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# Leadership



# Executive Team

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**Alex Fernandez** 

Chief Operations Officer

**Chris Hirano** 

Chief Development Officer

**Tony Huey** 

Chief Financial Officer

Nova Maldonado

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Guillermo Viveros

Fight. Love. Live. -

# 2019-2023 Strategic Plan

Filoli proudly accomplished the goals of the 2019-23 Strategic Plan and began the process for an ambitious 2024-28 Plan.

# Sonnections

# gimming

# People & Culture

- Completed a staff
   compensation assessment,
   implemented pay grades for
   salary transparency, and
   continued to invest in a living
   wage minimum salary to
   support pay equity
- Recruited nine new board members who represent diverse communities and will expand the board's perspectives
- Expanded leadership and hired a new Chief of Staff
- CEO Kara Newport was chosen as one of the Top 50 Museum Influencers by Blooloop

# Fundraising & Financial Strength

- Welcomed a record-breaking 416,912 visitors in 2023
- Increased revenue by 28.3% and membership by 15.9%
- Annual Fund donors set an all-time record, totaling 124% of the donation goal



# Infrastructure Investments

- Completed the Ballroom
   Terrace with leadership
   support from David Wollenberg
   and other donors enhancing
   an under-utilized area to create
   a beautiful new event and
   program space
- Developed a new entrance experience that highlights prime vistas and aligns with the Comprehensive Site Plan vision
- Refinished the Ballroom and Dining Room floors, returning them to their original color and condition
- Refreshed weathered paint on the exterior windows and doors of the main House with funding matched by the National Trust for Historic Preservation Historic Sites Fund

# Visibility & Branding

- Hosted President Biden and President Xi of China for a bilateral conversation
- Boosted Instagram followers by 38% and broke 50,000 followers
- Increased earned media
  mentions by over 1,000% for
  a total of 10,486 mentions;
  including publications such as
  BBC, Washington Post, NBC
  California, Secret San Francisco,
  ABC 7, People's Daily China,
  and many more local, national,
  and international media outlets
- Featured as a "world's greatest" botanical garden on Bloomberg's nationally televised World's Greatest show and chosen as one of "Top 10 Gardens Worth Traveling For" in North America by the Garden Tourism Board

# Learning & Engagement

- Hosted 1,000 individual youth visitors across multiple visits for field trips and nature education with our community partners
- Increased Service Learning volunteer participation by 110%
- Developed over 30 Community
   Partnerships and 10 Youth
   Program Partners
- Launched the new Partner Plots program in the Vegetable
   Garden with Pasifika Planting
   Group, with more partners
   to come
- Launched teen programming, including multi-visit field trips and teen internships in Horticulture and Visitor Services
- Introduced Summer Stage, a series of vibrant live performances against the backdrop of the historic House





# Jam

Members browse the beds, enjoying early access to the quiet Garden before general admission begins. They're looking for inspiration for their own vegetable plots at home and stop Jia to ask for her advice about pollinator-friendly flowers to plant next to their tomatoes.



# 11am

The murmur of little voices gets louder and louder as a line of preschoolers tromp through the gate, hand in hand. Danae Bravo, Filoli's Programs

Coordinator, is leading their field trip – it's part of the program that offers adventures in nature to children from low-income households. Danae explains in Spanish how to pull up a radish from the ground. The teachers think the children won't like the spicy taste, but surprise... they do!



#### **Outdoor Classroom**

In 2023, nearly 1,000 Bay Area children visited Filoli for nature education via field trips funded by Filoli donors.

# 1pm

The Pasifika Planting Group arrives to tend their plot in the northwest corner of the garden. Led by Tongan poet and farmer Loa Niumeitolu, these members of the Bay Area Pacific Islander community are partnering with Filoli to grow vegetables here. Today, they are weeding the rows of taro, sī plant, kava, and kumala sweet potato – crops with important cooking and ceremonial uses in Pacific Islander cultures.

## Garden Tip

Experiment with the addition of edible flowers; they will add flavor and color to your garden and salads!

