOCIETY

By Gene Fabryka, President & John Nagy, Chairman

This was a very good year for the OERHS and brought us to a new level of organization and operation. Our thanks go out to each of the 2019 Board members, officers and to the volunteers for their dedication and willingness to take on almost any task. In order to keep the Society moving forward and represent the interests of the members, we encourage all of you to not only continue to volunteer but to also consider running for the Board or one of the officer positions. If you are interested, come to the Board meetings, they are open to all members, and see how the Society's business is conducted.

2019 Accomplishments:

OERHS Administration and Policy

The Board met regularly 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 oversees the activities of the various subcommittees and forms additional project specific ones as needed. Last year we were awarded four grants, bringing in \$48,500, and an additional \$8,000 grant this year. This past year has been spent fulfilling the requirements of the grants. In 2020, we plan to complete our grant projects, work on needed maintenance, start fund raising for a second car barn and start a new event at the Museum.

Willamette Shore Trolley

Under the leadership of David Harold, WST Manager, and his management team of Dave Rowe, Rod Cox and Jan Zweerts we had another great operating season on the WST. The major accomplishment this year was the growth of the operation and the work of Dave Rowe and his team on progress towards the conversion of one of the cars to battery operation.

The Claude Sabot Collection (Brussels Trams)

The multi-year Brussels Trams campaign was successfully completed through donations and a generous challenge grant of \$11,500 from the 20th Century Electric Foundation.

PRL&P #1067 Project

We successfully purchased the running gear of former PRL&P interurban #1058 (body not restorable) from the Northwest Rail Museum to use on our PRL&P interurban #1067. This was an important step in the progress towards having an operable interurban car. A \$20,000 grant from Travel Oregon was integral in kicking off this project. In addition, this acquisition was supported by an \$8,000 grant from the Oregon Heritage Commission and the Oregon Parks and Recreation Department.

Car barn # 1 Upgrade Project

President Gene Fabryka and Museum Director Greg Bonn are in the final steps of completing a project to upgrade car barn #1 from an "S1" (storage building) classification to an "A3" (public use). This will allow us to have large groups tour the barn at a time and also opens the way for its use for events such as the

Haunted Car barn Halloween Adventure. A \$7,000 grant from Travel Oregon and a \$2,000 grant from Marion Cultural Development Corporation is helping to fund this project.

Travelling Displays

Staffing shows and events to showcase the Museum and the WST are important. The Board recognized that we did not have a set of quality, transportable displays to use at these events. President Gene Fabryka designed and completed construction of a Children's Exhibit Trolley. He and Vicki Fabryka have displayed the trolley at AgFest at the State Fairgrounds, and at the Mini Maker Fair at OMSI. A \$1,000 grant from Lake Oswego Tourism helped to fund this project.

Interpretive Exhibits Design

Vice-President Dick Thompson kicked off efforts to finalize the designs for interpretive exhibits in Hopmere Station. A revised proposal is pending and funding efforts will begin soon after.

Treasurer

Member John Ballentine stepped in to serve as our new treasurer. Suzi Jones mentored him through the transition and he has been working hard to obtain a thorough understanding of our position and refine our use of QuickBooks and record keeping. John also continued to volunteer for museum operations throughout the summer.

Board Goals for 2020

- Increase membership and member participation
- Fundraise for Car barn #2
- Develop and host our first Annual Halloween Adventure event at the museum in October 2020
- Finalize and adopt the Strategic Plan and the Project Prioritization Plan

Department Managers

Our sincerest gratitude to:

- Greg Bonn, Museum Director for an extraordinary amount of time and expertise that keeps the museum running and growing.
- Mark Kavanagh, Webmaster for administering the website and the Monthly Pass.
- Ken Peters & Jan Zweerts for crew scheduling, training and many, many hours of operation – without you we wouldn't be able to offer such great rides!
- Dave Rowe & Rod Cox, (titles) the VT cars are beautiful, reliable and the R.O.W. continues to improve.
- Wayne Jones for newsletters that are the envy of many a museum.

