

Don't take our word for it! Here's what visitors to Heritage Square had to say...

This little spot is my favorite public space in downtown.

-Stevey, Phoenix

Wonderful way to spend an hour. It's not just antique decorations in an old house. Perfect for the whole family.

-Kim, Chicago

Thank you for getting me out of school!

-Akarsh, 4th Grade, BASIS Phoenix Central

Best \$7.50 I've spent. Take the tour. Support history and educate yourself.

-BlackX, Los Angeles

History in the hands of the caregivers.

-Randy, Hawaii

Who knew such a lovely historic home was in the midst of our downtown? Great history lesson and some very fine furnishings and antiques throughout.

-Deb, Tempe

My husband and I just had our wedding and reception here this past weekend. I couldn't have asked for a more special location.

-Jackie, Peoria

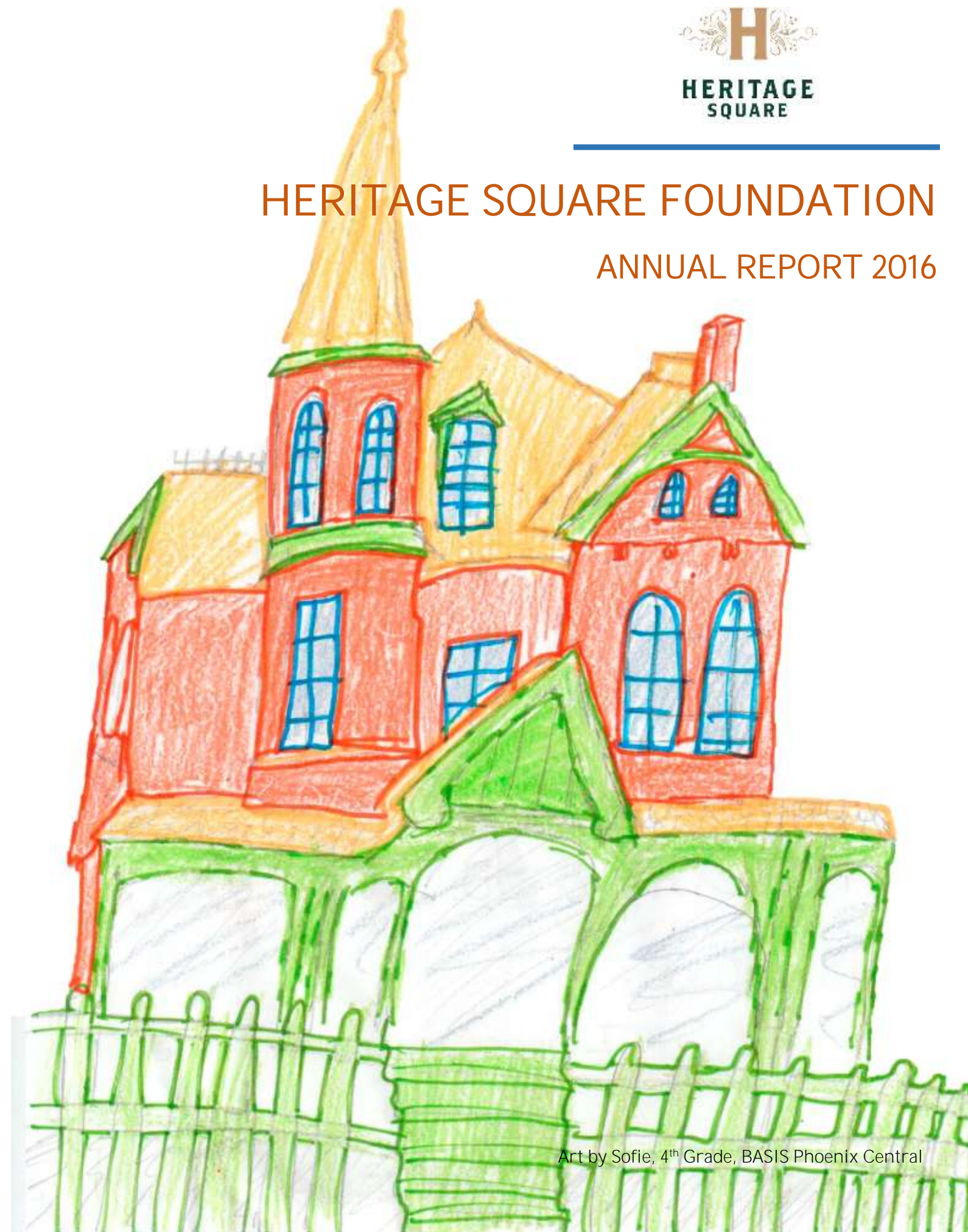
Beautiful home and very informative tour... so informative for the way people lived in that time! I'm visiting from out of town and can't seem to find any historical museums open during the summer. So, I feel this is the best historic site I've been to in the Phoenix area!

