

2018-2019 Annual Report
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The Preservation Society of Newport County 424 Bellevue Avenue Newport, RI 02840 (401) 847-1000

#### $NewportMansions. {\tt org}$

#### **OUR MISSION**

Great Houses connect people to a nation's heritage and open windows to another age. The Preservation Society of Newport County is a non-profit organization whose mission is to protect, preserve, and present an exceptional collection of house museums and landscapes in one of the most historically intact cities in America. We hold in public trust the Newport Mansions which are an integral part of the living fabric of Newport, Rhode Island. These sites exemplify three centuries of the finest achievements in American architecture, decorative arts, and landscape design spanning the Colonial era to the Gilded Age. Through our historic properties, educational programs, and related activities we engage the public in the story of America's vibrant cultural heritage. We seek to inspire and promote an appreciation of the value of preservation to enrich the lives of people everywhere.

## PRESERVATION SOCIETY PROPERTIES

Arnold Burying Ground (1675)

Hunter House (circa 1748)

Kingscote (1839-1841)

Chateau-sur-Mer (1851-1852)

Green Animals Topiary Garden (circa 1860)

Chepstow (1860-1861)

Isaac Bell House (1881-1883)

424 Bellevue Avenue (1887-1888)

Marble House (1888-1892)

The Breakers (1893-1895)

The Breakers Stable & Carriage House (1895)

The Elms (1899-1901)

Rosecliff (1899-1902)

Rovensky Park (1959)

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Mary Murphy, Pat Fernandez, Katherine LaBash, Ryan Kacenski, Kate Bartlett, Robert Bartlett, Megan Kacenski, Monty Burnham, Trudy Coxe



Donald Ross, Brooks Lobkowicz



William Wood Prince, Kathy Irving



Elizabeth & Bill Kahane



Barry Hinckley, Bridget Beer, Molly & Guillaume de Ramel



on our board. They bring integrity, wisdom and visionary foresight to this organization. The depth and breadth of this governing leadership is one of the many strengths bringing long term success to the PS. I'd like to ask all the trustees here today to stand. Their commitment and hard work form part of the foundation of the Preservation Society.

A very encouraging feature of working with the Preservation Society is that, even when people are touring historic houses in declining numbers (and sadly, this is a nationwide phenomenon), our visitation continues to be strong. I am very happy to report that, for the third year in a row, we have provided over one million tours in our houses.

To put this accomplishment into perspective: We first began giving tours at The Breakers in 1948, but it was not until 1965 that we reached a cumulative total of one million tours. It took 17 years to reach a million tours, or slightly under 59,000 tours annually. From 59,000 tours to one million annually is quite a feat!

# Chairman's Report

By Monty Burnham From the Annual Meeting, June 13, 2019



The new exit way from The Breakers

I want to begin by paying tribute to David Leys. David was a board member of the Preservation Society for the past 29 years, as well as a lifelong activist on Aquidneck Island. He brought a smiling face, a hearty laugh and the wonderful gift of common sense to all the organizations he served, whether at Board meetings of the Preservation Society and BankNewport, greeting guests at the Newport Flower Show, or in Washington Square where he watered the planters lining the park while greeting passersby. He was a very special gentleman. I ask for a moment of silence to remember David Leys.

The past year at the Preservation Society has been one filled with excitement, wonder, triumph, adversity and challenges. To meet all of these, we are fortunate to have a very talented group of individuals

What is even more astonishing is the fact that one day in late July this year, some unsuspecting visitor will step into one of our properties and take the forty millionth tour given at the Preservation Society since our founding in 1945. You heard me correctly. Forty million tours!

This achievement is no accident. It is the result of thousands of hours of hard work by our highly trained staff and our wonderful volunteers, cheered on by our loyal members and supporters like you.

And hard work is necessary to create exceptional tours and exhibitions, those that educate and entertain, as well as produce the energy required to care for and maintain 11 historic properties and nearly 90 acres of gardens and landscapes. It is this effort and imagination which makes this organization so special!



David Denmark and Robin Levine Denmark of Cross River, New York were the 40 millionth visitors to the Newport Mansions.

