



OFFICIAL PUBLICATION OF THE PACIFIC SOUTHWEST RAILWAY MUSEUM ASSOCIATION
—OPERATING THE SAN DIEGO RAILROAD MUSEUM AND THE SD&A RAILWAY—

Senior Citizens Transform RPO Car

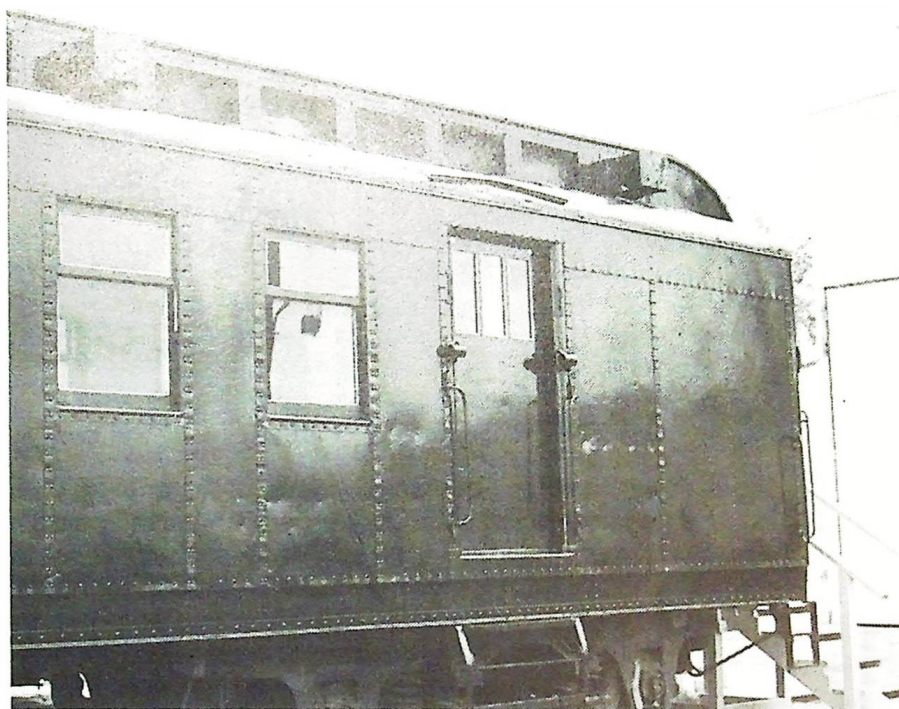
Ted Kornweibel, Supt. of Restoration

Remember the 1960s folk song, "Where have all the flowers gone?" To paraphrase, "Where has all the plywood gone?" The ugly plywood covering all the door and main window openings on each side of the car is gone, gone, gone; the RPO looks almost finished, from the exterior. What a morale boost for those who have labored so many months.

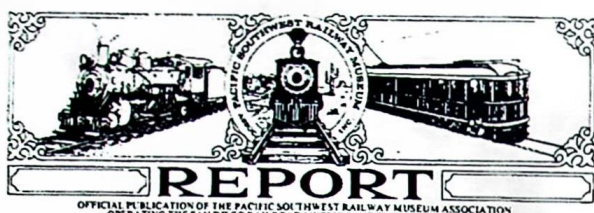
Some of the most serious damage on the interior of the car was inside each doorway, where years of rain leakage had completely rotted many floor boards. Now each doorway has new flooring which looks so great it's almost a shame it will be painted. (Unlike some RPO cars which have varnished floors, Santa Fe painted its car floors basic grey.) This project was done thanks to the precision wood-craftsmanship of the following: Museum veteran Frank Stites; first-time volunteer Martin Polacek, a year-long visitor to San Diego from Slovakia (Eastern Europe); Museum-member-but-new-RPO-volunteer Al Pearson; and Ted Kornweibel and his son Daniel. Thanks again to Frost Hardwood for giving us a tremendous price break on custom-milled, top-quality oak flooring. Frank and Ted are now completing repairs to other areas of floor damage. Here's the quiz of the month: How do you put a new piece of tongue and groove into the middle of an existing tongue and groove floor? First correct answer gets a guided-tour of the RPO car and the opportunity to drop a fiver into the donation can.

The new side doors are in place, working well and looking great. Ted Kornweibel glazed them, but the really tough job was the installation, which included some custom work from our team of metal magicians. Yep, Dick McIntyre and sidekicks Dick Cupp and Bob Haney came to the rescue again! We sure couldn't do without them. Thanks, guys.

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AT&SF RPO 74 newly installed sliding door and windows are shown in this February 1998 photograph by Frank Stites.



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SDRM Announces \$3 Million, Five-Year Planned Giving/Endowment Campaign

*The following articles are presented by the new
chairman of the Development Program Committee,
Jim Newland.*

As Chairman of the Development Program Committee (formerly Fund Development Committee), I have the honor of announcing the opening of the Planned Giving/Endowment Campaign. This campaign is the first step in reaching the goal of making the Museum financially self-sufficient. The campaign will establish the start of a multi-function, professional-quality Development Program for the Museum that will provide the sustained income necessary for meeting our immediate and long-term goals.

The purpose of the Planned Giving/Endowment Campaign is to create permanent fund income for operating our Museum. The financial struggles of the last few years only magnify the need to develop secure annual income sources. The Campaign has the auspicious goal of raising \$3 million in endowment and operating funds over the next five years. The creation of this annual income source is critical to the permanent survival of the institution into the next millennium.