-A Google User



HERITAGE SQUARE FOUNDATION

ANNUAL REPORT 2016



Art by Sofie, 4th Grade, BASIS Phoenix Central

Heritage Square Foundation • 113 North 6th Street • Phoenix, Arizona • 85004

602-261-8063 • heritagesquarephx.org

Heritage Square Foundation is a 501c3 Organization. Your philanthropic support ensures the sustainability of this cultural site. Thank You!



OUR MISSION

Heritage Square – where the past and present ignite imagination

OUR VISION

To create a fun and engaging destination in the heart of Phoenix, through preservation, education, events and memorable experiences. To preserve the setting and structures and present historical interpretations of the people and history of the Square.

OUR GOALS

- To provide an authentic, immersive, and relevant experience of early Phoenix
- To reinforce the Heritage Square brand and identity to affirm excellence and to increase visibility and attendance
- To secure the Foundation’s long-term sustainability and success by developing excellent leadership, maximizing existing revenue sources, and developing new income



A Letter from the Executive Director Embracing Change

One year ago, as I compiled the 2015 Annual Report, I couldn’t imagine the change that lay in store for our organization. At that time, we were celebrating two years of continuous growth, successful new exhibits, and promising partnerships as we marked the anniversary of our first 35 Years. And then there was change. Looking back at the list of staff just one year ago, only two of those names are still here today. By the summer months, we were grappling with that horrible word, “restructuring.” As our beloved colleagues moved on to other jobs, we welcomed new faces and started the process of rebuilding the professional framework of our organization.

Throughout that process, the one constant that held us together was you – our donors, our members, our volunteers, and our friends. You welcomed new staff, shared your expertise, and enthusiastically supported new programming. You responded to appeals each time we asked and continually demonstrated your faith in the Foundations and its value in the community.

Thanks to your commitment, we are stronger today than ever. Our Board, staff, volunteers, and members strive to create meaningful experiences and lasting memories for all who “dare to be Square!” Thank you. You inspire me every day.



Volunteers

- | | |
|---------------------------|-------------------|
| Vicki Beaver D | Chakeia Johnson |
| John Bello | Kim Kasper |
| Barbara Brillhart-Bayer D | Renee Levy |
| Pat Bryant | Lynn Lindquist |
| Rene Burcham | Anne Lougher |
| Nancy Burnett D | Steven Lougher |
| Jane Cadwalader D | Sonji Muhammed |
| Alexa Contrades | Nancy Rabe |
| Peggy Cullen | Carlyn Rankin |
| Kaitlyn Dailey | Robert Rivera |
| Paula Glauz D | Mary Roberts |
| Patti Goss D | Gayle Simmons |
| Debbie Hendrix D | Tom Solnit |
| Theresa Hicks | Michael Swaine D |
| Mary Huck | Clara Teagarden |
| Pat Ihsen D | Charlotte Telleen |
| Charlie Ihsen D | Nora Wiggington |
| Liz Zveglich D | Joe Zveglich |

Staff

- | | |
|------------------------------|------------------------------------|
| Executive Director – | Michelle Reid D |
| Director of Education – | Jennifer Hance D |
| Collections Manager – | Gina Trujillo D |
| Visitor Services Manager – | Flare Elliot D |
| | Stan Kansas (until 11/2015) |
| Visitor Services Assistant - | Kimberly MacKenzie |
| Events Manager - | Erika Swift |
| | Andrew Davis (until 1/2016) D |
| | Samantha Anderson (until 8/2015) D |

