Collection # M 0834 OM 0421 OMB 0099 BV 3507-3515

# CHICAGO, SOUTH SHORE & SOUTH BEND RAILROAD COLLECTION, 1906–1989

**Collection Information** 

**Historical Sketch** 

Scope and Content Note

**Series Contents** 

**Cataloging Information** 

Processed by

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Manuscript and Visual Collections Department William Henry Smith Memorial Library Indiana Historical Society 450 West Ohio Street Indianapolis, IN 46202-3269

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#### COLLECTION INFORMATION

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Visual Materials: 7 posters

COLLECTION

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1906-89

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RESTRICTIONS: None

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ALTERNATE FORMATS:

RELATED Chicago, South Shore & South Bend Railroad Photographs, HOLDINGS: 1926–1986 (P0424); C. Edward Hedstrom Six Decades of

Service on the South Shore Line, Oral History Interview, 1990 (BV 2639–2640, CT 0572–0580); Chicago, South Shore and South Bend Railway Records, 1924–1944 (SC 2313, OM 0062)

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#### HISTORICAL SKETCH

The South Shore Line has had its successes and failures throughout the years and has miraculously survived as the country's last electric interurban railway. The modest beginnings date from 2 December 1901 when the Chicago & Indiana Air Line Railway was incorporated, and from the start the company had big things in mind. The original charter called for construction of a railroad extending all the way from South Bend to East Chicago, Indiana, and before the first local line opened in East Chicago they had secured the necessary franchises for operation through the streets of South Bend, New Carlisle, and Michigan City. By September 1903 the company's two suburban cars covered a distance of less than four miles between East Chicago and Indiana Harbor, Indiana. A 1904 corporate name change, to the Chicago, Lake Shore & South Bend Railway, signaled the owners' intentions for direct service to Chicago as well.

By the fall of 1906 Cleveland financier James B. Hanna, one of the South Shore's promoters and the company's first president, had increased the company's capitalization and obtained the necessary financial backing for construction of new lines between South Bend and Hammond, Indiana. Regular service began September 1908 on the "Hanna Line" between South Bend and Hammond, and within a few months the line stretched into Illinois. The company added carload freight service in 1916 which proved to be somewhat lucrative. But despite the modest growth of its freight business and the success of its excursion traffic, the South Shore's overall traffic remained disappointing.

After 1921 the railway's fortunes began a rapid decline. Passenger traffic had dropped by twenty-five percent and freight carloads by a third. By 1924 the Cleveland Trust Company, which had financed the construction, was eagerly looking for a way out. Even though the South Shore was in bad shape it appeared to represent a worthwhile investment because of its potential for development in both freight and passenger traffic. The next year Samuel Insull, Jr., acting for Midland Utilities Company, the umbrella for a number of Insull interests including the Chicago North Shore & Milwaukee and the Chicago Aurora & Elgin, entered into negotiations, bought the railway, and promptly renamed the line Chicago South Shore & South Bend Railroad.

The new Insull management, with the objective of developing a higher standard of freight and passenger service immediately began a massive reconstruction program of the deteriorated property. Soon after the new management took charge, the South Shore entered the bus business, as much to forestall competition as to develop valuable feeders to its rail service. By the end of 1925 the company was operating 28 more daily trains than the year before and the remarkable growth continued for the next four years.

The late twenties were a time of unparalleled success for the interurban and the effects of the Wall Street crash of 1929 were not immediately felt by the South Shore. Operating results for 1930 were slightly off the record level of 1929, but by 1931 the effects of the depression were felt and cuts in passenger service were ordered. The fortunes of the company continued to deteriorate, and on 30 September 1933 the South Shore entered bankruptcy.

The bleak traffic figures of 1933 were the worst the depression had to offer and by 1937 the gross revenues were back up. By early 1938 a plan of reorganization had been worked out and the bankruptcy had ended. Jay Samuel Hartt, a Chicago consulting engineer and Midland Utilities executive, headed the reorganization and remained president of the South Shore for the next twenty-one years.

With the outbreak of war in December 1941 the heavily industrialized northwestern Indiana region geared up for maximum wartime production and traffic on the South Shore set one record after another. By 1943 passenger traffic had doubled from 1941, and in 1945 the annual passenger volume had passed the six million mark. After the bonanza of high traffic volume of the war years, passenger traffic fell off fairly sharply for the next several years, stabilizing from 1950 onward at an annual level of 4 to 4.5 million — about a million passengers more than the peak years of 1929. The decline in passenger revenues, however, was more than offset by the South Shore's continued growth as a freight carrier, reaching a level of close to \$3.5 million by 1950.

In the decade following the war the South Shore made improvements to nearly every area of the company. A car lengthening program that had started during the war was continued after it, with cars being rebuilt and modernized with lengthened picture windows, air conditioning, and new seating and interiors. Improvements were being carried out with an upgrade of the freight motive power roster that almost entirely displaced the steeple cab units of the 1920s with a fleet of massive locomotives. Steady improvement to the physical plant continued too with the regular use of welded rail for its normal rail replacement program.

During the mid-1950s the South Shore carried out the greatest single line improvement since the 1920s Insull era—the construction of a five-mile relocation of the railroad's main line in East Chicago, Indiana. At almost the same time the Indiana Toll Road Commission was seeking an economic route through the same area for its east-west toll highway across Northern Indiana. The Commission proposed that they and the South Shore join in joint construction of their two routes utilizing the right-of-way already acquired by the railroad, an arrangement that was to prove mutually advantageous.

Despite the benefits of the newly completed line, which increased the number of on-time trains and decreased running times, the South Shore had some bumpy years in the late 1950s. Due to an upward trend in operating costs and continual declines in passenger traffic, the net income began to drop which led to a deficit of \$84,000 in 1958, and \$175,000 by 1960. New president William P. Coliton set things right in early 1961 by launching a vigorous cost reduction and traffic expansion program. An internal reorganization — dropping unprofitable operations, and switching from railroad operated restaurants to coin concessions — helped to convert the annual loss into a profit.

One source of increasing concern during the early 1960s for the South Shore line was the growing trend toward large scale railroad mergers. Several pending mergers among South Shore connections threatened it with an unfavorable competitive situation. Also, because the South Shore was independent it was unable to guarantee a large car supply to Bethlehem Steel who in turn refused to grant the line access to its Burns Harbor plant so long as it remained an independent road. Early in 1965 the Chesapeake & Ohio, with the South Shore's blessing, applied to the Interstate Commerce Commission for permission to acquire South Shore control. The application was approved, and on 3 January 1967 C&O assumed control of the line, subsequently acquiring ownership of 94 percent of the railroad's outstanding stock shares.

The primary reason for the South Shore's affiliation with a larger carrier was to increase its competitive position for freight traffic in the face of continuing mergers in the East, and to assure a supply of cars that would permit the line to effectively serve the new Bethlehem Steel plant. This was achieved and by the early 1970s South Shore's freight earnings accounted for close to 70 percent of total operating revenues. The losses from passenger traffic continued to mount however, and in 1975 the passenger deficit hit a high of \$2.6 million. Adding more urgency to the situation was the 50-year-old passenger-car fleet, and by 1976 the railroad was ready to end all passenger service.