The Museum's Planned Giving/Endowment fund has a basic overriding goal: The endowment of the operating costs of the Museum. These items include all paid-staff costs, insurance, rents, and other annual fixed costs. The funding of these budget items through endowment fund sources will free the Museum to direct the income produced by current sources, such as the demonstration trains, back into the operation and restoration of the Museum's collections and facilities.

Raising the \$3 million is not an easy task. Neither was building the Impossible Railroad, but with perseverance and hard work it was completed! Challenges are something this Museum has dealt with for its whole existence. The Development Program Committee and the Board have recognized the importance of making this campaign a success. The next five years will see a focused program to make this goal through gifts, pledges, planned giving methods, and pooled income funds (See attached article on the many ways to contribute). We hope you will be able to join us in making the ultimate gift for the Museum—its long-term financial security.

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Museum Biz: Interpretation, Part III

Interpretive Planning, The First Big Step

In the last issue we talked about all the varied Interpretive Activities that the Museum does, or could do. The decisions as to which interpretive activities the museum undertakes are found in the Interpretive Program and Plans. Interpretive programs and plans are part of the museum's larger planning process. While Strategic Plans establish visionary goals and prioritize major projects, and General Development Plans detail the physical plant to be built, the Interpretive Program outlines the interpretive themes, uses, and activities for the museum.

By definition the Interpretive Program is the summary overview of the proposed interpretive themes (storylines) and the methods for communicating them to the public that will be undertaken by the museum. An Interpretive Plan is a more specific plan that details the media and programs for a specific location, structure, and, in our case, a piece of rolling stock.

Although they are separate plans, the Interpretive Program should be developed in concert with the General Development Plan. Both require similar information in order to make logical decisions for development and use of museum resources. In our case, the Planning Projects that will be going on this year include both a General Development Plan and Interpretive Program for our Campo facility. When you see the content of the Interpretive Program as outlined, you will better understand the need to do both simultaneously.

The process for doing an Interpretive Program follows a standard pattern. First, is the inventory and evaluation of existing interpretive features and programs. This includes surveying all structures, large collections pieces (i.e., rolling stock), and available historic documentation, in order to identify the existing condition and availability of the museum's interpretive resources, limiting restrictions, and visitor and staff needs. This information is compiled from site visits, evaluation of collections (a process currently underway by the Board's Collections Committee), gathering of data from the Research Library/Archives, and input from staff and membership workshops.

After the data is compiled, the Program is drafted. The first section includes the interpretive Concepts that guide the museum's program. The Museum's Mission, its ethical standards for interpretation (see article on Board Policies), the Interpretive Period that we are striving to re-create, and the Museum's interpretive themes (storylines) to be presented are included here. The next section

deals with Interpretive Considerations. These include the layout and physical flow of visitors through the property; the types of signage (or no signage) that are appropriate; the preservation and use of historic structures; the preservation and use of collections such as large objects (rolling stock, etc.), small objects, and archival materials; the appropriate landscaping (including areas of historic restorations and designed and natural landscapes); necessary staffing required; and mitigation of off-property intrusions (modern features, sound, and other impacts). The identification of necessary Support Facilities for Museum Interpretation and Visitor Use Follows. This identifies the need for visitor services such as a Visitor Interpretation and Orientation Center, Interpretive Sales areas, picnic and recreation spaces, parking, and restroom/telephone facilities. It also identifies the museum's operational facility needs including curatorial space, archival storage, facilities maintenance and groundskeeping, train operations areas, train maintenance and repair areas, restoration work areas, and staff and docent support space. Guidelines for direction of Interpretive Activities are next. These include formal exhibits, historic structure or "rolling stock" museums, demonstrations, tours and talks, interactive programs, print media, and outreach programs. The last section deals with Interpretive Concessions. This includes the suitability of concession activities to the interpretive experience and the appropriate use of historic structures or collections for commercial purposes.

With the Interpretive Program outlined as above, the next step is completing site-specific interpretive plans for all buildings, sites, rolling stock, and programs. This is very important for identifying the specific treatments for such museum resources. Once the Interpretive Plans identify the storylines that these resources will help us tell, the appropriate treatments can be implemented. These treatments include the spectrum from full preservation and well researched authentic restorations to adaptive uses, such as with our historic reconstructions of the Lackawanna cars into SD&A coaches.

The formation of these essential planning documents is already underway. The Museum's Planning Committee will be gathering data and creating draft plans for staff and membership review and input this year. If you would like to provide input to the Interpretive Program, look for announcements in upcoming REPORT's for workshop dates, or attend the Museum Services Division meetings the last Wednesday of the month (call Division Chief Rich Borstadt at (619) 294-9321 for more information).

Jim Newland

Next time: Museum Collections Policies

Spring Cleaning

Well, spring is right around the corner. After overhearing several of our guests comment on the generally unkempt appearance of the grounds and buildings at Campo, it seems that some action is in order. So we have set Saturday April 25 as spring cleaning day (if the weather is uncooperative the date will be moved to the following Saturday May 2). We will all meet promptly at 8:30 a.m. to start our spring cleaning.

There is a lot of work to be done, and we need to get the largest turnout possible. Even if you do not normally volunteer, please consider taking part in the clean-up. Come on out and spend some time outdoors and see the changes to the Museum since last you were out to Campo.

The main area of concern is the weeds and trash along the tracks in the yard and around the Depot and parking lot. We plan to do a lot of cleaning and weeding in these areas. If possible, bring tools suitable for heavy weed removal and sturdy gloves. We are in particular need of gas powered weed whackers, heavy rakes, shovels, and hoes.