Board of Directors

- Raymond Wong, President, D
 Jennifer Steen, Treasurer, D
 Donna Reiner, Secretary, D
 Ann Cothron D
 Dean Isaac D
 Abraham James III, D
 Dan Killoren, PhD, D
 Alexander Kolodin, D
 Steven Poe, D
 Mario Trejo Romero

- Development and Marketing Coordinator
 Heather Roberts D
 Museum Interpreters
 Jose Rivera
 Valerie Saunders
 Kathleen Vick

“D” indicates donor



FY 2015-16 Accomplishments

Over 19,000 people visited the Rosson House Museum throughout the year. Record months included March and November.

In October 2015, we opened an exhibit in partnership with the Heard Museum, Native American Connections, and the Phoenix Indian Center; [The Phoenix Indian School Legacy Project](#). The exhibit provided the basis for a new type of expanded interpretation on the Square.

We added a second digital archives collection to the [Arizona Memory Project](#); [The Silva House at Heritage Square](#). The Alejandro and Maria Jesus Silva family was influential in early Phoenix and resided on the Square.

We created new traditions! Last May, we celebrated the Foundation's 35th Anniversary with a signature event, [Gin & Jazz](#). Now in its second year, this 20s-themed Prohibition Party is already a favorite among downtowners. In December, another tradition was born - [Heritage Square Holidays](#). The season will never be the same as we added programming to dressing the Rosson House in Victorian finery.

[Motoring Thru Time and Heritage Festival](#) became ours. A change in City leadership left one of the Square's most popular festivals without a host - and the Foundation stepped in. Motoring Thru Time and Heritage Festival is now ours, and we will continue to build an immersive learning opportunity through the auto exhibit and hands-on demonstrations and crafts.

Our organizational [finances were reviewed](#) for the first time in several years. An outside review of operations is so important for raising the maturity level of a nonprofit. The review resulted in great news about our financial outlook and ability to sustain our mission. Stay tuned for more accounting updates in the near future!

New signs bearing the [Heritage Square](#) logo were placed on the Square. All of Heritage and Science Park is decked out in our signature green.

We are getting rave reviews from visitors! We were named on [Yelp's 10 Best Museums](#) in Phoenix list (#4) in January 2016, and made it into an international blog, [The Culture Trip](#) as one of Phoenix's top 10 Best Kept Secrets in February 2016!

Our Educational Programs in Action!

This fiscal year saw a change in staffing for education programs. Due to the excellence of the programs in place, new Director of Education, Jennifer Hance, was able to pick up and offer a full season of k-12 tours. We continued to offer *A Child's Life in 1900* and have doubled the number of schools returning year after year. Homeschool Days continue to sell out with many families returning again and again. School and Homeschool tours have grown by 30% to reach 1500 people.

We also launched a second field trip titled "Early Phoenix" which uses maps and primary sources to explore early Phoenix and Arizona territorial politics. The tours focus on the renovation of the Rosson House and clues to its original features. Early Phoenix is available to middle schools and older homeschool families.

3/4 of our education budget is devoted to K-12

Over 1600 people enjoyed interactive Snow Week activities. Foundation programming includes concepts in math, science, art, literacy, language arts, as well as history and civics. Museums are Educational Powerhouses!

We offered another full season of continuing education for our volunteers. In order to boost interest and attendance, we sought advice from the volunteers about what types of programs they enjoy. We have trained several new docents this year who are anticipating their own tours and helping with events.

Heritage Square Holidays was launched in 2015. Interior designers took on the task of decking out the House in holiday finery, and tea events complimented the festivities. Interpretation was delivered through a take home booklet. Snow week was also a big hit. We capitalized on the number of families visiting the Science Center and free activities for the young and young at heart. Much to our delight, over 1600 people participated!

We applied the model for Heritage Saturdays to Motoring Thru Time and created the Heritage Festival. The lawn behind the museum store was full of demonstrators of different traditional crafts from a variety of traditions.

Sadly, we have bid farewell to some educational programs this year. Lost funding for our traveling classroom trunks results in a scaled back program, and after reformatting First Fridays and Summer Camp, with little public response, we have diverted our time and energy into programs that cost less and reach wider audiences.