In March the railroad announced that it would put a million dollars into interim equipment repairs to buy time for a public agency to come up with a new-car program. If this program did not materialize in six months then company president Albert W. Dudley said they would have no choice but to pursue a course of action leading to cessation of all passenger operations. Nothing happened and by the end of 1976 the railroad had filed a petition with the Interstate Commerce Commission to end all passenger operations. The ICC replied in April 1977 that the South Shore should continue running its passenger trains for another ten months, during which time they expected the state of Indiana would have enough time to take steps to save the service. This did the trick and that same month the Indiana General Assembly passed legislation that enabled the four Indiana counties through which the South Shore operated Lake, Porter, LaPorte, and St. Joseph, to form the Northern Indiana Commuter Transportation District. The NICTD was the agency through which federal, state, and local funds could be made available to support South Shore passenger service, but they were not given any taxing authority which has become a shortcoming that has handicapped the agency's efforts to rebuild the railroad ever since.

In 1979 the NICTD developed a program whose principal component was a completely new third generation of modern cars for the passenger service. During the five-year period between then and when the new cars could enter service the South Shore continued a program of structural reinforcement for the old cars, and made improvements to electrical and braking systems to improve their resistance to severe winter-weather conditions. In addition to the purchase of new cars, the NICTD's capital improvement program included major upgrades to the railroad's power supply and equipment maintenance capacity. All these improvements paid off and by 1983, as the railroad completed its transition to the new passenger fleet, traffic was back up to 2.5 million annual riders, its highest level since 1970.

Looking for ways to insure the South Shore's passenger service the NICTD began to consider outright ownership of the railroad which offered the possibility of offsetting the passenger-service deficit with profits from freight operation. Early in 1984 the Indiana General Assembly passed legislation that would permit NICTD to acquire ownership of the railroad. Their hopes were dashed, however, in September 1984 when the C&O sold the railroad to the Venango River Corporation, a group of five Illinois and Indiana businessmen. This new arrangement started out promising with the NICTD signing a purchase-of-service contract with Venango River, the owners aggressively seeking to recapture some of the local and overhead freight traffic the railroad had lost, and talk of extending westward to tap new freight connections at Chicago.

Things turned sour in May 1987 when Venango River tried to expand their railroad empire with the purchase of 631 miles of line from the Illinois Central Gulf, which essentially represented the former Chicago & Alton. The price for the new line was too high and the revenues too low, and by April 1988 the line had filed for bankruptcy and was eventually sold off. Things were not going well for the South Shore either. The railroad had loaned \$4 million to the line before it went bankrupt, and freight service proved to not be as profitable as expected. By the end of 1988 the cash short South Shore had defaulted on principal and interest payments, and Citicorp, its principal creditor, called in its loan and took over management of the line. Venango put the South Shore up for sale, and in April 1989 filed for Chapter 11 bankruptcy protection.

As it turned out, Venango's bankruptcy gave NICTD another chance to acquire the South Shore, and a new era began on 1 January 1990. The investment-banking firm Anacostia & Pacific Company paid to take over the railroad from Venango in a complex financial arrangement. The deal provided that NICTD would eventually acquire ownership of all the railroad's Indiana trackage and facilities. While the South Shore ownership was going through these turbulent times, NICTD and other public agencies continued a program of capital improvements for passenger service.

Since it's near demise in the late 1970s, the South Shore has been transformed into a modern, efficient commuter rail line, carrying an average of 12,000 passengers each weekday to their jobs in Chicago. The public awareness of the

railroad's unique historical status as the country's last electric interurban has grown, and the South Shore's future seems secure.

#### Sources:

Middleton, William D. *South Shore: the last interurban*. Bloomington: Indiana University Press, c1999. (General Collection TF725.C55 M53 1999)

Moonlight in Duneland: the illustrated story of the Chicago South Shore and South Bend Railroad. Bloomington, Ind.: Indiana University Press, c1998. (General Collection Folio HE2791.C6849 M66 1998)

#### SCOPE AND CONTENT NOTE

The collection has been separated into five series with the papers in each series being arranged by topic and then chronologically.

- Series 1: Operating Papers, 1906–1989 consists of papers relating to the day-to-day functions of the South Shore. It includes correspondence between employees, maps of routes, articles and clippings about the railroad, employee service records cards from 1937–57, passenger and freight tariffs, and accident reports among other records.
- **Series 2: Board Meetings, 1939–1987** consists of the minutes and supporting papers from board of directors and stockholders meeting. There are also proceedings of the annual shareholders meetings from the early 1960s and 1970s.
- **Series 3: Financial Papers, 1909–1987** consists of papers relating to financial matters at South Shore. It includes annual reports from 1925–72, accounts paid records cards from 1909–24, and papers regarding investments made by the South Shore.
- Series 4: Interstate Commerce Commission Filings, 1923–1988 consists of the agreements and petitions filed by the South Shore to the ICC. There is also correspondence regarding some of the filings, testimonies from South Shore employees, ICC finance dockets, and Venango River Company filings.
- Series 5: Posters, 1925 consists of seven posters used in publicity efforts for the line during the late 1920s. A series of colorful posters was produced depicting places along the route, especially the Dunes and the Dune State Park. They were exhibited in stations and on "L" platforms in Chicago, enticing the viewers to travel to beautiful spots along the South Shore Line. The poster art covered topics such as the four seasons, football games, destinations, and general views of northern Indiana.

CONTRAINTED

#### **SERIES CONTENTS**

CONTENTE

## **Series 1: Operating Papers**

CONTENTS	CONTAINER
Articles of Association and By-Laws, As Amended, 1 June 1926	Box 1, Folder 1
Articles of Association, 1 Jan. 1929	Box 1, Folder 2
By-Laws, As Amended, 1 Jan. 1929–30 Apr. 1944	Box 1, Folder 3
Articles of Reorganization, 18 Sept. 1929	Box 1, Folder 4

Box 1, Folder 5
Box 1, Folder 6
Box 1, Folder 7
Box 1, Folder 8
Box 1, Folder 9
Box 1, Folder 10
Box 1, Folder 11
Box 1, Folder 12
Box 2, Folder 1
Box 2, Folder 2
Box 2, Folder 3
Box 2, Folder 4
Box 2, Folder 5
Box 2, Folder 6
Box 2, Folder 7
Box 2, Folder 8
Box 2, Folder 9
Box 2, Folder 10