Financial Report
John Ballentine, Treasurer

OREGON ELECTRIC RAILWAY HISTORICAL SOCIETY, INC.

FINANCIAL STATEMENT YEAR TO DATE

October 31, 2019

CASH BALANCE

Checking Account	\$88,335.19
------------------	--------------------

REVENUE

General Operating Contribution	\$47,819.14
--------------------------------	-------------

Capital Contributions	\$17,429.94
-----------------------	-------------

Museum Trolley Operations	\$15,236.30
---------------------------	-------------

Willamette Shore Trolley Operations	<u>\$109,783.02</u>
-------------------------------------	---------------------

TOTAL REVENUE	\$190,268.40
----------------------	---------------------

EXPENSES

Museum Operating Expenses	\$24,838.15
---------------------------	-------------

Museum Capital Expenses	\$54,991.97
-------------------------	-------------

Museum Administration	\$10,886.41
-----------------------	-------------

Willamette Shore Trolley Expenses	<u>\$105,198.30</u>
-----------------------------------	---------------------

TOTAL EXPENSES	195,914.83
-----------------------	-------------------

NOTE: This is a preliminary statement for 2019 year to date as of October 31st and does not include additional revenue, contributions, or expenses that will be recorded in the 4th quarter.

MUSEUM DIRECTOR'S REPORT

Greg Bonn, Museum Director

2019 was, and still is, a busy year at the museum. With funding from a couple of grants, upgrades are being made at the carbarn to increase the occupancy level to accommodate larger groups and possible future indoor events. All of the old, high wattage, metal halide fixtures were removed and replaced with eighteen, high efficiency LED fixtures. The outer aisle fluorescent fixtures were also replaced with LED lights that add additional lighting for tours. Emergency lighting and exit lights were also added. Three additional emergency doors were added with dusk to dawn exterior lighting installed over each. Concrete work included exit pads at the three new door locations and a three-space concrete parking lot on the west side. Two of the spaces are reserved handicap parking and the third space should be reserved for the museum director (but that is still under discussion). At the time of this report, we are still working on this project to finish all of the details to complete the grant requirements.

Replacing the lighting and adding the additional emergency circuits meant that there would be a lot of time spent working close to the ceiling of the building. While checking rental prices on a scissor lift, we were notified by state surplus that a trio of lifts had just been delivered to the yard. Upon inspection, we placed our name on the want list and a couple days later we were called and told we had been one of the chosen. Though the lift was a bit rough in appearance, it was great mechanical shape. Our \$2000.00 purchase was roughly the same as it was going to cost to rent one for a month or two but would mean we had a permanent piece of equipment to use for future projects. We replaced the batteries and did a little cleaning and paint touch up. The lift performed like a charm and made the project go smoothly. We have also been making the lift available for use by the fire museum for work on the interior of their new building.

Volunteers spent four days in Snoqualmie reducing the remains of Portland Traction Company Line Car 1058 to a blue tarp wrapped flat car with trucks and motors, compressor and tanks and a complete GE Sprague multiple unit control system with controllers. The rest of the body was, almost, carefully dismantled and just as carefully, heaped in a continuing growing pile next to the car. At the end of the four days, the smaller items, including the controllers and brake valves, were packed into cars and trucks and taken to our shop at the museum. The trucks, motors, controls and brake equipment salvaged from this car are identical to that originally used under 1067 and will be used to restore it to operating condition. At this time, the car is schedule to load and move to the museum on Friday, November 15th. where the crew will begin removing the control equipment and other under car equipment.

Twenty new thirty-five foot poles have been ordered for the overhead and should be delivered to the museum in the November. We hope to plant the poles this winter and spring as weather and equipment permit. We are working find someone to set the poles as a donation. Track work in 2019 was focused on the switchwork in the yards. A long-term plan is being considered to rebuild the switches on concrete to eliminate the rail movement and reduce maintenance.

Restoration work continues on the sweeper and 1067. Cars were shuffled in the barn which enabled us to place the sweeper in bay 4 where it is closer to power outlets, brighter lighting and a better working surface under the car. It also places the San Francisco PCC car in bay 2 making it easier for the public to access.

