

ANNUAL REPORT

FY 2018



**HERITAGE
SQUARE**

AT HERITAGE AND SCIENCE PARK





MAJOR ACCOMPLISHMENTS

More Tours, More Exhibits, More Events

In the past year, volunteers and staff have expanded their repertoires to include Rosson House express tours for our busiest times of year (which we seem to have more of all the time). Our VIP tours changed to include the very popular Victorian Secrets Unmentionable Tour, and the Rosson House Restored Tour, along with curator talks for exhibits. Celebrate the Holidays décor was a hit, and we sold close to 400 tickets for the Holiday Teas! *Plate Expectations: Victorian Dining, Decorum*

& Dishes, debuted in February 2018, showcasing pieces of our collection that usually languish in dark cupboards. And, coming this summer, our new exhibit *You are Here: Mapping Early Phoenix*, created in conjunction with the Maricopa County Records Office will go live in the Stevens-Haustgen Bungalow.

We added vendors and provided booths to partners for our Motoring Through Time & Heritage Festival this year, and celebrated our most successful event to date, with over 2,500 visitors. As we are gearing up for our fourth Gin & Jazz Preservation Party this year, we do so with more funding and community interest than ever.

Handcrafted workshops are bringing new local audiences to the Square, and have seen many come for repeat visits. We've showcased some amazing speakers, gone on field trips, and even started a Summer Camp for Grown-ups!

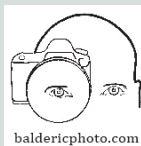
MAP

This year, with help from staff, board members, and volunteers, we completed a Museum Assessment Project, courtesy of the Alliance of American Museums (AAM) and Institute of Museum & Library Services (IMLS). The peer-review site visit introduced us to John Sherrer, who evaluated our operations and injected tons of ideas for growing the organization and strengthening our role as a cultural leader for Phoenix and the surrounding Valley.

Extended City Agreement

Our Board deserves major kudos this year for successfully negotiating a 5-year extension of our operating agreement with the City of Phoenix. This extension secures our partnerships to manage the Park until 2027, making the partnership between the Foundation and Parks & Rec the oldest such agreement in the City.

COMMUNITY PARTNERS



FY 2018 FINANCIAL STATEMENT

(Projected to June 30, 2018)

REVENUE

Contributions, Grants & Sponsorships	\$ 32,495
Individual Contributions	\$ 10,411
Admissions	\$ 51,099
Membership	\$ 3,920
Museum Store	\$ 14,809
Education Programs/Special Events	\$ 25,473
Tenant Rentals	\$ 112,200
Venue Rentals	\$ 151,621
Total Projected Income	\$ 402,028

EXPENSES

Program Services	\$ 41,580
Management & Operations	\$ 217,378
Collections Care & Preservation	\$ 12,500
Rentals & Tenants	\$ 120,050
Fundraising	\$ 10,200
Total Projected Expenses	\$ 401,708

BALANCE SHEET

(As of March 31, 2018)

ASSETS

Current Assets	\$ 304,017
Fixed Assets	\$ 28,066
Total Assets	\$ 332,083

LIABILITIES & EQUITY

Long-Term Liabilities	\$ 13,073
Equity	
Beginning Balance	\$ 36,398
Permanently Restricted Net Assets	\$ 4,311
Retained Earnings	\$ 144,015
Temporarily Restricted Net Assets	\$ 5,371
Net Income	\$ 128,915
Total Liabilities & Equity	\$ 332,083

BOARD OF DIRECTORS

Dan Killoren, PhD, President
Chatham Kitz, Vice President
Dean Isaac, Treasurer
Jennifer Steen, Secretary
Jerry Cook

Ann Cothron
Adam Driggs
Joel Eberhart
Alexander Kolodin
Christina Lucas-Sheffield
John Larsen Southard

STAFF MEMBERS

Michelle Reid,
Executive Director

Jennifer Hance,
Director of Education

Heather Roberts,
Director of Marketing

Sherri Starkey,
Director of Operations

Gina Trujillo,
Collections &
Handcrafted Manager

Amanda Peters,
Acting Director of
Visitor Services

Eric Gerry,
Museum Interpreter

Katie Delahoyde,
Museum Interpreter

Shannon Kolodin,
Events Assistant

Erika Swift,
Director of Events

Flare Elliot,
Visitor Services Mgr.

Michelle Soracco,
Visitor Services Assist.



LETTER FROM THE PRESIDENT

Members, Volunteers, Partners & Friends,

As we reflect on the past year at Heritage Square, there are many successes to share. Thanks to the continued dedication of our volunteers, staff & partners, we welcomed thousands of visitors to the Square, many for the first time, to experience urban living, both past, present & future. The Rosson House received some much-needed TLC, & we'll continue to work with our city partners to address deferred maintenance in the coming years. We enhanced the quality of events & programming, bolstering the status of the Square as a premier special event space in Phoenix. None of this would have been possible without the dedication of a growing group of supporters who work to ensure Heritage Square remains a special place.

The Board of Directors continues to focus on securing a long-term future for the Square & the value it provides. We amended our master use agreement with the City of Phoenix, further solidifying our unique & valuable relationship with the City of Phoenix and its Parks Department. We welcomed an expert reviewer to assess the our current activities & operations, & we look forward to his report on how we might continue to improve to meet the needs of our visitors & community. The financial position of the Foundation remains sound thanks to strong visitation & events, a growing base of philanthropic support, & the success of our restaurant tenants. The leadership of Heritage Square will continue to focus on the future & how we set priorities to deliver on our mission.

Spring is the perfect time to visit the Square, so please come down for a visit!

Dan Killoren

VOLUNTEERS

Tyler Alvez
Danielle Barger
Vicki Beaver
Barbara Brillhart-Bayer
Yvette Brown
Pat Bryant
Nancy Burnett
Jane Cadwalader
Marisol Garcia
Patty Goss
Glenna Grimes
Debbie Hendrix
Jillian Hendrix
Bradd Holcomb
Charlie Ihsen
Pat Ihsen
Tonia Jenny
Keia Johnson
Stan Kansas
Angel King
Renee Levy
Anne Lougher
Steven Lougher
Tom Santilli
Gail Simmons
Deanna Skaggs
Michael Swaine
Clara Teagarden
Nora Wigington
Ron Woodward
Joe Zveglich
Liz Zveglich

**Heritage Square is a 501c-3
nonprofit organization.
Your support ensures the
preservation of this unique
local landmark
EIN 86-0378502**