Correspondence, L.B. Schiesz, Vice President of Interstate Public Service Company, 1930–31	Box 2, Folder 11
Correspondence, George E. Gensch, Auditor of Disbursements, 1930–31	Box 2, Folder 12
[Correspondence, Traffic Department, 1930–31]	Box 2, Folder 13
Correspondence, W.L. Snodgrass, General Supt. Traffic, 1930–32	Box 2, Folder 14
Correspondence, E.J. Booth, Assistant to the President, 1930–32	Box 2, Folder 15
Correspondence, Paul Stark, Assistant Supervisor of Accounts, 1930–32	Box 2, Folder 16
Correspondence, H.O. Connell, Auditor Freight Revenue, 1931	Box 2, Folder 17
Correspondence, F.C. Cour, Purchasing Agent, 1931	Box 2, Folder 18
Correspondence, E.H. Utley Jr., General Auditor, 1931	Box 2, Folder 19
Correspondence, H.E. Vordermark, 1931	Box 2, Folder 20
Correspondence, R.H. James, Vice President of Traffic, 1931	Box 3, Folder 1
Interdepartmental correspondence, 1931	Box 3, Folder 2
Correspondence, miscellaneous, 1931	Box 3, Folder 3
Correspondence, re: passenger rates, 1931	Box 3, Folder 4
Correspondence, re: stationary, 1931	Box 3, Folder 5
Correspondence, re: waybills, 1931	Box 3, Folder 6
Correspondence, re: insurance, 1931	Box 3, Folder 7
Correspondence with Central Electric Railway Accountants Association, 1931	Box 3, Folder 8
Correspondence with Illinois Central Railroad Company, 1931	Box 3, Folder 9
Correspondence with Cooke, Sullivan & Ricks, 1931	Box 3, Folder 10
Correspondence, Louis Rappeport, Supervisor of Accounts, 1931–32	Box 3, Folder 11
Correspondence, O.P. Scranton, Supervisor of Agents, 1931–32	Box 3, Folder 12

Correspondence, C.H. Volmerding, Auditor of Revenue, 1931–32	Box 3, Folder 13
Correspondence, miscellaneous, 1931–32	Box 3, Folder 14
Correspondence, re: payroll statistics, 1931–32	Box 4, Folder 1
Correspondence, Robert M. Fuestel, President, 1932	Box 4, Folder 2
Correspondence, re: Public Service Commission Petitions, 1933	Box 4, Folder 3
Indiana Service Corporation, correspondence, 1934	Box 4, Folder 4
Correspondence, re: shares of common stock, 1935	Box 4, Folder 5
Correspondence, re: blank annual reports for the years 1934–36, 1935–36	Box 4, Folder 6
Correspondence, C.J. Jackson, 1935-40	Box 4, Folder 7
Correspondence, re: Utah/Idaho Central Railroad Company's Railway Labor Act case, Oct.–Nov. 1936	Box 4, Folder 8
Correspondence, 1936–40	Box 4, Folder 9
Equipment statements and correspondence, 1937	Box 4, Folder 10
Correspondence, re: Elgin, Joliet & Eastern Railway Co., 1942–67	Box 4, Folder 11
Correspondence, re: railroad crossings, 1947–70	Box 4, Folder 12
Correspondence, W.P. Coliton, 1963	Box 4, Folder 13
Correspondence, W.P. Coliton, re: Monon and C&O lines, 1964–65	Box 4, Folder 14
Correspondence, re: license agreement with town of Beverly Shores, 1964 & 1968	Box 4, Folder 15
Burns Ditch Harbor Waterway correspondence and clippings, 1963–71 (1 of 2)	Box 4, Folder 16
Burns Ditch Harbor Waterway correspondence and clippings, 1963–71 (2 of 2)	Box 4, Folder 17
Correspondence, re: Kensington Interlocking, 1970–76	Box 4, Folder 18
Correspondence, re: Tremont Station building, 1971	Box 4, Folder 19
"Shore Lines Cheat Public—Carter; Flays Wood Cars," <i>Daily Times</i> , 15 Dec. 1936	Box 5, Folder 1

Clippings, re: failure and bankruptcy of South Shore, and legislation to save it, 1962–76	Box 5, Folder 2
"Feasibility of Port Development at Michigan City, Indiana: Graduate School of Business Research Reports," Nov. 1964	Box 5, Folder 3
"End of the line for the South Shore?," <i>Mass Transit</i> , Sept. 1976	Box 5, Folder 4
Clippings, re: fare increases, 1976	Box 5, Folder 5
Clippings, re: fare increases, 1977	Box 5, Folder 6
Clippings, Nov.–Dec. 1977	Box 5, Folder 7
Clippings, Jan.–Apr. 1978	Box 5, Folder 8
Clippings, May–Dec. 1978	Box 5, Folder 9
Clippings, 1979	Box 6, Folder 1
Clippings, 1980	Box 6, Folder 2
Diary of I.D. Carter, Acting Research Engineer, 16 Apr.–31 Dec. 1953	Box 6, Folder 3
Diary of I.D. Carter, Acting Research Engineer, 1954	Box 6, Folder 4
Diary of I.D. Carter, Acting Research Engineer, 14 May 1955–26 Oct. 1956	Box 6, Folder 5
Diary of I.D. Carter, Acting Research Engineer, 17 Jan.–14 June 1956	Box 6, Folder 6
Journals, 1918–23	BV 3513
Indiana Railroad System, miscellaneous forms, 1930	Box 6, Folder 7
Indiana Railroad, Bulletins, 1930–31	Box 6, Folder 8
Indiana Railroad System, correspondence, 1931–32	Box 6, Folder 9
Indiana Railroad, Exceptions, 1934	Box 6, Folder 10
Indiana Railroad, correspondence, 1934–35	Box 7, Folder 1
Application for a Capital Grant from Department of Transportation, Urban Mass Transportation Administration, 1 Nov. 1971	Box 7, Folder 2
Bethlehem Steel, correspondence and clippings, 1963–68	Box 7, Folder 3
General Office Building, East Wing, location of floor outlets, 25 Feb. 1929	OMB 0099 Box 1, Folder 1

Map of South Shore route, map of Northend Porter County, map of Sector D showing additions, and General Plan, 1907–65	OM 0421, FF 20-f
Blueprints of cars, 1927–75	OM 0421, FF 20-f
Map of South Shore route, 16 Aug. 1965	Box 7, Folder 4
Correspondence, E.H. Utley Jr., General Auditor, June–Sept. 1931 (1 of 2)	Box 7, Folder 5
Correspondence, E.H. Utley Jr., General Auditor, Oct.–Dec. 1931 (2 of 2)	Box 7, Folder 6
Correspondence, E.H. Utley Jr., General Auditor, Jan.–Mar. 1932 (1 of 2)	Box 7, Folder 7
Correspondence, E.H. Utley Jr., General Auditor, Apr.–June 1932 (2 of 2)	Box 7, Folder 8
Valuation, Part I, 21 July 1923	Box 8, Folder 1
Valuation, Part II, 21 July 1923	Box 8, Folder 2
Trackage Agreement, ca. 1960s	Box 8, Folder 3
Agreements with Indiana State Highway Commission, re: railroad crossings, 1930	Box 8, Folder 4
Agreements with Indiana State Highway Commission, re: railroad crossings, 1962	Box 8, Folder 5
Agreements with Indiana State Highway Commission, re: railroad crossings, 1966	Box 8, Folder 6
Agreements with Indiana State Highway Commission, re: railroad crossings, 1969	Box 8, Folder 7
Agreements with Indiana State Highway Commission, re: railroad crossings, 1971–74	Box 8, Folder 8
Agreement, re: Indiana toll road, Oct. 1954	Box 8, Folder 9
License agreement with Gary Railways Company, 1933	Box 8, Folder 10
Union Agreements, 1921–62	Box 9, Folder 1
Agreements, 1926–38	Box 9, Folder 2
Correspondence and agreements, re: South Shore and B&O railroads, 1926–67	Box 9, Folder 3
Copy of Agreements, K–Z, 1929–39	Box 9, Folder 4