– Jackie Salas, Horticulture Production Manager

# 2:30pm

With the work done, the Pasifika group comes together to sit down and share stories of their connections to these foods. They'll be back in the summer and fall to harvest.





# 4:30pm

The last visitors of the day walk down the main path as the late afternoon light turns golden. A giggling couple takes photos inside the tunnel of yardlong beans, as another family exclaims over a Chinese vegetable, realizing it's the same type their grandmother cooks.



## Garden Tip

Make your garden more sustainable by choosing plants with lower water requirements or selecting perennials over annuals when possible.

– Jim Salyards, Director of Horticulture

# 5:50 pm

Several Filoli employees detour through the Vegetable Garden on their way to the staff parking lot. They want to check on the progress of the hops that are hanging in clusters from the berry cage.



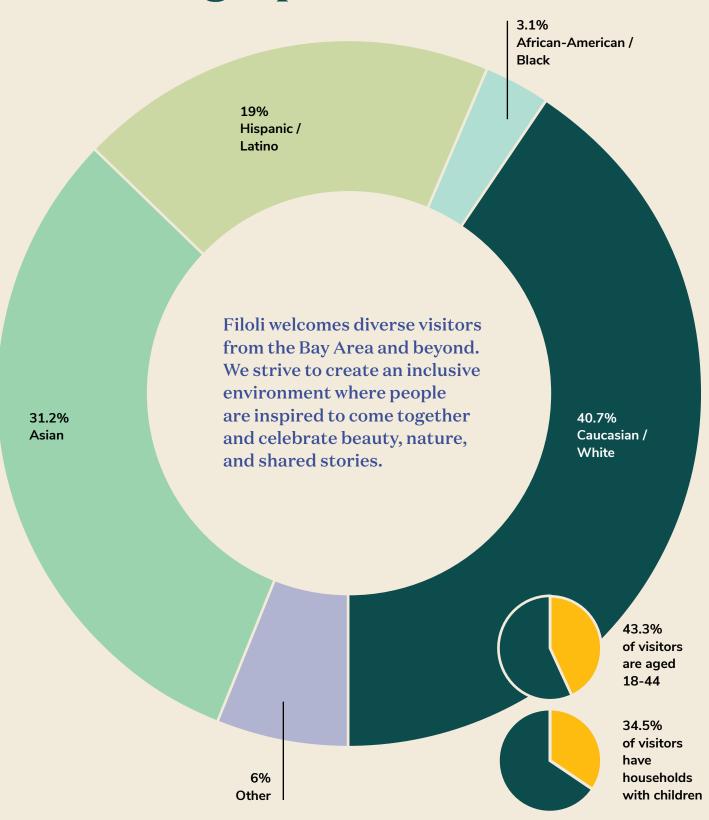
# 7:45 pm

The last rays of sun disappear, and the Garden is empty again... except for the creatures who call it home when it's dark. The black cat returns, sauntering down the main path on his way to the warm greenhouse for the night.





# Visitor Demographics



# Access

# Redesigned our membership program

to include a guest at all levels and added a Family for All membership level for EBT cardholders

# Provided 8,939 total free admissions

through programs and partnerships from local communities in-need

## Grew participation in Service Learning Volunteer Program

to an increasingly diverse population, 1 in 3 of whom are first-time visitors to Filoli!



