

Annual Report

Fiscal Year 2018 (April 1, 2017-March 31, 2018)



Welcome

As a preservation and cultural heritage organization, our properties and collections reflect the past. To advance our mission and accomplish our goals, however, Historic New England strives to be a forward-looking leader among museums around the world. With all of your help, we think we achieved that objective in Fiscal Year 2018.

We entered the period with a generous and devoted base of members, volunteers, and donors who helped us make robust strides throughout the year. Our volunteers dedicated a total of 10,179 hours to Historic New England's operations. Strong endowment growth reflected outstanding commitment by donors. Attendance at our museum properties achieved a record high with 214,650 visitors, representing 3 percent growth from the previous year. Membership registered a record increase to 8,715 households, up 5 percent; we gained 2,078 new memberships, exceeding the previous year's count by 464.

Our Eustis Estate Museum and Study Center in Milton, Massachusetts, was a big contributor to these successes.

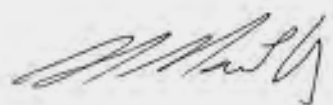
Opened to the public in May 2017, the Eustis Estate is a major achievement for Historic New England, affording us an opportunity to present a twenty-first-century model for engaging visitors with historic houses. Creative use of technology provides user-selected access to deep information about the site. The setting encourages people to feel at home in the museum. We curated popular exhibitions in the Eustis Estate galleries, some drawn from Historic New England's collections—such as the *Mementos* jewelry exhibition—and some arranged through partnerships with other organizations.

We cannot rely on our properties and collections alone to reach a broad public. Partnering with community organizations is an important part of our activities. Among the fruits of such efforts are two projects in our *Everyone's History* series—the photographic and oral history exhibition *We Are Haverhill: Changing Faces of Haverhill's Neighborhoods*, about the Massachusetts city; and our latest documentary film, *Rooted: Cultivating Community in the Vermont Grange*.

Historic New England also launched *Engaging Students of Color through Internships*. This program attracts people of color to work at the organization to better reflect the diverse communities we serve and to help make us a more inclusive institution.

Attaining reaccreditation from the American Alliance of Museums reaffirmed what a highly relevant institution Historic New England continues to be. Accreditation, considered the gold standard of museum excellence, recognizes commitment to excellence and continuous institutional improvement. Historic New England first achieved accreditation in 1976.

We continue to strive to work with all of you to implement a forward-looking mission and vision to serve and benefit the diverse New England public. Thank you for helping with our efforts!



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Ms. Janet Green
Annabella Gualdoni and Vito Cavallo
Mr. Jeffery M. Hall
Mr. Philip A. Hayden
Katherine K. Holt and Hamilton Holt
Mr. Henry B. Hoover, Jr.
Mr. Ralph Johnston
Mr. Christopher Keppelman
Mrs. Mary S. Kingsbery
Catherine Coolidge Lastavica
Ms. Ginny Leslie
Mr. John Matzke
Mr. Paul F. McDonough, Jr. and
Ms. Carla A. Blakley
Warren and Karen McFarlan

William L. McQueen and
Carla O. A. Bosch
Mr. Alan Murray
Ms. Beverly P. Mutrie
Mr. John A. Neale and
Dr. Stephen L. Boswell
Mr. Carl R. Nold
Mr. and Mrs. Richard C. Nylander
Nancy Osgood
Mr. Stephen P. Parson
Mr. and Mrs. Anthony D. Pell
Mr. Brian R. Pfeiffer
Deborah S. Reed
Robert B. Rettig
Mr. James V. Righter
Mr. David N. Rooney
Mr. and Mrs. Roger T. Servison
Mr. Earle G. Shettleworth, Jr.
Mr. Alan P. Slack
Susan P. Sloan
Mr. Richard Sommers

Mrs. Frederick A. Stahl
Dennis E. Stark and
Robert F. Amarantes
Mr. J. Reed Stewart
Thomas A. Stone and Valerie M. Warrior
Ms. Denise C. Sullivan
Ms. Bette Task
E. Clothier Tepper
Bryant F. Tolles, Jr.
Nancy Briggs Tooke
Mr. George E. Triantaris and
Mr. Steve Nigzus
Joseph H. Twichell†
Mr. Kemble Widmer II and
Ms. Elisabeth Garrett Widmer
Mr. Roger D. Willmott
Ms. Susan F. Witzell

† Deceased



Financials

Operating Financial Statement ^a April 1, 2017 - March 31, 2018

REVENUE	FY2018	FY2017	% increase (decrease)	% of total
Investment Return Designated for Operations ^b	\$ 6,138,000	\$ 6,049,000	1%	33%
Revenue from Operations	2,437,000	2,359,000	3%	13%
Contributed Income	3,735,000	3,000,000	25%	20%
Contributed Income for Property & Long-term Investments	6,176,000	4,662,000	32%	34%
TOTAL REVENUE	\$ 18,486,000	\$ 16,070,000	15%	100%