Leases, 1928–75 (1 of 2)	Box 9, Folder 5
Leases, 1928–75 (2 of 2)	Box 9, Folder 6
Notices, 1925–38	Box 9, Folder 7
Public Service Commission Orders, June 1925–29	Box 10, Folder 1
Public Service Commission Orders, Feb. 1930–Mar. 1938	Box 10, Folder 2
Intercompany proof of claims, 1934–38	Box 10, Folder 3
Indiana Motor Vehicle Laws, 1933	Box 10, Folder 4
Register of Operating Revenues, July 1909–June 1914	BV 3514
Voucher Journal, 1909–14	BV 3515
Voucher Journal, 1 July 1914-31 May 1917	BV 3507
Statements of Revenue and Tonnage, Nov. 1931	OMB 0099, Box 1, Folder 2
Chicago North Shore & Milwaukee Railroad, consolidated classifications, 1929–52	Box 10, Folder 5
Program Work 1984–93, charts (photocopies), July 1989	Box 10, Folder 6
Employee service record cards, Abbott–Barnes, ca. 1937–57	Box 42
Employee service record cards, Barnett–Brady, ca. 1937–57	Box 43
Employee service record cards, Braginton–Cavin, ca. 1937–57	Box 44
Employee service record cards, Ceballos–Czura, ca. 1937–57	Box 45
Employee service record cards, Dabbert–Dziewa, ca. 1937–57	Box 46
Employee service record cards, Eagen–Fowler, ca. 1937–57	Box 47
Employee service record cards, Frageman–Gondora, ca. 1937–57	Box 48
Employee service record cards, Gonsalez– Harrington, ca. 1937–57	Box 49
Employee service record cards, Harris-Hopson, ca.	Box 50

Employee service record cards, Horning–Kaminski, ca. 1937–57	Box 51
Employee service record cards, Kamradt–Kring, ca. 1937–57	Box 52
Employee service record cards, Kristoff–Lobong, ca. 1937–57	Box 53
Employee service record cards, Lochmaier–Manzo, ca. 1937–57	Box 54
Employee service record cards, Maples–Miller, Harold, ca. 1937–57	Box 55
Employee service record cards, Miller, James– Nowicki, ca. 1937–57	Box 56
Employee service record cards, Nueva–Perez, ca. 1937–57	Box 57
Employee service record cards, Perham–Rapp, ca. 1937–57	Box 58
Employee service record cards, Rappeli–Ruffus, ca. 1937–57	Box 59
Employee service record cards, Ruggles–Schroeder, ca. 1937–57	Box 60
Employee service record cards, Schroll–Sobecki, ca. 1937–57	Box 61
Employee service record cards, Sobieralski–Szynalik, ca. 1937–57	Box 62
Employee service record cards, Taber–Vedron, ca. 1937–57	Box 63
Employee service record cards, Vega–Wiesner, ca. 1937–57	Box 64
Employee service record cards, Wigley–Zuzulich, ca. 1937–57	Box 65
South Bend Taxes, Receipts, 1907	Box 10, Folder 7
Citizen Bank deposit slips, 1908	Box 10, Folder 8
South Bend Construction Company, invoices, 1908–10	Box 10, Folder 9
South Bend Construction Company, contracts, 1906	Box 10, Folder 10

South Bend Construction Company, contracts, Jan.–Mar. 1907	Box 10, Folder 11
South Bend Construction Company, contracts, Apr.— May 1907	Box 11, Folder 1
South Bend Construction Company, contracts, June 1907	Box 11, Folder 2
South Bend Construction Company, contracts, July 1907	Box 11, Folder 3
South Bend Construction Company, contracts, Aug. 1907	Box 11, Folder 4
South Bend Construction Company, contracts, Sept. 1907	Box 11, Folder 5
South Bend Construction Company, contracts, Oct. 1907	Box 11, Folder 6
South Bend Construction Company, contracts, Nov. 1907	Box 11, Folder 7
South Bend Construction Company, contracts, Dec. 1907	Box 11, Folder 8
South Bend Construction Company, contracts, Jan.–Feb. 1908	Box 11, Folder 9
South Bend Construction Company, contracts, Mar.–Apr. 1908	Box 11, Folder 10
South Bend Construction Company, contracts, May–June 1908	Box 11, Folder 11
South Bend Construction Company, contracts, July–Aug. 1908	Box 11, Folder 12
South Bend Construction Company, contracts, Sept.—Dec. 1908	Box 11, Folder 13
Contracts, 1909	Box 11, Folder 14
Contracts, 1910	Box 11, Folder 15
Contracts, 1911–19	Box 12, Folder 1
Gary Heat, Light, & Water Company, contracts re: right to cross railroad right-of-way with gas mains, 1925	Box 12, Folder 2
Price Data, Power and K&E contracts, 1925	Box 12, Folder 3
Contract between Illinois Central Railroad and South Shore, Chicago Terminal, 4 Jan. 1933	Box 12, Folder 4

Local Passenger Tariffs, 1913–23, 1963	Box 12, Folder 5
Local Passenger Tariffs, commutation, corpse, mileage ticket, and party fares, 1913–19	Box 12, Folder 6
Local Passenger Tariffs, commutation fares, 1919–25	Box 12, Folder 7
Local Passenger Tariffs, round trip excursion fares, 1921–26	Box 12, Folder 8
Local Passenger Tariffs, Aug. 1922–Dec. 1923	Box 12, Folder 9
Local Passenger Tariffs, Nos. 960-J, 1393-F, 1444-D, 23 June 1960	Box 12, Folder 10
Local Passenger Tariff No. 1393-F (photocopy), 23 June 1960	Box 12, Folder 11
Local Passenger Tariff No. 140-O, fares for one- way, round trip, multiple ride bearer, and commutation tickets, 28 Aug. 1970	Box 12, Folder 12
Joint Passenger Tariff No. 10, rate for interchangeable 1,000 mile ticket, 1912	Box 12, Folder 13
Joint Passenger Tariffs, one way and round trip fares, 1912–17	Box 12, Folder 14
Joint Tariff No. 2, 25-ride bearer commutation fare between Chicago & Hammond, IN, 1916–21	Box 12, Folder 15
Illinois Central Railroad Company, Joint Passenger Tariffs, one way, round trip, and 25-ride commutation fares, 1917–21	Box 12, Folder 16
Joint Passenger Tariffs, one day fares, 1922-23	Box 12, Folder 17
Miscellaneous Passenger Tariffs, 1912–35, 1964-66, 1983	Box 13, Folder 1
Round-Trip Summer Excursion Fares, 1920–22	Box 13, Folder 2
Passenger Revenue, Aug. 1929–Mar. 1932	OMB 0099, Box 2, Folder 1
Details for passenger and freight allocation, 1974	Box 13, Folder 3
Local Freight Tariff, Naming rates on milk and cream, 1910	Box 13, Folder 4
Joint & Local Baggage Tariff No. 6, CETA, 1913-20	Box 13, Folder 5
Baggage Tariff, Local & Joint Tariff of Baggage and Corpse Rules, rates and charges, 1919–22	Box 13, Folder 6