Four oak book cases, acquired from state surplus, have been installed in the library and almost immediately filled with boxed and labeled magazines. They date from the 1930's until present and include all of the major rail fan and modeler's magazines as well as many industry periodicals. Space is still available for four more bookcases as archive and collection sorting continues.

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

Gift Shop (Museum and WST)

A new t-shirt design (featuring double-decker #48) was produced just in time for Steam Up and Carolyn is already working on an additional design to be ready for the 2020 season. We hope to produce more custom designed apparel and gift items for 2020.

Willamette Shore Trolley
David Harold, WST Manager

2019 was an excellent season! We continue to have lots of charters, especially this time of year. Again, our Christmas Ship runs will cover 5 nights, with 2 runs a night. Tinseltown Trolley is growing again, with 16 runs during a long weekend. We are doing the Fa La La Trolley on 2 nights, with 2 charters. All this just in December! We will be very busy, and will need all the volunteers that we can get to staff the crews.

Our revenue was a bit off this year, due to 514 being unavailable. It is being upgraded to battery operation, and will likely be done in the Spring of 2020. After testing, it will go online and 514 will then undergo its own battery conversion - maybe in time for the 2020 Christmas runs - no promises! I want to extend great thanks to Dave Rowe and Kevin Reilly for all their hard work on the upgrade project.

We acquired the materials to make ¼ mile markers for the entire line. They will be used for location information when needed for breakdowns or emergencies. Lake Oswego will be MP 0 running upwards to MP 6 with markers every quarter mile. They are slowly being installed along the route.

Sometime in the near future, we are going to have a combined drill with Lake Oswego Fire, Medical & Police. It will be over a few days, and will cover different scenarios that might require their assistance along the line (the mile markers will be a big help). We will also be giving them a map with all the right-of-way access points marked.

The air conditioner that we purchased for the Depot, with the help of Lake Oswego, was a great help on hot days. We are very thankful for the City's support.

Thank you to all for helping us have another great year!

OERHS Operations
Jan Zweerts and Ken Peters

Willamette Shore Trolley

Gage Geist is working on the final stages of the revisions of Rules and Regulations and updating the VT 513 Manual. He has a more structured training plan which he will distribute that will make it easier for pilots to keep track of the trainees. Our insurance approved individuals of age 16 with driver's license as eligible to be a Class 2 and at 18 they are eligible to be a Class 1. This should allow us to bring in younger volunteers to mentor with Class 1 operators. Gage and Peter Kloosterman are both working on a Depot Agent syllabus.

New Operators: Rich Morgan, Steve Dudley, Larry Bruss, David Jorling, Tom Wirch, Gwen Bruss, Kabir Bhatia. Steve Dudley is returning to the WST after a long time away. He grew up in Long Beach, California riding interurbans and helped with the ROW back in 1987 when the WST was just getting started.

New Class 1 Motormen: Craig Arrowsmith, Larry Bruss, Stephen Dudley, Tom Wirch, Janice Reddaway and Steve Morrison.

44 motormen now on the crew board.

Oregon Electric Railway Museum

2019 operations at the museum began on May 18th using car 48. Motormen were recertified and the first revenue runs of the year were made. The regular season ended on September 1st. The final day of operations was September 21st with the Hops and Vines Event. All told there were 32 full days of revenue operation plus a partial day for a charter. We had 16 volunteers who put in 122 volunteer days of operation for the year. The big event of the season was Steam Up. For this we had 14 members who put in 280 hours.

Five members put in ten plus shifts for the season: John Ballentine, Nick Christiansen, Steve Mills, Richard Neva and Ken Peters. Many of those helping with operations also spent time helping with grounds work, equipment restoration at Powerland, being treasurer and volunteering on the Willamette Shore Trolley.

Part of our successful operations was the ability to handle adversity. This was demonstrated on the second Saturday of Steam Up when the insulator on car 48's pole broke. Car 1187 had been staged as our backup and it took little time for her to take on 48's duties. With her pole repaired, 48 was able to close out the season on September 21st. It had been one of my wishes last year to have a third car available for operation for the 2019 season and while never needed, it was nice to know that 201, the Oporto car was available.