Love Your Fellow Man



# Financials

# Statement of Financial Position

Year ended
December 31

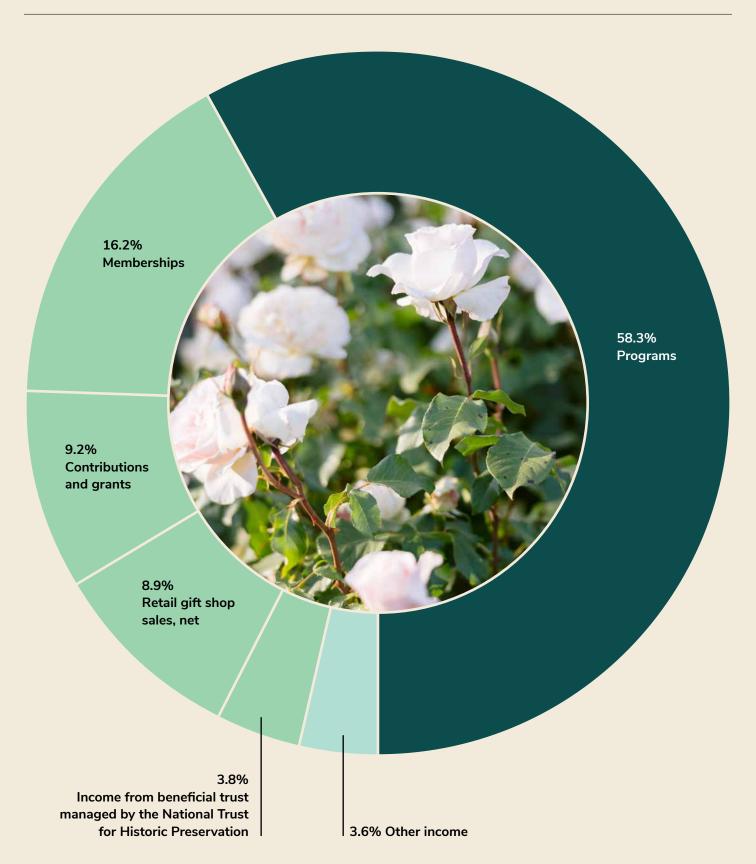
Assets	2023	2022
Cash and cash equivalents	\$7,252,899	\$4,804,455
Board-designated cash	\$3,869,830	\$3,163,586
Receivables, net of discount	\$233,314	\$131,002
Prepaid expenses	\$553,617	\$471,891
Inventory	\$359,468	\$274,955
Investments	\$538,640	\$473,455
Board-designated investments	\$8,122,880	\$9,802,094
Property and equipment, net	\$7,555,215	\$6,215,448
Total Assets	\$28,485,863	\$25,336,886
Liabilities and Net Assets	2023	2022
Total Liabilities	\$3,142,416	\$2,059,347
Net Assets	\$25,343,447	\$23,277,539
Total Liabilities and Net Assets	\$28,485,863	\$25,336,886

# Statement of Activities

Year ended December 31

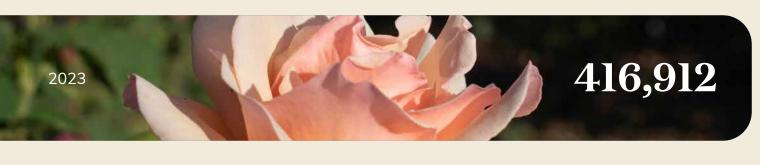
Revenue and Support	2023	2022
Contributions and grants	\$1,529,450	\$1,991,545
Memberships	\$2,706,551	\$2,177,724
Programs	\$9,742,070	\$7,442,687
Retail gift shop sales, net	\$1,482,955	\$1,430,433
Income from beneficial trust managed by NTHP	\$631,141	\$618,766
Other income	\$601,126	\$147,725
Total Revenue and Support	\$16,693,293	\$13,808,880
Expenses	2023	2022
Program services	\$11,689,528	\$9,173,782
Management and general	\$2,147,673	\$1,640,277
Fundraising	\$1,800,859	\$1,205,917
Total Expenses	\$15,638,060	\$12,019,976
Other Changes in Net Assets	\$1,010,675	(\$2,294,500)