EXPENSES	FY2018	FY2017	% increase (decrease)	% of total
Museum Operations	\$ 4,182,000	\$ 4,016,000	4%	33%
Preservation Maintenance ^c	2,202,000	4,531,000	(51%)	18%
Collections & Exhibitions	1,607,000	1,982,000	(19%)	13%
Education & Public Programming	1,337,000	1,366,000	(2%)	11%
Administration	1,118,000	1,168,000	(4%)	9%
Fundraising	910,000	594,000	53%	7%
Revenue Generating Projects	497,000	543,000	(8%)	4%
Preservation Easement Program	345,000	289,000	19%	3%
Marketing	240,000	247,000	(3%)	2%
TOTAL EXPENSES	\$ 12,438,000	\$ 14,736,000	(16%)	100%

Net Income from Operations ^d	\$ 6,048,000	\$ 1,334,000
Endowment Assets ^e	\$ 134,251,000	\$ 115,536,000
Gain on Investments	\$ 14,932,000	\$ 11,837,000

a This financial statement represents the general operating activities for Historic New England only. Other non-operating activity, including realized and unrealized gains on restricted assets, can be found within the audited financial statements.

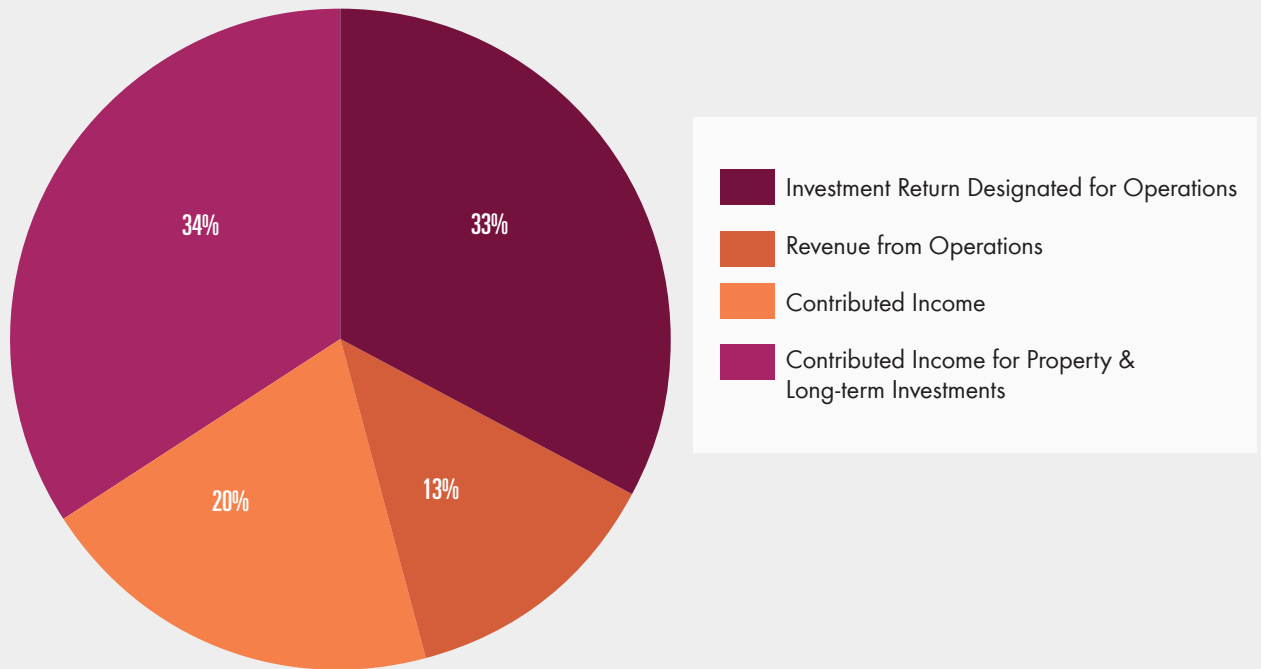
b "Investment Return Designated for Operations" represents endowment funds approved by the Board of Trustees to support annual operations and income from trusts. The annual draw is based on appropriating 5% (the board may approve more or less from time to time) of the preceding twenty-quarter fair market value of the investments as of December 31.

c The higher FY2017 "Preservation Maintenance" line reflects the completion of the renovation of the Eustis Estate Museum and Study Center.

d "Net Income from Operations" above includes contributions for property acquisitions and long-term investments of \$6 million in FY2018 and \$5 million in FY2017.

e "Endowment Assets" excludes beneficial interest in perpetual trusts which equaled \$10.1 million for FY2018 and \$9.7 million for FY2017.

REVENUE



EXPENSES