Arbitration Board No. 259, National Medication Board Case No. A-6147, Wage and Earnings Comparisons, n.d.	Box 13, Folder 7
Circulars on war tax, 1918–21	Box 13, Folder 8
A Study of the Freights Revenues Expenses and Earnings of the Chicago South Shore & South Bend Railroad, 1929–38	Box 13, Folder 9
Vice President and General Manager's Reports, 1929–38	Box 13, Folder 10
Number of revenue passengers carried on certain trains operated between Gary and Chicago, Nov. 1930 and 28 Jan.–3 Feb. 1931	Box 13, Folder 11
Examination and Survey of Waterways Connecting from Chicago to the Mississippi River, Before the Special Board of Engineers, War Department, 19 Oct. 1931	Box 13, Folder 12
Pass Requests, 1931	Box 13, Folder 13
Statements, miscellaneous, 1931	Box 13, Folder 14
Ticket Revenue Statistics, 1932	Box 14, Folder 1
Reorganization Proceedings, 1935	Box 14, Folder 2
Passengers on Terminal [reports], 1942–59	Box 14, Folder 3
Cars Hauled and Freight Crew Hours [reports], 1942–61	Box 14, Folder 4
Crews and Hours—Freight Operation [reports], 1942–61	Box 14, Folder 5
Outgoing Freight Ledger, May 1926-Feb. 1927	BV 3508
Outgoing Freight Ledger, MarJuly 1927	BV 3509
Organizational charts, 1944	Box 14, Folder 6
Program for Visitation Day for Michigan City School Teachers, 26 Apr. 1949	Box 14, Folder 7
Class I Motor Carriers, Annual Report, to Michigan Public Service Comm., 1950–58	Box 14, Folder 8
Train Dispatchers, Conductors and Enginemen Operating Rules, 1 Jan. 1953	Box 14, Folder 9
Justification of East Chicago By-Pass Along Indiana Tollroad, 1953	Box 14, Folder 10

Chicago Commuter Railroad Fare Increases, 1960–70	Box 14, Folder 11
Proposed Train Discontinuance, Mar. 1961	Box 14, Folder 12
History of Rate Changes, 14 Apr. 1961	Box 14, Folder 13
Other than Class I Motor Carriers of Passenger, Report, 1961	Box 14, Folder 14
Train Delays [reports], 1961–62	Box 15, Folder 1
Study of Passenger Service, Apr. 1963	Box 15, Folder 2
Study of estimated savings from Coordination of the Finance and Accounting Departments of the B&O/C&O/WM and South Shore, first draft, 29 Apr. 1965	Box 15, Folder 3
Mechanical Study, 10 May 1965	Box 15, Folder 4
Report on Freight Traffic, 19 May 1965	Box 15, Folder 5
Engineering Department Study, 28 June 1965	Box 15, Folder 6
Letter of Jurisfication [report], 20 Nov. 1967	Box 15, Folder 7
Passenger Study, Aug. 1968	Box 15, Folder 8
Report on Survey of Electrical Power System for New Passenger Cars, 28 Oct. 1969	Box 15, Folder 9
Statement of Situation, Passenger Service, July 1970	Box 15, Folder 10
Monthly Reports, 1972	Box 15, Folder 11
About the South Shore Line, report, Apr. 1974	Box 15, Folder 12
Railroad maps and railroad right-of-way information, n.d.	OMB 0099, Box 2, Folder 2
Structural Evaluation of Commuter Equipment, Supplemental Report, May 1978	Box 15, Folder 13
Design Criteria Report Pertaining to Proposed Work on the Chicago South Shore & South Bend's Passenger Rail System, Aug. 1979 (1 of 2)	Box 16, Folder 1
Design Criteria Report Pertaining to Proposed Work on the Chicago South Shore & South Bend's Passenger Rail System, Aug. 1979 (2 of 2)	Box 16, Folder 2
Economic Adjustment Study: Chicago South Shore & South Bend Corridor, Appendices, Mar. 1980	Box 16, Folder 3
Electric Multiple Unit Railway Cars for Commuter	Box 16, Folder 4

Technical Proposal, Oct. 1980	
Commuter Services Standard Book, Agenda for Capital Investments to Enhance the Commuter Passenger Service, 1986–1989, 27 Nov. 1985	Box 16, Folder 5
Track Charts (photocopies), Aug. 1986	Box 16, Folder 6
Commuter Rail Study for the Indiana Commuter Railroad Transportation Study Commission, Dec. 1986	Box 16, Folder 7
Chicago South Shore & South Bend Railroad Perspectives on the Transit Crisis in Northern Indiana, 1987	Box 16, Folder 8
Commuter Service Contracts, June 1988	Box 17, Folder 1
Accident Register, 24 Sept. 1911–5 Aug. 1913	BV 3510
Accident Reports, Aug. 1913-July 1915	Box 39, Folder 2
Accident Reports, Aug. 1915-July 1917	Box 39, Folder 3
Accident Reports, FebAug. 1918	Box 40, Folder 1
Accident Reports, Aug. 1918–June 1921	Box 40, Folder 2
Accident Reports, July 1921-Dec. 1923	Box 40, Folder 3
Accident Reports, JanSept. 1924	Box 40, Folder 4
Accident Reports, Oct. 1924-Nov. 1925	Box 41, Folder 1
Articles, notes, and correspondence, 1947-69	Box 41, Folder 2
Articles, notes, and correspondence, 1970-89	Box 41, Folder 3
Correspondence and notes, 1983	Box 75, Folder 1
Clippings, re: history and rehabilitation of South Shore, 1909–31	Box 75, Folder 2
Clippings, 1949–79	Box 75, Folder 3
Clippings, 1980–99	Box 75, Folder 4
Timetables, 1926–77	Box 75, Folder 5
Timetables and tickets, 1982–97	Box 75, Folder 6

Service on the Chicago South Shore & South Bend Railroad Contract No. IN-03-0033, Volume I,