Please, no electric gardening tools; we have no way to run them more than a few feet from the buildings. If you plan to attend, please call me (Steve Kostelak 619-498-0925) before 2 p.m. any day of the week and let me know. Hopefully we will have a large crew for this project. Time permitting or a really large turnout, and we would like to do some cleaning inside the car barn as well.

Track Report

Well, things are finally looking up for the track gang. On Dec. 27, we finally got the go-ahead to begin repairs to Track 3, which has been out of service since 1991. Not taking any chances on someone changing their mind, the track gang fired up the gas powered spike puller and had the spikes pulled, rails removed, and a start made on the ties by the end of the day.

Thanks to good participation, the track gang made excellent progress through January despite inclement weather on most weekends. All ties on the curve were removed, the right of way was graded and the curve straightened somewhat. New ties were laid and heavier 90 lb. rail was brought down from storage and laid. This was one of the best efforts to date. I would like to take this opportunity to personally thank those who made this possible: Frank Denison, Fred Carnathan, Mike Reneau, Dick Cupp, Allen Andrews, Dick Hobsen, Rod and Alma Gilbert, Paul Lannen, Cliff Pennick, Troy Shelly, Rex and Matt Prescott, Chris Leenknecht, Myron Flores, Dick McIntyre, Karla Vonhuben, and Rich Warner, without whom progress would not have been nearly as quick. He provided the leadership, the expertise, and the equipment necessary to make such progress possible. In support of the track gang Dick Cupp, Norma Cupp, and Dick McIntyre were invaluable producing badly needed tie tongs and track trim storage pallets from some of the scrap available at Campo. Well Done Track Gang!!

Steve Kostelak

From The Training Officer

We have a continuing need for volunteer crews to operate and interpret our demonstration train from Campo to Miller Creek, and our International Trains from Campo to Tecate. The larger our crew pool is, the more fun and relaxing it is for our crew. Please consider coming out and joining us!

The entry level position is that of Trainman/Docent. You can start at any time, we just ask that you take the Trainman Class within the first six months of volunteering. The next class will be in the Fall. Contact the Training Officer for more details.

We will be offering a Brakeman/Diesel Fireman class in starting in May. The prerequisite for this class is 12 days as a trainman. The class is limited to 8 people. To register, contact the training officer.

If you'd like more information on our crew training program, contact Jim Baker, the Training officer, at 619-670-7441 or jimbaker@cts.com

Jim Baker

Wish List

Please send items for inclusion in the WISH LIST to Dick Pennick, c/o the Museum, or call him at (619) 463-2276. Potential donors have the option of providing either the listed item or equivalent cash to purchase the item or items. Call Dick for estimates of value for any item shown, if a cash donation is your preference. All such amounts will be held in appropriate restricted accounts for the item specified.

OPERATIONS

- *Shade tarps*—System of portable stanchions and canvas covers for use as a shade during outside restoration or maintenance work in the summer months at Campo.
- *Hand/power tools*—wide variety of hand and power tools, and their accessories, always needed for restoration and maintenance work at our Campo Operations Center. Let me know what you have.
- *Machine tooling*—Our Campo machine shop can always use tooling for machining work, Morse taper preferred but Brown & Sharp also usable, all sizes. Drill bits, boring bars, lathe tooling, milling cutters (horiz. and vert.), etc.
- *Machine shop tools*—We could use dial indicators, micrometers (any size, inside or outside type), calipers, thread gauges, etc. We could also use a medium-size milling machine, horizontal or vertical (the two small "home shop" sizes we have now are too small for a lot of our work).
- *Screws, nuts, bolts, nails, etc.*—all types and sizes always needed (non-metric preferred). Coarse thread, fine thread, machine screws/bolts, wood/sheet metal screws, expansion bolts.
- *Lubricants*—Variety of lubricants always needed (we're an operating museum, after all!). Our diesel locomotives, forklifts, loaders, cranes, air-compressors, etc. need oil changes periodically to keep them running well. Greases are also needed, various types and weights. NOTE: Due to current environmental regulations, only new, unused products can be accepted. Call me to discuss what you have prior to transporting to Campo.
- *Large oval journal-box oil cans.*
- *Steel cargo container(s)*—We are looking for one or more containers suitable for paint storage and petroleum product storage. I'm not sure what the standard sizes are, but they are probably 8' wide x 8' high in various lengths. We could use 20' - 30' long containers, the larger size, for grease, oil, solvent, etc. storage since a lot of this is in 55 gal. drums. Defense surplus may be a route for us here, and the Museum qualifies for surplus donations.

- *Shipping pallets*—New Museum Roadmaster Al Dillane needs a quantity of GOOD, SOLID, HEAVY-DUTY wood or steel pallets to assist in cleaning up the "East 40" storage area. Don't waste your time or ours with the light-duty models, and they should be in good to excellent condition. If necessary, the Museum can arrange for someone to pick up and haul to Campo. Call Steve Kostelak (498-0925).