As always additional volunteers would be welcomed as would more motormen putting in ten or more shifts for next season. For 2020 I am confident that we will once again be able to operate between Hopmere and the Dezotell end of the line. It is something to look forward to.

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 comes up as the top hit. If you type *Portland Oregon Trolley*, the WST comes up as # 3 behind Portland Streetcar in 1 and 2. It shows Google has indexed our website well. I hope to do a refresh of at least the WST website over the winter with a different look. Our website is a good front entrance, but what drives interest today is social media. The website and our Facebook pages work hand in hand. Due to social media, we have sold out our WST Christmas runs for two years in row well in advance of the trips. It also helps that we offer online ticketing. Below are some Facebook statistics.

# of FB Followers	Jan 1 2017	Jan 1 2018	Nov 7 2018	Oct. 30 2019	% increase since 1/1/17	% increase since Nov. 2018
Museum	522	942	1,186	1449	177%	22%
WST	937	1204	1,429	1710	82%	19%

The big jumps for the museum can be attributed to posting several videos of 48 in operation, and it nearly went viral.

Here are some interesting, updated demographics:

- The Museum's predominate followers (72%) are Male with an even distribution of 14% each between age groups of 25-34, 35-44, 45-65.
- WST's predominate followers (56%) are female, with the largest distribution being between the ages of 35-44 at 20%.
- Based on the above, young families do enjoy the Willamette Shore Trolley; the Museum's followers seem to be more rail fan-based.

My hope, as Secretary, is to continue to work with our social media team (Greg, Jan, Mark M) in 2020 to focus on getting families interested in the museum, as well as build the presence we already have for the WST. I want to add Instagram, but I'm more of a FB user. If there are members that are social media savvy, I'd love to talk to you on how to increase our presence.

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 get more visibility of our operations to more people.

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

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

2019 VOLUNTEERS

Mark Kavanagh

In 2019 many individuals graciously donated their time to the OERHS, both at the museum and at the WST. For those who have reported their time up until 10/30/18, has totaled up to over 9700 hours. Each volunteer hour, according to RSVP (Retired and Senior Volunteer Program), a federal program, rates each volunteer hour at \$22.00. So that equates to about \$213,400 in volunteer labor reported for 2019. *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 we may have missed a few of you, please send them to the secretary at mark@oerhs.org

Based on the members who reported their hours for 2019, we would especially like to recognize those listed below for donating over 50 hours. Thank you all for your efforts!

John	Ballentine
Bill	Binns
Greg	Bonn
Larry	Bruss
Nick	Christiansen
Rod	Cox
Stephen	Dudley
Gene	Fabryka
Vicki	Fabryka
Tom	Gaps

Gage	Geist
David	Harold
Wayne	Jones
Mark	Kavanagh
Peter	Kloosterman
Peter	Manuele
Mark	Moore
John	Nagy
Rich	Neva
Ken	Peters

Janice	Reddaway
Kevin	Reilly
David	Rowe
Bob	Terkelsen
Richard	Thompson
Carolyn	Vernon
Jay	Weitman
Tom	Wirch
Jan	Zweerts

2019 Membership

Mark Kavanagh

Our membership this year did a modest increase over last year, going to 158 memberships in good standing. Please note that all but Life memberships expire on Dec. 31, 2019, unless you joined or renewed your membership since mid-August. The Board voted to increase the membership rate starting Jan. 1st, 2020 for Family memberships from \$40/year to \$60/year. Contributing memberships are also increasing from \$50/year to \$75/year. All other membership levels remain the same. If you renew your family membership before Dec. 31, 2019, you may renew at the current \$40. I have already sent out renewal notices. Please renew soon to save the society time and money on sending our reminders. The 2020 membership cards will go out sometime in December. I am looking at a more automated way to do memberships, including having membership cards for your phone and automated renewal reminders. But it will take some time to find the right low-cost application.