## Revenue



# Visitation

ANNUAL ATTENDANCE



404,163

380,723

191,240

2019 232,147



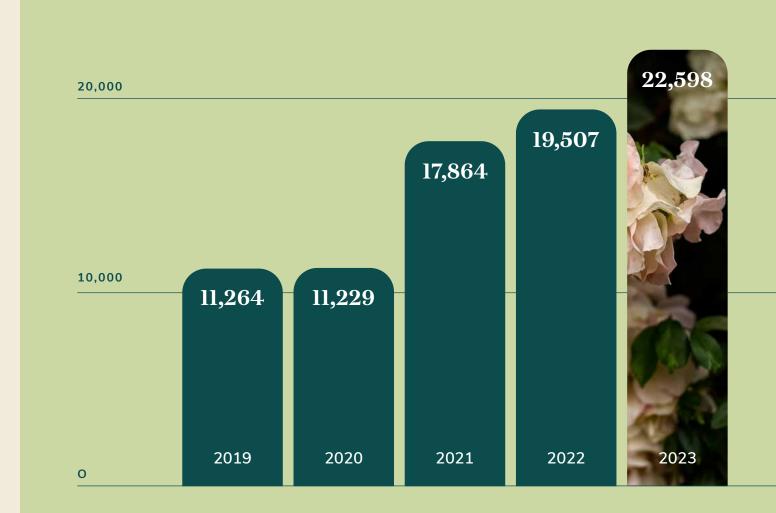
# Membership

Filoli members share a special connection with the estate as it changes across seasons and provide foundational support for all we do year round.

19

**END-OF-YEAR MEMBERSHIP** 

30,000



# **Public Programs**

## **Partnerships**

Filoli partners with the
Association of Ramaytush Ohlone
(ARO) to co-create programming
and interpretation related to
Ramaytush Ohlone history,
culture, and contemporary
community. In 2023, Filoli and
the ARO began work on the
now completed Lamchin
Interpretive Center.

## **Youth Programs**

With the support of the June & Julian Foss Foundation, the Goldman Family Foundation, the Leiter Family Foundation and private donors, Filoli continued to expand preschool and teen programs, hosting 1,000 Bay Area children on multiple field trips to Filoli throughout the school year. The children discovered Filoli across the seasons and can now lead their own families on field trips to Filoli with free annual Community Family memberships.

## Vegetable Garden

This edible landscape is a place to gather and share food traditions. The Garden reflects many Bay Area food cultures and hosts youth field trips and the community Partner Plots. The abundant harvest is donated to local food banks, incorporated into foods sold at the Clock Tower Shop, and enjoyed by staff, partners, and public program participants.

#### Pride

Filoli celebrated the LGBTQ+
community with a weekend of
joyful, creative expression and
experiences throughout the
House and Garden. Opening with
a night of Dragtopia glam,
performances included Drag
Queen Storytime, Queer Taiko,
the Gay Freedom Band, a sound
bath by Banyan Tree Women's
Collective, and colorful Mexican
folk dancing.

## **Exhibits**

The House bloomed with lush greenery and flower arrangements as the Bringing the Garden Indoors exhibit highlighted the Bourns' nature-inspired design and decor. Outside, Yoko Kubrick's abstract marble sculptures evoked classical mythology and echoed the organic forms of the Garden.

# Summer Stage

Visitors relaxed in the Meadow at sunset while enjoying a series of live music and dance celebrating the Bay Area performing arts community.









# **Public Programs**

## **Orchard Days**

The harvest brought several weekends of celebration to Filoli. Hispanic Heritage Weekend included music and dance performances from Folclórico Colibrí and Cunamacué. Our community partners also helped us to celebrate the Jewish harvest festival of Sukkot, the Chinese Mid-Autumn festival, and the Persian fall festival of Mehregan with beautiful and engaging displays.

## Indigenous Peoples' Day

Our partners at the Association of Ramaytush Ohlone and Pasifika Planting Group shared stories, songs, and poetry to celebrate Indigenous Peoples' Day.

## **Summer Nights**

Guests came in record numbers to enjoy summer evenings strolling the House and Garden. They listened to live music, lounged, and played lawn games as the sun set behind the Santa Cruz Mountains.



## Stories in Bloom

This series of events brought artists of all kinds – from poets to novelists, musicians, and photographers – to Filoli showcasing storytelling to broaden the Filoli and local narratives.