STEAM

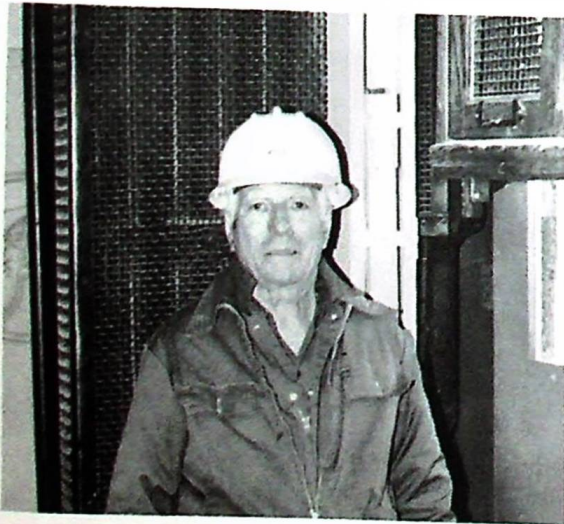
- *Grease gun*—We are still seeking a suitable heavy-duty grease gun that will handle the hard "pin" grease used for the rod pin grease fittings. They are referred to in the trade as "large-button-head (not zinc fitting) Alemite guns" and generally take two people to run them because of their size and weight. In the steam days, and in the larger steam shops today, air-operated guns are employed. Other smaller steam operations, like ours, use a hand-operated screw-jamb type which will do the job but requires more effort. If you have either type, we'll gladly accept it. If you have a big gun that was designed for the heavy-equipment industry that will accept a large-button-head adapter, let's talk.
- *Backpressure gauge*—We are still looking for a working or restorable backpressure gauge, which measures the pressure on the front side of the steam piston at the end of a power stroke and which assists the engineer in the proper setting of the steam valve cutoff. Two types were made during the steam era: simplex type (which measured only the backpressure) from 0 - 15 psi or so, and the duplex type, which was essentially two gauges in one—a steam gauge measuring boiler pressure and a small window in the face that registered the backpressure. We would prefer an original gauge from some long-scrapped engine, if we can find one. A loan would probably be acceptable.
- *Staybolt tops*—12 tpi, tapered or straight.
- *Long-neck engineer's oil cans.*
- *Hi-temp/high pressure piston & valve packing*—Any size (non-asbestos).

LIBRARY

- **File cabinets**—3 or 4-drawer, letter or legal size, wood or metal (metal preferred).
- **Flat files**—Metal or wood. These files are for storing items that must be stored flat, such as maps, drawings, oversize photos or art work, etc. Available in several sizes: 20x30, 24x36, etc.
- **Acid-free storage items**—boxes, file folders, magazine boxes, etc.
- **Poor's and Moody's Manuals of Railroads**—Any year. These are corporate listings of railroad companies, published for 100 years or more, providing concise company data for each company.
- **San Diego railroad paper items**—We are always in need of books, timetables, passes, photos, train orders, dispatcher's train sheets, maps, drawings and other operating records from San Diego area railroads over the last 120 years. One item we don't have in the reference collection is an original or copy of an SD&A/SD&AE Railway steam locomotive folio book, showing the key specifications and diagrams of each steam locomotive on the roster.
- **Volunteers**—We need 'em! For cataloging, filing, etc. Some computer literacy helpful but not required. This position ready-made for the history buff!

AT&SF RPO 75 February 1998

Dick Cupp is shown below in this photo by Frank Stites



RESTORATION

- **Steel pipe scaffolding**—There is a continuing need for us to own a quantity of stackable metal scaffolding and, if possible, the wood planking to go with it. If you know someone in the construction or scaffold business you can put the bite on for a donation, let me know. As it stands now, it is difficult to perform some of our work within approved safety guidelines due to a lack of the proper equipment.
- **Personal fall-restraint safety harnesses**—The best ones are a full-body harness akin to parachute harness with an attachment ring on the back to clip a suitable lanyard to. The other end of the lanyard clips to some immovable object to arrest an accidental fall. The simpler ones are just a waist belt with a lanyard ring.

MAINTENANCE-OF-WAY

- **Railroad gradall**—We can't afford to buy one of these, but if anyone knows where we can find a 600, 800 or 1000 model to borrow or seek a donation of, let me know. These are rubber-tired units with retractable flanged wheels similar to "Hi-rail" equipment.
- **Gas-powered rail saw.**
- **Gas-powered rail-drilling machine.**
- **Gas-powered spike puller.**

PERSONNEL

- **"Jack-of-all-trades"**—Your name doesn't have to be "Jack" but our Operations Supt., Mike Reneau, could use some additional warm bodies to help him with the almost overwhelming number of tasks that confront him every weekend at Campo. He can use people who are self-starters, patient, good with their hands, who enjoy fixing or repairing things that go wrong, and who can be available, mostly weekends, on a more-or-less regular basis. Some on-the-job training may be available. If interested, leave your name and phone number for Mike at the Museum office. Your pay rate will be exactly the same as Mike's: zero!
- **Firefighter**—We are losing our volunteer firefighter/paramedic to the BNSF Railroad and a professional career as a mainline Conductor. If you have any training or background in firefighting, fire suppression or similar training and would like to be involved in overseeing the Museum's fire prevention and response capability, contact Denby Jones c/o the Museum office.

Senior Citizens Transform RPO Car

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It's always fun to meet new railfans who appreciate restoration, so it was a particular pleasure to welcome Joe Shelley and son Troy into the RPO car. Joe has recently been transferred by the Navy from Hawaii, where he gained lots of railroad Museum experience. After looking around SDRM for awhile, he and Troy came back to the RPO to lend a hand, and we hope to see them back again soon. While we're on the subject of the Navy, it's sad to report that faithful restoration volunteer Kevin Dudenbostel got his wish to get off submarines, but he's been transferred to a recruiting station in Houston. Sure hope he finds another Museum to which to lend his many talents. Good luck, Kevin, and let us hear from you.