## **Series 2: Board Meetings**

CONTENTS	CONTAINER
Board of Directors and Annual Meeting of Stockholders, Supporting papers, Volume I, 1974–77 (1 of 2)	Box 17, Folder 2
Board of Directors and Annual Meeting of Stockholders, Supporting papers, Volume I, 1974–77 (2 of 2)	Box 17, Folder 3
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume II, 1977–79 (1 of 2)	Box 17, Folder 4
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume II, 1977–79 (2 of 2)	Box 17, Folder 5
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume III, 1980–82 (1 of 2)	Box 18, Folder 1
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume III, 1980–82 (2 of 2)	Box 18, Folder 2
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume IV, 1982–84 (1 of 2)	Box 18, Folder 3
Board of Directors, Stockholders & Directors action without meeting, Supporting papers, Volume IV, 1982–84 (2 of 2)	Box 18, Folder 4
Board of Directors, Stockholders & Directors action meetings, Supporting papers, July–Sept. 1984	Box 19, Folder 1
Minutes of a special meeting of Board of Directors, Jan.–Dec. 1939	Box 19, Folder 2
Shareholders Annual Meetings, Minutes, 1961–74	Box 19, Folder 3
Minute Book, Minutes of Board of Directors, 1929–32	Box 19, Folder 4
Proceedings of Annual Shareholders Meetings, 1961 & 1965	Box 19, Folder 5
Proceedings of Annual Shareholders Meetings, 1972–73	Box 19, Folder 6
Series 3: Financial Papers	
CONTENTS	CONTAINER

Box 75, Folder 7

Annual Reports, 1940-57

Annual Reports, 1960–69	Box 75, Folder 8
Annual Reports, 1973–82	Box 75, Folder 9
Annual Reports to the Interstate Commerce Commission, 1925–26	Box 19, Folder 7
Annual Reports to the Interstate Commerce Commission, 1927–29	Box 19, Folder 8
Annual Reports to the Interstate Commerce Commission, 1923–24	Box 20, Folder 1
Annual Reports to the Interstate Commerce Commission, 1930–32	Box 20, Folder 2
Annual Reports to the Interstate Commerce Commission, 1933–35	Box 20, Folder 3
Annual Reports to the Interstate Commerce Commission, 1936–38	Box 20, Folder 4
Annual Reports to the Interstate Commerce Commission, 1939–40	Box 20, Folder 5
Annual Reports to the Interstate Commerce Commission, 1941–42	Box 21, Folder 1
Annual Reports to the Interstate Commerce Commission, 1943–45	Box 21, Folder 2
Annual Reports to the Interstate Commerce Commission, 1946–48	Box 21, Folder 3
Annual Reports to the Interstate Commerce Commission, 1949–51	Box 21, Folder 4
Annual Reports to the Interstate Commerce Commission, 1952–54	Box 21, Folder 5
Annual Reports to the Interstate Commerce Commission, 1955–57	Box 21, Folder 6
Annual Reports to the Interstate Commerce Commission, 1958–59	Box 22, Folder 1
Annual Reports to the Interstate Commerce Commission, 1960–62	Box 22, Folder 2
Annual Reports to the Interstate Commerce Commission, 1963–65	Box 22, Folder 3
Annual Reports to the Interstate Commerce Commission, 1966–69	Box 22, Folder 4

Annual Reports to the Interstate Commerce Commission, 1970–72 & 1974	Box 22, Folder 5
Annual Report, 1983	Box 22, Folder 6
Passenger Annual Report, to the Interstate Commerce Commission, 1945–47	Box 22, Folder 7
Passenger Annual Report, to the Interstate Commerce Commission, 1949–51	Box 23, Folder 1
Passenger Annual Report, to the Interstate Commerce Commission, 1952–54	Box 23, Folder 2
Passenger Annual Report, to the Interstate Commerce Commission, 1955–56	Box 23, Folder 3
Annual Reports to the Public Service Commission of Indiana, 1925–26	Box 23, Folder 4
Annual Reports to the Public Service Commission of Indiana, 1927–29	Box 23, Folder 5
Annual Reports to the Public Service Commission of Indiana, 1931–33	Box 24, Folder 1
Annual Reports to the Public Service Commission of Indiana, 1934–36	Box 24, Folder 2
Annual Reports to the Public Service Commission of Indiana, 1937–39	Box 24, Folder 3
Annual Reports to the Public Service Commission of Indiana, 1940–42	Box 24, Folder 4
Annual Reports to the Public Service Commission of Indiana, 1943–45	Box 24, Folder 5
Annual Report to the Public Service Commission of Indiana, 1950	Box 24, Folder 6
Annual Report to the Illinois Commerce Commission, 1923–25	Box 25, Folder 1
Annual Report to the Illinois Commerce Commission, 1926–28	Box 25, Folder 2
Annual Report to the Illinois Commerce Commission, 1929–31	Box 25, Folder 3
Annual Report to the Illinois Commerce Commission, 1932–35	Box 25, Folder 4
Annual Report to the Illinois Commerce Commission, 1936–39	Box 25, Folder 5

Annual Report to the Illinois Commerce Commission, 1940–42	Box 26, Folder 1
Annual Report to the Illinois Commerce Commission, 1943–45, 1967	Box 26, Folder 2
Authority for Expenditure (photocopies), 1963-69	Box 26, Folder 3
Authority for Expenditure (photocopies), 1970–72 (1 of 2)	Box 26, Folder 4
Authority for Expenditure (photocopies), 1970–72 (2 of 2)	Box 26, Folder 5
Authority for Expenditure (photocopies), 1973–77 (1 of 2)	Box 26, Folder 6
Authority for Expenditure (photocopies), 1973–77 (2 of 2)	Box 26, Folder 7
Financial and Operating Reports, 1922	Box 27, Folder 1
Financial and Operating Reports, 1923	Box 27, Folder 2
Financial and Operating Reports, 1926	Box 27, Folder 3
Operating Reports, 1927	Box 27, Folder 4
Operating Control Budget Record, 1929–36 (1 of 5)	Box 28, Folder 1
Operating Control Budget Record, 1929–36 (2 of 5)	Box 28, Folder 2
Operating Control Budget Record, 1929–36 (3 of 5)	Box 28, Folder 3
Operating Control Budget Record, 1929–36 (4 of 5)	Box 28, Folder 4
Operating Control Budget Record, 1929–36 (5 of 5)	Box 29, Folder 1
Mortgage, to Illinois Merchants Trust Company, 15 July 1925	Box 29, Folder 2
Adjustment Mortgage, to the Cleveland Trust Company, 15 July 1925	Box 29, Folder 3
Second Mortgage, to Cleveland Trust Company, 15 July 1925	Box 29, Folder 4
Mortgage, to the First National Bank of Chicago, 1 Jan. 1938	Box 29, Folder 5
Accounts paid record cards, A-Carp, ca. 1909-20	Box 66
Accounts paid record cards, Carr-Dav, ca. 1909-20	Box 67
Accounts paid record cards, Day-Good, ca. 1909-20	Box 68

