ANNUAL REPORT
2021
Members, Partners, & Friends.

The staff of Heritage Square has worked hard to recover from the economic fallout from the pandemic, and I’m pleased to report we were able to operate in the black for fiscal year 2022. Although Rosson House operated at limited capacity and programs were also limited due to staff shortages, we received forgiveness for our second round Paycheck Protection Program loan, and grants, donations, and revenue from tours, programs, and rentals has been improving.

While we were limited in the tours and other programs we could provide last year, we still saw some important outcomes. We partnered with Safety for Nonprofits to begin conducting risk assessments and safety training. The Lath Pavilion received a face lift with a complete replacement of all the wood slats, making it an opportune time for the festivals and private events that have started to return. And we welcomed a new tenant, The Diaspora Collective, which will open their retail/restaurant this Fall.

As we look ahead to the rest of the new fiscal year, we are optimistic and excited. Watch for new exhibits, programs, special events, and more new tenants. Heritage Square is back!

Thank you all for your continued support. See you at the Square!

Kevin Lozier
Heritage Square Board President

Remember...

No matter the amount, the stability of monthly or quarterly donations can make more of a lasting impact than one-time donations. Visit our website at heritagesquarephx.org/donate or contact our staff to upgrade your giving today!
FY 2021-22 FINANCIALS

REVENUE
- $224,035
  - $219,617 Contributed Revenue
  - $4,418 Earned Income

EXPENSES
- $236,460
  - $74,544 Non-Personnel Expenses
  - $161,916 Personnel Expenses

BALANCE SHEET
- Current Assets: $195,422
- Fixed Assets: $4,862
- Liabilities: $97,909
- Equity: $102,375

STAFF MEMBERS
- Kari Carlisle
- Ashley Davis
- Zoe Garrett
- Eric Gerry
- Jennifer Hance
- Elizabeth Kennard
- Sarah Matchette
- Noelle Porterfield
- Heather Roberts
- Cara Vandermiller

VOLUNTEERS
- Vicki Beaver
- Barbara Brillhart-Bayer
- Sadie DeShon
- Mary Munoz Encinas
- Patti Goss
- Debbie Hendrix
- Pat Ihsen
- Anne Lougher
- Sharon Presley
- Beverly Richards
- Gayle Simmons
- Sammi Tester
- Pamela Yellin
- Liz Zveglich

EXECUTIVE BOARD
- Kevin Lozier
- Gerald Cook
- Laura Read
- Leah Harrison
- John Larsen Southard
- Raymond Wong

COMMUNITY BOARD
- Andrew Abraham
- Luis I. Cruz
- Adam Driggs
- Diane Erhart
- Patrick Greiner
- Clottee Hammons
- Tobias Hogan
- Patty Talahongva

INTERN
- Asa Espanto
Heritage Square Foundation is dedicated to preserving and sharing the stories, collection, historic buildings, and grounds of Heritage Square, serving as a relevant, engaging and inclusive community resource, and as a tangible connection to our diverse local history.

Thank you