## Service Learning

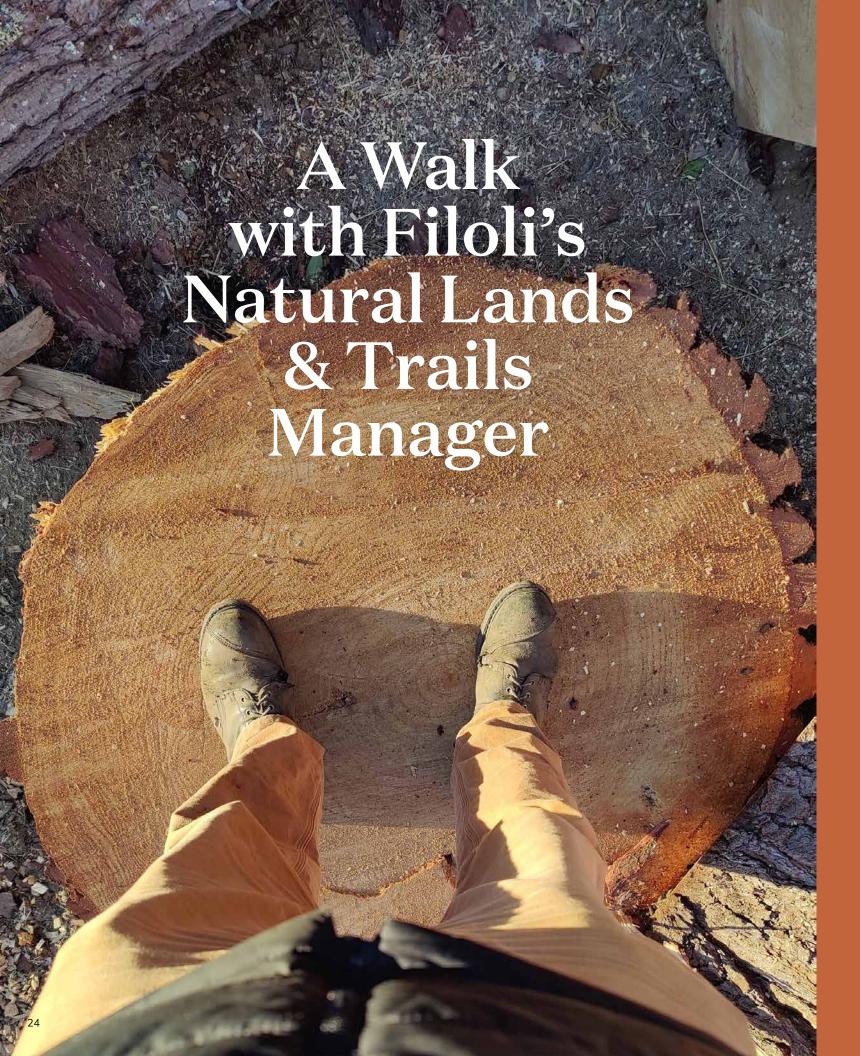
In the second year of Service Learning, Filoli's new model for volunteerism, 650 participants gave 2,400 hours of service. They cleared trails, prepared the Orchard for fall festivities, and helped care for the Garden.

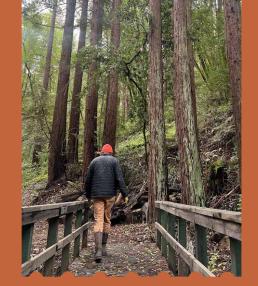












an Walsh is walking along the Spring Creek Trail in Filoli's forested hills. As light filters in through the canopy, his tall frame and overalls make him easy to follow on the path. Every now and then, he bends to push aside a rogue branch blocking the way.

Though the redwoods tower impressively overhead as Ian walks along the creek, none of them are old-growth trees. Loggers stripped the mountain slopes behind Filoli in the 1800s to supply the construction of San Francisco as its population ballooned. At peak, 35 mills dotted these hills, and teams of oxen pulled huge, felled trunks down to Redwood City to be loaded onto boats.

With this history in mind, Filoli today is committed to stewarding this land for the future – and one important step in 2023 was hiring lan as the first Natural Lands & Trails Manager.

At the top of the trail, lan leans on a railing overlooking the creek bed and reminisces about a childhood spent outdoors. Years as a Boy Scout taught him to love camping, and he later worked as a land steward on an island off Cape Cod. After living on the East Coast and in the Midwest, California is a new frontier for lan – he's excited to learn about this unique landscape and its challenges.