Accounts paid record cards, Gor–Indiana, ca. 1909–20	Box 69
Accounts paid record cards, Indianapolis–Mari, ca. 1909–24	Box 70
Accounts paid record cards, Mars-N, ca. 1909-24	Box 71
Accounts paid record cards, O-R, ca. 1909-24	Box 72
Accounts paid record cards, S, ca. 1909-24	Box 73
Accounts paid record cards, T-Z, ca. 1909-24	Box 74
Auditor's Report, 1938–43	Box 29, Folder 6
Financial Statements, 1938–45	Box 29, Folder 7
Financial Statements with Auditor's Certificate, 1946–51, 53–55	Box 29, Folder 8
Comparative Statement of Earnings, 1924–25	Box 30, Folder 1
Certified Balance Sheet, 1929–31	Box 30, Folder 2
Balance Sheet and Statement of Income Surplus, 1934–37	Box 30, Folder 3
Statement of Sinking Fund Deposit, 1939–41	Box 30, Folder 4
Audit Reports, 1926–31	Box 30, Folder 5
Michigan City Terminal, Inc., Audit Reports, 1927–31	Box 30, Folder 6
Coordinated Transport, Inc., Audit Reports, 6 Oct.–31 Dec. 1931	Box 30, Folder 7
South Bend Masonic Temple Association, Audit Report, 1927	Box 30, Folder 8
Inter-Company accounts receivable and accounts payable, 1931	Box 30, Folder 9
Land, purchases and sales, 1972	Box 30, Folder 10
Dead Heading Insurance, policy no. SR961, Reliance Insurance Company, 1971–76	Box 30, Folder 11
Investments, 1977	Box 30, Folder 12
Income statements, Bidding table, and Amtrak information, 1973–74	Box 30, Folder 13
Necessity certificate, application data, 1953	Box 30, Folder 14

Cost of Reproduction and Cost of Reproduction Less Accrued Depreciation, 1 May 1926	Box 31, Folder 1
Finance Docket, Statement Regarding Proposed Discontinuance or Changes of Train Service, 17 Mar. 1987	Box 31, Folder 2
Certificate of Increase of Capital Stock, by the Secretary of State of Indiana, 17 Nov. 1928	Box 31, Folder 3
Common stock circular, 17 July 1953	Box 31, Folder 4
Cancelled stock certificates, 1962–79	Box 31, Folder 5
Foreclosure of Mortgage, correspondence, 1925	Box 31, Folder 6
Foreclosure of Mortgage, pleadings, 1925 (1 of 2)	Box 31, Folder 7
Foreclosure of Mortgage, pleadings, 1925 (2 of 2)	Box 32, Folder 1
South Shore Railroad Bonds, 1909–10	OMB 0099, Box 3, Folder 1
Revenue, Expenses, & Net Income, 1924–59	OMB 0099, Box 3, Folder 2
Calumet Gas & Electric Company, Balance Sheets, Dec. 1932	OMB 0099, Box 3, Folder 3

# **Series 4: Interstate Commerce Commission Filings**

CONTENTS	CONTAINER
Agreement between South Shore, Gary Railways Company, and Gary Heat, Light & Water Company, 1926	Box 32, Folder 2
Appendix No. 30 to Affidavits and Abstracts of Titles, 1926	Box 32, Folder 3
Petition for Authority to Issue Certain Securities and to Amend its Articles of Association, 1923	Box 32, Folder 4
Ballot and Stockholders' list, re: amendment of charter, 1929	Box 32, Folder 5
Miscellaneous items, re: amendment of charter, 1929	Box 32, Folder 6
Petition to Indiana Public Service Commission, re: amendment of charter, 1929	Box 32, Folder 7
Certificate of Amendment of Charter, 1929	Box 32, Folder 8
Affidavit and Notice, re: amendment of charter, 1929	Box 32, Folder 9

Petition and Resolutions, re: sale to Indiana Industrial Land Company for super-power right of way, 1929	Box 32, Folder 10
Correspondence, re: sale to Indiana Industrial Land Company for super-power right of way, 1925–26	Box 32, Folder 11
Interstate Commerce Commission, Annual Reports re: Interurban Electric Railways, 1928, 1935, 1937	Box 32, Folder 12
Certificate that South Shore has custody and control of the corporate seal and corporate records, Jan. 1931	Box 32, Folder 13
Court papers re: filing for bankruptcy, Sept. 1933	Box 32, Folder 14
Disaffirming the lease of the passenger station at South Bend, [court papers], 24 Jan. 1934	Box 32, Folder 15
Correspondence, re: status under Railway Labor Act, 1935	Box 32, Folder 16
Exhibits, re: status under Railway Labor Act, 1935	Box 32, Folder 17
Memoranda, re: status under Railway Labor Act, 1935	Box 33, Folder 1
Briefs, re: status under Railway Labor Act, 1935	Box 33, Folder 2
Pleadings, re: status under Railway Labor Act, 1935	Box 33, Folder 3
Financial Docket No. 12253, Mortgage, 22 Sept. 1937	Box 33, Folder 4
John N. Shannahan and Claude J. Jackson, Trustees, working papers, 1935–36	Box 33, Folder 5
John N. Shannahan and Claude J. Jackson, Trustees, correspondence, 1936–38	Box 33, Folder 6
John N. Shannahan and Claude J. Jackson, Trustees vs. U.S., court case exhibits, May 1937	Box 33, Folder 7
John N. Shannahan and Claude J. Jackson, Trustees vs. U.S., transcripts of evidence, 1937	Box 33, Folder 8
Interstate Commerce Commission Electric Railway Docket No. 7, re: status, 25 Nov. 1938	Box 33, Folder 9
Official Report of Proceedings before the Securities and Exchange Commission, In the Matter of Midland Utilities Company, 23 Aug. 1938	Box 33, Folder 10
Report of Clarence A. Southerland and Jay Samuel Hartt, 1 July 1938–31 Dec. 1939	Box 34, Folder 1