Now about that headline. The Restoration Department is anchored by five regulars: Dick McIntyre; Bob Haney; Dick Cupp; Frank Stites and Ted Kornweibel. The last of the five (guess which one) just crossed that great divide and is now officially a senior citizen (you can get a cup of coffee for a quarter at McDonalds with that distinction.) This is probably the only all-seniors crew in the Museum, although you'd never know it by looking at what they accomplish. Give a hand for the geezers. Next time you're up by the car bam, tell them what a great job they're doing. And no, we don't want to hear any "Old railroaders never die" jokes.

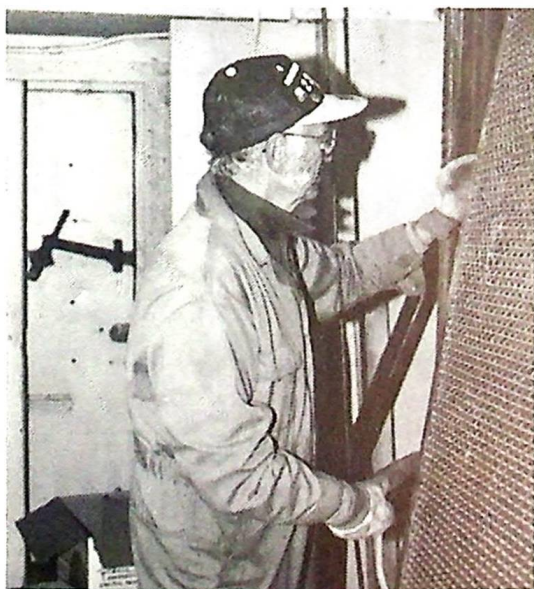
From The Executive Director's Desk

There is a great deal of attention being paid to giving in this issue of the REPORT. It is my privilege, in my position with the Museum, to encounter a lot of giving in many forms. I would like to share some of the manifestations of giving which I see.

The greatest giving at the Museum does not show up in our fund-raising accounts. It is found instead in the operations of a normal weekend at Campo. People are often impressed that our train crews are volunteers, but that is only part of it. First, how much time and effort it takes just to become qualified and certified as a member of the train crew (few realize until they try it!)—and then to keep the certification current. Second, there are many people at Campo who are essentially invisible to our passengers but who are indispensable to our operations. Perhaps the passengers may get a glimpse of those who maintain the tracks or the equipment, but it is hard to understand from such a casual look just how much effort and expertise goes into each component of the work that is done. We are often the recipient, as a Museum, of a lifetime's cumulative skill and experience, people who have thirty, forty or fifty years as skilled tradespeople. We even have the ultimate: railroaders who spend their leisure time or retirement years helping to portray the story of railroading.

Giving goes beyond just railroading, however. And the best of our giving happened on January 10, 1998. It's a story worth telling.

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AT&SF RPO 74

February 1998

Left: Don Bellis

Right: Bob Haney

Photographs by Frank Stites



Last fall, our Operations Superintendent, Mike Reneau, mentioned that it would be a really good and meaningful thing to do if we could run a Christmas train to Tecate with gifts for the poor children in the city. We all thought it was a wonderful idea, but with limited planning time, we didn't think we could find the gifts necessary for such an undertaking.

Then one day, Charles Covell from the San Diego Trolley called and suggested the same idea. The difference was that Charlie and his girlfriend Margaret Smith felt they could find the gifts, and in fact Margaret went to work on it full-time for a month or so. The whole plan was laden with difficulties; to put together an endeavor such as this required the cooperative and integrated efforts of a large number of people from several dozen organizations in two countries with two separate languages and ways of doing things.

Yet the need was there among the poor children of Tecate. The good will was evident on all sides to help make it happen. And certainly the Museum had the desire to give back to the people of Tecate in whatever way we could, since they have been so good to us and have welcomed us so warmly and helped us in so many ways. What better way than to share with those in Tecate who were as rich in their welcome as others but had fewer material goods? With trepidation, but with the feeling that this was an opportunity we could not deny, we committed to doing the trip.

Charlie and Margaret went to work, and the gifts began to pour in. I contacted people in Tecate at the "DIF," and arrangements were made for the children to be present. Plans for the operation of the train were made at the Museum. It sounds simple, but even arriving at a date which worked for all parties was a major undertaking. I will spare you all the details; suffice it to say that literally upwards of seventy people put significant time, effort and money into this. A large party of people met to put the gifts into 3,000 packets, divided by the ages and sexes of the children who would be receiving them.

Culture intervened on our side: while most Christmas events and gift-giving happen on this side of the border before Christmas, the big day in Mexico is January 6th, Three Kings Day, a commemoration of the three wise men who brought gifts to the Infant Jesus. This meant extra time to plan and the ability to garner unused Christmas inventory from this side of the line.

Finally, the great day arrived. The worriers scanned the skies, since it had been raining most of the week and more was forecast. Ricardo Olguin Contreras, director of the Tecate DIF and the major organizer of the event in Tecate, assured me that it would never think of raining in Tecate on a cause such as this. And sure enough, the rain

held off, although it was muddy underfoot from Mother Nature's efforts of the previous night.

Several people on board the train told me that tears came to their eyes when they saw the sight: as the train rolled into Tecate station, children were visible across the entire horizon, 3,000 of them, excited, anticipating, but patient and orderly. Some of the children had been waiting for three hours.