Financials

GROWING AUDIENCES

Total Park Attendance:

512,000

Total Rosson House Museum
Guests:

19,293

ACT One Culture Passes
Redeemed:

1,274

Number of "Zombies" Served:

378

Number of Hours Given by
Volunteers:

1,945



Operating Funds For the Year Ending June 30, 2016 (projected)

CONTRIBUTIONS & GRANTS

| | | |
|---|-----------|---------------|
| Individuals | \$ | 12,005 |
| Grants | | 3,000 |
| Gifts in Kind | | 5,481 |
| Total Contributions & Grants | \$ | 20,486 |

EARNED INCOME

| | | |
|-------------------------------------|-----------|----------------|
| Admission | \$ | 39,254 |
| Membership | | 2,765 |
| Museum Store | | 15,812 |
| Educational Programs/Special Events | | 6,607 |
| Interest & Other | | 2,600 |
| Rentals | | 239,400 |
| Total Earned Income | \$ | 306,438 |

| | | |
|----------------------|-----------|----------------|
| TOTAL REVENUE | \$ | 326,924 |
|----------------------|-----------|----------------|

EXPENSES

| | | |
|-------------------------|----|---------|
| Program Services | \$ | 20,770 |
| Management & Operations | | 196,805 |
| Rentals | | 86,850 |

| | | |
|-----------------------|-----------|----------------|
| TOTAL EXPENSES | \$ | 304,425 |
|-----------------------|-----------|----------------|

INVESTMENT FUNDS (Balance 4/18/2016)

| | | |
|-----------------------------------|-----------|----------------|
| Heritage Square Endowment | \$ | 6,069 |
| Heritage Square Operating Reserve | | 102,788 |
| Money Market Account | | 86,499 |
| TOTAL INVESTMENT FUNDS | \$ | 195,356 |

A Letter from the President Change for Good



As I look around Central Phoenix over the past year, I see substantial change. Numerous empty lots are being consumed by new construction and unfortunately, some not so empty lots are also seeing new construction at the cost of historic gems. Thankfully, Heritage Square is one place we can count on to remain for generations to come. This lack of change is only skin deep, however; the Square continuously changes for the better. From staff changes to programming, to philanthropy, the leadership of the Square safeguards the vision set forth over 35 years ago; preserving our past for the sake of the future.

In the last year we have seen substantial change with our staff, but it is surely the change you would like to see. Many of our staff members have taken new career endeavors, moving on to companies or roles they positioned themselves for educationally. Some have taken on career paths in other cultural institutions which will help us deepen connections and partnerships long term. Regardless of the reasons they've moved on, one thing is certain, the Foundation's successes have helped them grow their resumes and take their careers to the next level. I am very thankful for these past teammates' contributions, but these turnovers underline a greater need - to ensure Heritage Square is a competitive employer and the destination for top talent, not the stepping stone.

Although we have said goodbye to a number of staff members, the positions were quickly filled with talented new assets that have continued the great work going on at the Square and have brought fresh innovative ideas. Our staff continues to work on new unique exhibit offerings such as Handcrafted, Dressing Downtown, and Trunk & Treasures. Additionally, we have expanded programming, and our school tours increase. The City has recently acknowledged our capability by handing off a staple annual event to us; Motoring Thru Time and Heritage Festival. In so many ways, our Square and the team managing it continue to gain momentum year over year.

All of this change comes at a price, the cost of transitioning new staff, taking on more responsibilities from the City, and expanding our programming to ignite visitors' imaginations and inspire the next generation of preservationists. The Foundation takes this responsibility seriously and we are creating annual events such as AZ Gives Day, Gin & Jazz, and the Holiday Kick Off Party to foster philanthropic giving. Already we have seen the effects with donations more than doubling over the last few years.

Phoenix will continue to grow and change, but Heritage Square will surely be a cornerstone of that growth as an icon, reminding us where it all began. As our city takes shape over time, the Foundation will remain true to its mission, preserving this special place, and ensuring that proper change occurs - change that allows us to tell the story of Block 14 and to preserve the diverse heritage of Phoenix for generations to come.

Raymond Wong Jr.