He crosses a bridge over the part of the creek where atmospheric river storms in January 2023 dropped huge logs and debris. Hardy Girl Scouts have cleared the mess of tangled branches once dammed by this bridge to allow the water to flow again, and Ian sees it as a reminder that even Filoli's Natural Lands require tending and updated infrastructure.

lan's first order of business at Filoli has been the trails, which he hopes will enable visitors to explore more of the 654 acres of Natural Lands across a variety of ecosystems. First, though, he has to make sure the pathways are clear and welcoming. He'll need to remove rickety stairs on a sloped part of the trail nearby and widen the trail in other spots.





Filoli is dedicated to nurturing and growing diversity, equity, accessibility, and inclusion in all that we do. Our core mission is to connect our rich history with a vibrant future through beauty, nature, and shared stories. We strive to create a sanctuary for healing and building connections for all people. We are open to all and work tirelessly and collaboratively to create a place that welcomes and respects everyone. We strive to live our credo authentically to fight for a just cause, love our fellow man, and live a good life.

- Added three multicultural harvest displays to Orchard Days
- Our partnership with the Ramaytush Ohlone included a moving Indigenous Peoples' Day program for 250 attendees
- Convened an internal DEAI Task Force of cross-departmental team members to evaluate Filoli's DEAI Action Plan and make tactical recommendations for the new five-year Strategic Plan
- Celebrated the LGBTQ+ community during Filoli Pride, including holding the first Dragtopia event, which was a sell-out success

# User-Generated Content

We love seeing Filoli through our guests' eyes. Photos shared on social media were used to add their perspectives to our website and printed materials.







Creating Memories

# Sustainability

Sustainability is rooted in Filoli's core and guides our everyday decisions as we plan the future of this historic place.

- Hired new Natural Lands
   Manager to drive initiatives
   as part of Filoli's ongoing
   commitment to sustainable
   land stewardship
- Completed tree work around key electrical infrastructure with support from PG&E and developed a grant project for wider wildfire mitigation with the support of FEMA
- Improved hiking trails and replaced the storm-damaged Spring Creek Bridge with the support of the Maxwell/ Hanrahan Foundation
- Launched sustainability
   initiative with assessment by
   Filoli's new Sustainability
   Coordinator, resulting in an
   action plan for 2024
- Shifted retail to support 60%+ of all our purchasing from California and local vendors





# Preservation

 Refreshed the paint on the exterior windows and doors of the main House with support from the National Trust for Historic Preservation Historic Sites Fund

- Painted and restored
   Cloakrooms to their original
   historic color and furnishings
- Restored the Dutch
   masterpiece by Jan Weenix
   to its full glory and returned it
   to its place of honor in the
   Dining Room
- Redesigned and replaced all lighting in the House with energy efficient and color-appropriate bulbs

- Refinished the floors

   in the Ballroom, Dining Room,
   holding room, and Ballroom
   vestibule
- Made new acquisitions
  including sought-after items
  matching those that the Bourns
  owned from furniture to prints
  and ceramic arts which
  embrace Agnes Bourn's original
  vision for the House as a
  relaxed space nodding to
  themes of nature and women.
  The painting "Verdant
  Landscape" by artist Betty Ecke,
  which was previously owned
  by the Roths and displayed
  at Filoli, was also restored to
  the collection.

for Tenerations



# **Events**

# Holidays at Filoli

This year, Holidays at Filoli, presented by PG&E Corporation Foundation, welcomed a record-breaking 120,199 visitors — an increase of 47.8% over the previous year! Visitors wandered through the Garden illuminated by miles of lights and were dazzled by the dynamic colors of the 23,000 bulbs in the light tunnel. On the Woodland



Terrace, visitors gathered around fire pits with loved ones and a warm drink and visited with Santa on the weekends. Inside, the House was resplendent with twinkling trees, and tables set in the Ballroom showcased cultural holiday celebrations from around the world.





## Gala in the Garden

2023's Gala in the Garden raised funds for nature programs at Filoli. The nearly 200 guests enjoyed dinner on the Bowling Green while hearing from honored guest Representative Jackie Speier.





On the first architectural plans for Filoli, the project is titled "A Residence for Mrs. Bourn." Agnes Bourn pored over the drawings, supervising every small detail of the new home she and her husband William envisioned as "a place to grow young" in their twilight years.