The linkup between the Tecate ground forces and the train was seamless. As the gift crew on the 1509 swung into action, the royal trio, resplendent in royal raiment and led by "King" Mitch Beauchamp (vice-mayor of National City when not royalty), took their places on the back platform. The head of the line arrived at the steps of the car, carefully shepherded by the DIF folks and eventually guarded by an ad-hoc angel host of parents who donated several hours of their own time, on the spot, to keep order. As each child climbed the steps, one of the kings gave them a packet handed through the car by a "bucket brigade" of volunteers, their hand was stamped to avoid repeat "customers," and they received an orange as they left to the music of a volunteer band.

Three hours later, the last of the kids climbed the steps, several hundred mothers were given blankets, and the weary volunteers headed for home. Alfredo Ferreiro, the Mayor of Tecate, had been there to give his support, as always (the only politician I know who is as unassuming in his ever-present assistance as our Senator Jim Mills), along with his wife, who efficiently oversees the DIF operation.

All are agreed we should do this again next year. It was indeed a worthy experience in giving, all the more so because usually our giving centers on ourselves, whereas this time the giving went outside the Museum.

Following Up On The Board Retreats

The last REPORT updated the work accomplished at the two Board of Trustees retreats. This included introducing the framework for setting up the Museum's mission, standards, planning, and development program. At the November Board meeting, the Trustees took action to move forward on these programs. The following are the newly adopted Mission Statement and Statement of Professional Ethics and Standards. These policies define the purpose of the Museum and outline the standards for operation. The Board also took action to implement a

fully integrated planning procedure and development program (See article on Planned Giving/Endowment Campaign). Presented here are the approved policy statements.

11/97

San Diego Railroad Museum's
MISSION STATEMENT

The San Diego Railroad Museum's (corporate name, the Pacific Southwest Railway Museum Association, Inc.) **purpose is to educate the public to the history and legacy of rail transportation and commerce through the administration of a professionally orientated railroad history museum.** As such, it is dedicated to preserving the physical legacy and the experiences of **railroad history.** Programs address the historical, social, economic, and technical impact of the railroad with particular emphasis on railroads of San Diego County and the larger systems with which they connect in the United States and Mexico. The Museum stresses a living-history approach in interpreting railroad history to the widest possible audience.

SDRM's programs are designed to provide interpretive experiences to the public to facilitate interest, recognition, and appreciation of the significance of railroad heritage through such interpretive programs as:

- Operation of a **"living history"** demonstration railroad
- Maintenance of a **Research Library/Archive** available to the public
- Operation and Maintenance of **Educational and Interpretive facilities and programs for the benefit of the public**
- **Preservation of historic railroad artifacts and rolling stock for public display and education**

San Diego Railroad Museum's
Statement of Professional Ethics and Standards

Museum Purpose

The San Diego Railroad Museum's (corporate name, the Pacific Southwest Railway Museum Association, Inc.) purpose is to educate the public to the history and legacy of rail transportation and commerce through the administration of a professional-standard railroad history museum. As such, it is dedicated to preserving the physical legacy and the experiences of railroad history. Programs address the historical, social, economic, and technical impact of the railroad with particular emphasis on railroads of San Diego County and the larger systems with which they connect in the United States and Mexico. The Museum stresses a living-history approach

in interpreting railroad history to the widest possible audience.

Introduction

The San Diego Railroad Museum (SDRM) is a non-profit institution comprised of individuals acting in the public trust, engaged in the practice of railroad history, and representing a variety of disciplines, expertise, and professions. The SDRM expects its members and staff to abide by the ethical and performance standards adopted by the appropriate discipline-based and professional organizations (i.e., history museums, archives, and railroad history museums). In addition, members of the SDRM shall meet the ethical standards of this Statement. Demonstrated failure to meet these standards may result in appropriate disciplinary action—that action may include loss of membership or staff position.

Collections

Historical collections, including buildings, structures, or large collection pieces (i.e., rolling stock), are the bedrock upon which the practice of history rests. SDRM members shall always act to preserve the physical and intellectual integrity of the museum collections.

- A. SDRM shall maintain and abide by comprehensive collections policies officially adopted by the SDRM Board of Trustees.
- B. Priority shall be given to the care and management of collections.
- C. Collections shall not be capitalized or treated as financial assets.
- D. Collections shall not be deaccessioned or disposed of in order to provide financial support for institutional operations.
- E. Collections shall be acquired, cared for, and interpreted with sensitivity to their cultural origin.

SDRM Statement of Professional Ethics and Standards
cont.

Historic Property Treatments (Preservation, Restoration, Rehabilitation, Reconstruction)

Professional standards for treatment of historic properties such as buildings, structures, and historic landscapes have been in practice for several decades (*Secretary of the Interior's Standards for Treatment of Historic Properties*, rev. ed. 1995). Standards for Railroad Museums to implement for large collection pieces such as railroad rolling stock or equipment (not technically buildings, but not small collections pieces either) have not been fully developed as industry standards. However the following ethical guidelines provide the basis for appropriate use and treatment of such specialized large collection pieces.