Report of Clarence A. Southerland and Jay Samuel Hartt, 1940	Box 34, Folder 2
Report of Clarence A. Southerland and Jay Samuel Hartt, 1941	Box 34, Folder 3
Application for Authority to Issue Securities under Section 20a of the Interstate Commerce Act, 1942	Box 34, Folder 4
Interstate Commerce Commission Financial Docket, Application for Authority to Issue Securities under Section 20a of the Interstate Commerce Act, 1942	Box 34, Folder 5
Interstate Commerce Commission, Docket No. 28974, Index to Exhibit I, 1944	Box 34, Folder 6
Interstate Commerce Commission, Docket No. 46976, Exhibits, 1946–61	Box 34, Folder 7
Interstate Commerce Commission, Docket No. 35618, Index to Exhibit I, 1947	Box 34, Folder 8
Interstate Commerce Commission, Docket No. 29711, Index to Exhibit I, 1947	Box 34, Folder 9
Interstate Commerce Commission, Docket No. 29949, Testimony of J.H. Parmelee in Eastern Passenger Fare Case, 5 May 1948	OMB 0099, Box 3, Folder 4
Interstate Commerce Commission, Docket No. 30833, Illinois Intrastate Commutation Fares, 1950	Box 34, Folder 10
Interstate Commerce Commission, Docket No. 30833, papers re: Illinois Intrastate Commutation Fares, 1947	Box 35, Folder 1
Interstate Commerce Commission, Finance Docket No. 18272, re: South Shore railroad abandonment, 29 Sept. 1953	Box 35, Folder 2
Amendment to Certificate, Progress Report, 1953	Box 35, Folder 3
Correspondence and papers re: temporary permit for double detour track in Hammond, Indiana, 1953–55	Box 35, Folder 4
List of South Shore Exhibits, Interstate Commerce Commission I. & S. Docket No. 6131 and Illinois Commerce Commission Docket No. 41124, 1953	Box 35, Folder 5
Finance Docket No. 18272, Application for a certificate of Public Convenience and Necessity, 11 Sept. 1953	Box 35, Folder 6
Correspondence and applications, re: Finance Docket No. 18272, 1953	Box 35, Folder 7

Resolutions and reports, re: Finance Docket No. 18272, 1953	Box 35, Folder 8
Resolutions, re: City of Hammond permits, 1955	Box 35, Folder 9
Resolution R-55, Ratification and Approval of Permit, 19 July 1955	Box 35, Folder 10
Correspondence with Harbison-Walker Refractories Company, 1955–57	Box 35, Folder 11
Exhibits for the Interstate Commerce Commission Hearing, I. & S. Docket No. 6803 and Illinois Commerce Commission Docket No. 44389, 1957	Box 35, Folder 12
Interstate Commerce Commission Docket No. 6803 and Illinois Commerce Commission Docket No. 44389, Testimony of Edward H. Bross, 1957	Box 35, Folder 13
Testimony of R.E. Jamieson [for court case concerning proposed increases in commuter fares], 1957	Box 35, Folder 14
Testimony of Jay Samuel Hartt [for court case concerning proposed increases in commuter fares], 1957	Box 35, Folder 15
Finance Docket No. 20026, Testimonies and exhibits, 1957	Box 35, Folder 16
Exhibits for Illinois Commerce Commission Docket No. 45626 and Public Service Commission of Indiana Docket No. 28061, 1958	Box 36, Folder 1
Arbitration Case, Brotherhood of Railroad Trainmen, Case A-6147, 1960 (1 of 2)	Box 36, Folder 2
Arbitration Case, Brotherhood of Railroad Trainmen, Case A-6147, 1960 (1 of 2)	Box 36, Folder 3
E. H. Bross, Statement in respect to proposed discontinuance and change of certain passenger trains, 1961 (1 of 2)	Box 36, Folder 4
E. H. Bross, Statement in respect to proposed discontinuance and change of certain passenger trains, 1961 (2 of 2)	Box 36, Folder 5
Interstate Commerce Commission, Finance Docket No. 22757, Proposed discontinuance and change of certain passenger trains, Schedules, Volume II, 1963	Box 37, Folder 1
Interstate Commerce Commission, Finance Docket No. 23566, Exhibits, 1955–63	OMB 0099, Box 3, Folder 5

Interstate Commerce Commission, Finance Docket No. 23566, re: Chesapeake and Ohio Railways' control of South Shore, 1966	Box 37, Folder 2
Interstate Commerce Commission, Finance Docket No. 23612, Protest and request hearing, 24 May 1965	Box 37, Folder 3
Interstate Commerce Commission, Finance Docket No. 23645, Petition for leave to intervene in opposition to application, 24 May 1965	Box 37, Folder 4
Interstate Commerce Commission, Finance Docket No. 23587, re: investigation control of South Shore, 1965	Box 37, Folder 5
Brief and Requested findings and Conclusion, Docket Nos. 23566 & 23587, 18 Apr. 1966	Box 37, Folder 6
Letter of Justification, re: proposals, 1968	Box 37, Folder 7
Interstate Commerce Commission, Finance Docket No. 25865, Proposed discontinuance and change of certain passenger trains, Volume I, Sept. 1969	Box 37, Folder 8
Interstate Commerce Commission, Finance Docket No. 25865, Proposed discontinuance and change of certain passenger trains, 19 Jan. 1970	Box 37, Folder 9
Interstate Commerce Commission, Finance Docket No. 25865, Proposed discontinuance and change of certain passenger trains, Volume II, 1968	Box 38, Folder 1
Cause No. 32474, petition for approval of new, restructured schedule of rates and charges for passenger service and request for emergency relief, Appendix, 1971	Box 38, Folder 2
Interstate Commerce Commission, petition for authority to discontinue all passenger service, Dec. 1976	Box 75, Folder 10
Finance Docket, Environmental and Energy Report Regarding Discontinuance or Changes of Train Service, 17 Mar. 1987	Box 38, Folder 3
Venango River Corporation, Loans from Citicorp Industrial Credit, Inc. and Heller Financial Inc., 24 Apr. 1987 (1 of 2)	Box 38, Folder 4
Venango River Corporation, Loans from Citicorp Industrial Credit, Inc. and Heller Financial Inc., 24 Apr. 1987 (2 of 2)	Box 38, Folder 5
Venango River Corporation, Merger of Venango Acquisition Corporation into South Shore, Volume I,	BV 3511

Venango River Corporation, Merger of Venango Acquisition Corporation into South Shore, Volume II, 28 Sept. 1984	BV 3512
Interstate Commerce Commission, 1988 (1 of 2)	Box 38, Folder 6
Interstate Commerce Commission, 1988 (2 of 2)	Box 39, Folder 1

Series 5: Posters, 1925	
CONTENTS	CONTAINER
The Dunes Beach by the South Shore Line, Urgelles, [sunbather on the beach under an umbrella] 1925	Visual Collections: Oversize Graphics, Folder 1, FF 21-j
Football: Notre Dame (South Bend) by South Shore Line, Oscar Rabe Hanson, [football players] 1925	Visual Collections: Oversize Graphics, Folder 2, FF 21-j
Dunes Woodland, Oscar Rabe Hanson, [pond in the woods] 1925	Visual Collections: Oversize Graphics, Folder 3, FF 21-j
Winter in the Dunes South Shore Line, Oscar Rabe Hanson, [trees without leaves on the dunes] 1925	Visual Collections: Oversize Graphics, Folder 4, FF 21-j
Homeward Bound, Oscar Rabe Hanson, [geese flying in front of an orange sun] 1925	Visual Collections: Oversize Graphics, Folder 5, FF 21-j
[Beach scene] Oscar Rabe Hanson, 1925	Visual Collections: Oversize Graphics, Folder 6, FF 21-j
Steel Mills at Gary by South Shore Line, Norman Erickson, [steel mill silhouettes in front of a sunset] 1925	Visual Collections: Oversize Graphics, Folder 7, FF 21-j

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