One of few women in her time to have her own passport and a Rolls Royce registered under her name, Agnes was equally bold in her design eye. She knew what she liked and shaped Filoli to reflect how she wanted to live.

When the House was finished, she set about furnishing the interior in an eclectic fashion and with comfort in mind. Posh antique cabinets and Tiffany mantel clocks were displayed next to inexpensive prints and souvenir knick-knacks from her travels, in an early version of what we might today call "high-low" style. Together with William, she chose paintings and sculptures from West Coast artists, often opting for pieces featuring gardens, women, and California landscapes.

It wasn't an instant process but rather a long-term project for Agnes. In 1924, she wrote, "For Will and me, Filoli is quite perfect. It progresses little by little, but it takes time to develop a place if it is to have charm and individuality."

After the Bourns passed away in 1936, the Roth family purchased the House fully furnished and kept its design mostly the same while adding their own personal touches. But when Lurline Roth donated Filoli to the National Trust for Historic Preservation in 1975, many traces of Agnes' interior decoration were gone. The

House was empty, with most of the furniture and objects sold at auction or taken with Lurline when she moved out. Since then, as Filoli opened to the public as a museum, the inside has been dressed differently over the years.

Our quest today is to restore the House to reflect Agnes' original vision. Our Curatorial team is actively re-collecting original objects and redecorating the rooms in the Bourns' aesthetic. But it goes beyond the objects themselves. We also hope to restore the sense of Filoli as a family home, full of the small details and ephemera of life, the green of house

"For Will and me, Filoli is quite perfect. It progresses little by little, but it takes time to develop a place if it is to have charm and individuality."

#### AGNES BOURN

plants, and the stylish and quirky accents that Agnes originally chose. This project starts under your very feet.

Over the past few years, we have been restoring the oak wood floors of Filoli to their original dark stain. Even if you aren't a floor connoisseur, you'll notice that it makes a big difference and completely changes the feel of a room. In 2023, we refinished the flooring of both the Ballroom and Dining Room – two of the most impressive rooms in the House. A big decision in the Ballroom was whether to keep the stage, which was not an original part of the historic space. Our eventual compromise was to lower and shrink the stage, so it doesn't have as large an impact on the overall feel of the room.

The walls of each room also tell their own story. While repainting the Cloakrooms, Kevin Wisney, Filoli's Curator & Director of Collections, discovered that the walls were originally painted the same color as the other historic staff spaces. Years of use as the ticket office meant this evidence was covered up by

modern paint. It may seem like a small detail, but this reshapes how we imagine a guest of the Bourns or Roths may have entered the House. They were unlikely to have spent time in the Cloakrooms (other than to use the restroom) as the butler would typically take their coat in the Foyer and usher them into the Reception Room. Wall "archaeology" like this uncovers the layered past and informs how we set the House today. As of January 2024, all visitors are now invited to enter the House through the grand Foyer doors, just as the Bourns' visitors would have.

Wisney is also on the hunt for Filoli's "lost treasures" – original furnishings that he'd love to return to their rightful place. His team pores through historic photos, inventories, and auction catalogs in search of Bourn purchases, like paintings by Mary Curtis Richardson, a California impressionist painter, or small animal bronzes by Arthur Putnam.

A big success in 2023 was the return of a painting by artist Betty Ecke that the Roths owned and displayed at Filoli. Ecke, also





known as Tseng Yu-ho, was a famed Chinese-Hawaiian artist known for her pieces that blend abstract and ancient styles. "Verdant Landscape" has since been restored to the same wall in the Family Room where the Roths displayed it, helping us recreate the space's layered, homey feel and adding a work by a woman artist to the collection.

Perhaps the most fun aspect of restoring the House is infusing it with life. No one's home is staged perfectly all the time – we fill our spaces with music, plants, and everyday items like books, hats, and toys.