- A. SDRM staff shall provide appropriate treatment to designated (as identified through the SDRM Interpretive Program and Plans) historic buildings, structures, and landscapes as outlined by the *Secretary of the Interior's Standards for the Treatment of Historic Properties*, 1995. (ATTACHMENT A)
- B. The SDRM Board shall approve and the SDRM staff shall develop and incorporate an appropriate treatment policy for its collections of Category 1 (full and accurate preservation) large collections pieces. The primary goals of preservation of original fabric; repair before replacement of original fabric; only implementing historically documented restorations of equipment; and other appropriate treatments (Preservation, Restoration, Rehabilitation, and Reconstruction) shall be the guiding directives for these policies.
- C. The SDRM Board shall approve and the SDRM staff shall develop and incorporate an appropriate treatment policy for its collections of Category 2 (adaptive use) large collections pieces. The primary goal of implementing only historically accurate rehabilitation and reconstructions of such collections should be following appropriate treatments (mainly Rehabilitation and Reconstruction) as the guiding directives for these policies.
- D. The SDRM Board of Trustees shall call for the creation and implementation of a Museum Interpretive Program to direct appropriate planning treatment and use of collections pieces, and museum facilities.

Interpretation

Historical interpretation may be presented in a variety of formats.

- A. All interpretations must be based upon sound scholarship and must accurately reflect the facts as they have been documented.
- B. Interpretation must take special care not to dilute or ignore historical accuracy and inclusiveness for the sake of public entertainment and popularity.
- C. Interpretation must accurately reflect the cultural context of the subject matter.
- D. No interpretation shall use collections in a consumptive manner except as categorically delineated (such as Category 2 collections) and specifically allowed within the collections policy.
- E. The SDRM Board of Trustees shall call for the creation and implementation of a Museum Interpretive Program to direct appropriate Interpretive goals

Management

The primary responsibility for governance, institutional policies, financial stability, and legal accountability of the SDRM rests with the Board of Trustees. Operational responsibility rests with the staff. Individuals employed in the practice of history deserve respect, pay, and benefits commensurate with their training, dedication, and contribution to society. Volunteers deserve the same consideration as their paid colleagues.

- A. The SDRM must have a personnel policy, adopted by the Board of Trustees, which is distributed to all staff, documenting the terms of employment.
- B. The SDRM has the responsibility to engage personnel, including volunteers, who have appropriate training and expertise and to provide them with opportunities for additional training necessary to continue to meet their responsibilities.
- C. The SDRM employs an Executive Director. That person alone is responsible for the employment, discipline, and release of other staff, subject to established personnel policies.
- D. The SDRM shall maintain financial records from which accurate information can be generated to manage the organization in a fiscally sound manner as a matter of public trust.

Revenue Producing Activities

Activities that involve the marketing and sale of products, programs, services, and facilities are acceptable ways to produce support revenues and increase public awareness of and participation in SDRM activities. No such activities shall be undertaken that violate or compromise the integrity of SDRM's mission, the ability of SDRM or its individual members to meet professional standards, or the SDRM's non-profit status. Control of a product (e.g., exhibition, publications, programs) shall neither be delegated nor abrogated to outside parties in order to obtain financial support.

Conflict of Interest

The SDRM exists to serve the public interest and must always act in such a way as to maintain public confidence and trust.

- A. All Board members, administrators, volunteers, and staff members shall avoid carefully the reality and the appearance of using their positions for personal gain.
- B. Board members, volunteers, and staff shall refrain from personal collecting in any manner that conflicts with the interests or credibility of the SDRM. The SDRM is encouraged to obtain statements of personal collecting interests before individuals become associated with the SDRM.

- C. Collections shall not be made available to any individual on any basis for personal use, either on or off the premises, or for any other purpose contrary to the adopted collections policies.

Social Responsibility

All members of the SDRM shall ensure actively that the variety of American cultural experiences in all programmatic and operational activities is represented accurately. The SDRM expects its members to assist the field in becoming more representative of our diverse society through equity in staffing, training, collecting, programming, and marketing. All professional activities, programs, products, and services shall be provided in such a way as to maximize access to all people.

Intellectual Freedom

Historical Scholarship and interpretation demand intellectual freedom, with no qualification. SDRM members shall refrain from any activity that willfully restricts or discredits free and open exploration and interpretation of the human experience.

Jim Newland

Endowments, Planned Giving, Pooled Income.

What this Means and How You Can Contribute.

Much of the information for this article comes from a presentation made to the Development Committee by Ms. Cynthia Stieger, a professional planned giving fund-raising consultant. Additional input comes from Mike Newman, our new volunteer Planned Giving Director.

ENDOWMENT FUNDS

Endowment funds are funds that are set aside in perpetuity. They are permanent Funds in which the principal is not spent. The purpose is to generate income (usually interest payments) for the support of the Museum. A spending policy is developed to maximize the draw on income. Money is continuously added to the principal to fund additional Museum programs and costs as well as to keep up with inflation. The benefits of endowment funds for the Museum are numerous:

- Provide stability to Museum financial health
- Help to maintain quality levels in programs and services
- Allow for flexibility to meet changing needs
- Provide funds with which to balance budget

- Establish a permanent funding source for Museum operations as compared to often unstable funding sources
- Create a base to encourage and enhance other fund-raising efforts

Raising the Funds

There are several ways in which to obtain endowment funds. The most obvious is direct donations. Those wishing to donate funds for the Museum endowment can simply earmark their gift for a restricted Endowment Fund. The opening of the Museum's new campaign provides a venue for those wishing to contribute such funds.

PLANNED GIVING

As noted there are numerous ways in which to give funds to support the Museum's operations. Many of these are lumped into the category of "Planned Giving." Planned giving programs range from simple to complex. The basic concept is to have the Museum offer programs and support that will enable members and donors to realize the greatest possible benefits from their gifts. Examples of the varied planned giving strategies that donors can participate in include:

- Outright Gifts
- Bequests
- Life Estates
- Gifts of Insurance
- Charitable Remainder Trusts and Unitrusts
- Charitable Lead Trusts
- Gifts of Securities
- Gifts of Real Estate
- Gift Annuity Programs
- Pooled Income Funds

The choice of which technique is best for the donor is up to the donor. Some of these techniques, such as Gift Annuities and Pooled Income Funds, provide donors with additional benefits. Deferred giving arrangements such as Charitable Trusts and Pooled Income Funds allow donors to retain all income rights during their lifetime on the gift. Although the Museum would receive an immediate gift of an "interest" in the donative property, the "enjoyment" of the property by the organization is deferred to a future time. As such, Planned Giving offers many substantial benefits to donors, including:

- Charitable Income Tax Deductions
- Elimination of Capital Gains Tax on Appreciated Property
- Reduced Estate Tax Liability
- Professional Investment Management
- Diversification
- Higher Investment Yields

Continued on back



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POOLED INCOME FUNDS

Pooled Income Funds are one of the most popular ways for individuals to donate to non-for-profit institutions. Pooled Income Funds benefit individuals who wish to include the Museum in their gift plans but still retain a lifetime income stream from the gift. Basically, the fund is a trust fund in which the gift is "pooled" with other donations to the organization. These funds are then invested by a trustee that distributes an income to the donor for life. After that period of time, the amount remaining in the account is transferred from the fund to the Museum.

Income from the gift is paid to the donor, or other designated beneficiaries, quarterly. The trustee of the fund, normally a trust company or trust division of a bank, provides the advantage of professional investment management and administration. Pooled Income Funds thus provide additional benefits to donors such as significant Income Tax deductions, higher possible investment yields, zero capital gains tax, reduced estate tax liability, and professional investment management advice.

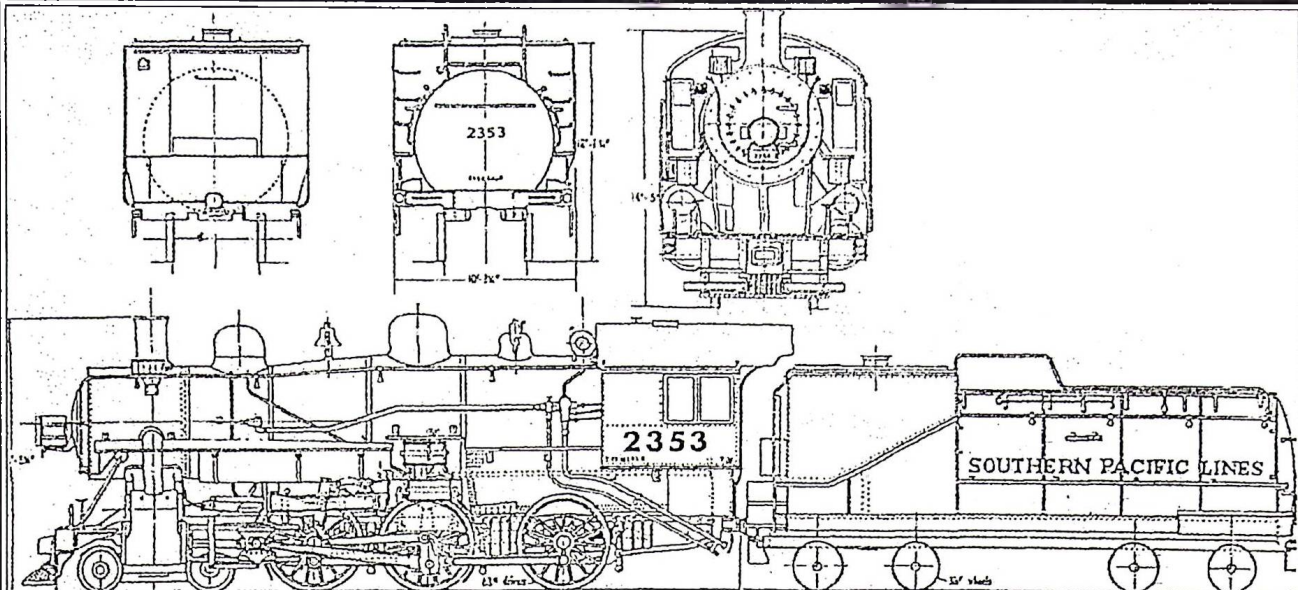
How to give to SDRM's

Planned Giving/Endowment Campaign

The Museum has two volunteer consultants who can provide the support for any of these donation possibilities. Mr. Chase Magnussen offers donors guidance on how to give gifts of real estate to the Museum. All other planned giving techniques are handled by our new volunteer Planned Giving Director, Mr. Michael Newman. Both of these gentlemen have years of experience in these fields and have offered their time and expertise to help make this program a success by matching donors with the strategy that best benefits both them and the Museum. For more information on how to become involved in Planned Giving with the San Diego Railroad Museum, please call the office at (619) 595-3030.

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CAMPO TO MILLER CREEK

MARCH 21, 22

APRIL 11, 12, 25, 26

MAY 9, 10, 23, 24

SEPTEMBER 26, 27

OCTOBER 10, 11, 24, 25

NOVEMBER 7, 8, 28, 29

DEPART

RETURN

11:00 AM

12:30 PM

2:30 PM

4:00 PM

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San Diego Railroad Museum

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