Filoli's Horticulture team has the creative task of filling the House with greenery and floral arrangements in the tradition of the families who lived here. Using plants from our greenhouses and fresh flowers from the Cutting Garden, the horticulturists create seasonal "moments" throughout the space. You may see a structural showstopper of blossoming fruit tree branches in early spring, a vase of eye-catching colorful dahlias in summer, or an accent of spiky green chestnut balls in autumn. The designs are inspired by Bourn-era photographs, and, together with

the lush green of tall house plants, they make the House feel dynamic and alive.

Adding ephemera to Filoli's rooms can also be an opportunity for creative storytelling that feels more natural than an interpretive sign.

A kid's record player on the floor, surrounded by open magazines and popcorn spilling out of a bowl, tells the story of a Roth grandchild relaxing in the Family Room in the 1960s.

A cabinet of tools, hung-up newspaper ads, and a warm coat draped over a chair in the Wood Room conjure up a Bourn-era groundskeeper's winter afternoon. And three tea cups on a table next to a kicked-off pair of shoes set the scene of Agnes hosting close friends in the Drawing Room.

Thank you for your support as we preserve the Filoli House and restore it to conjure up the stories of those who lived here in the past. We may not be able to go back in time to meet Agnes and Filoli's other original residents, but we can still immerse ourselves in their style. After all, you can tell a lot about someone by walking into their home!

# **Donors**

Filoli's community of supporters keeps Filoli open and accessible for guests to find beauty and inspiration in every season.

Please contact development@filoli.org with any questions. We appreciate every gift. Space constraints allow us to list only gifts above \$500.

**=** Filoli Circle member



## \$50,000 and Above

Eleanor L. Macdonald Trust
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## \$10,000 -\$49,999

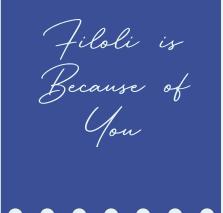
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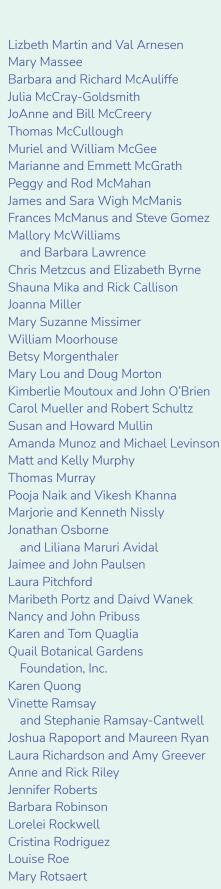
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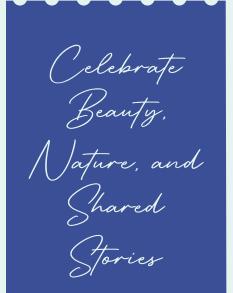
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#### **Annual Fund**

The Annual Fund makes the Filoli experience possible. From the daily care and maintenance of Filoli's grounds and collections to public programs and events, these gifts support Filoli's greatest needs. In 2023, gifts to the Annual Fund were used for Garden projects like the renovation of the 50 year-old Knot Garden and the restoration of the historic Olive Orchard into what will eventually be a production orchard once more.

In 2024, gifts to the Annual Fund will be used for exciting projects like the restoration of the Ballroom. The paint, artwork, and gilded trim are original to the House and in need of a refresh. The Ballroom will be restored to its original glory in time to glitter with holiday lights!

#### Filoli Circle

Circle membership strongly engages with Filoli's mission, vision, and programs. Benefits include concierge services, access to special events, and extra discounts. Join or upgrade at any time.

### **Future Projects**

Restoration projects in the
Ballroom will return this space
to its original glory; maintaining
Filoli's miles of trails allows
visitors to experience our vast
Natural Lands; Youth Programs
continue to expand at Filoli;
and exciting plans are underway
to redevelop the Cañada
Road Entrance!

### **Legacy Society**

The Legacy Society helps preserve and enhance the Filoli estate for the next century. Donors receive immediate benefits from planned gifts and can know they leave a personal legacy by investing in Filoli's future.

Thank you to our contributing photographers: Jeff Bartee, Luigino De Grandis, Albert Dros, Parker Guban, Arthur Hitchcock, Mike James, Robert Most Bringing friends to Filoli is a great way to show your support!