Apart from visitation, this year has seen a number of other accomplishments. Last October, we were re-accredited by the American Alliance of Museums (AAM), the largest museum organization in this country. We were originally accredited in 2004, and that accreditation literally transformed the Preservation Society, changing it from a group of house museums to a museum complex that consistently adheres to the best operational and financial museum practices in the field.

Accreditation is not handed out easily. Of the 30,000 museums nationwide, only about 1,000 are accredited by AAM. We are very proud of our progress thus far and fully intend to meet AAM's always evolving high standards well into the future.

One key aspect of accreditation is how well a museum takes care of its collection of artwork. Last summer we took giant steps forward with the installation at The Breakers of an environmentally-sensitive, state-of-the-art geothermal system. The geothermal system, made up of 75 wells each going down 100 feet, now adequately heats The Breakers in winter and cools it in summer. Most important of all it allows us to maintain a consistent level of humidity, high levels of humidity being the enemy of art collections. The further beauty of the system is that we have reduced our consumption of heating oil by 60%, from 18,506 gallons per annum to 7,485 gallons. For a building as large as The Breakers, this is truly impressive. Our commitment to green technologies also extends, by the way, to Kingscote, Chepstow, Hunter House and the Scholars Center at The Elms.

Lastly, the Preservation Society this year pulled all the preservation pieces together by focusing as much attention on landscapes as we do on our buildings. The largest landscaping project is currently underway at The Breakers.

Planning for the Welcome Center actually served as a catalyst for what will be the most comprehensive (and expensive) landscape project in the Preservation Society's 74-year history. This project covers 13 acres, has a number of components and will be a multi-year effort. When it is complete, landscaping at The Breakers will reflect the design of the original designer, Ernest Bowditch, and will provide visitors with an additional way to enjoy the site.

Currently we are re-doing the exit way from The Breakers to make it as grand and appealing as the entrance. This part of the overall project should be completed in a few weeks' time. We will then initiate work on the rehabilitation of the serpentine path, beginning with the northwest quadrant.

It's been a year of preservation, conservation and education. We've grown our membership, our volunteer force, and our stature as a highly-respected group of historic house museums. I cannot tell you how proud I am of our dedicated professional staff, our volunteers, our board of trustees and all of you, our loyal donors and members. Each of you identifies with this special organization and our mission. I cannot thank you enough.



# CEO & Executive Director's Report

By Trudy Coxe From the Annual Meeting, June 13, 2019

Thank you for being here Mayor Bova and congratulations to this year's outstanding and inspirational award winners.

Last year at this time we were gathered on the lawn of The Breakers celebrating the Welcome Center and giving out these hammers inscribed with the words "We Nailed It!" This year, we can say it again. We nailed it. Even with all the financial and strategic challenges we've faced, we have had a great year.

You've heard about our recent accomplishments. There are a lot of great things set for the year ahead: lectures, exhibitions, new research, new tours, fun events.

What makes 2019 most unique and most challenging, however, is that it's all about hard core preservation: roofs, gutters and windows. Rust, rot, decay and deterioration - all out of sight. In other words, when you look at, say, Rosecliff, everything looks great. But there's more to the story.

We have six important preservation projects ahead of us. What is the biggest problem in historic preservation? Keeping the water out! Of course we've done roofs before. But not three at once.

The Marble House roof will cost more than one million dollars. The Elms roof will cost hundreds of thousands of dollars. The Rosecliff balustrade and roof will cost over one million dollars. In addition, The Breakers windows have not been replaced in 125 years, and need to be repaired as soon as possible.



Celebrating the new landscape along the serpentine path at The Breakers: Trudy Coxe, Diana Prince, Kari & Craig Shapero, Happy van Beuren, Monty Burnham and John Grove



The Elms roof is showing its age, as are the roofs at Rosecliff and Marble House

But it's about more than just keeping the water out. It's also about restoration and rehabilitation.

Like revitalizing the original 1896 landscape at The Breakers at a cost of several millions dollars, and modernizing The Breakers exit way, making the end of the visitor experience as elegant as the beginning, costing \$450,000.

These projects and houses are not only important individually. The Breakers, The Elms, Marble House and Rosecliff provide the financial support that keeps our smaller houses open to the public.

There's a lot happening - especially on top of our roofs - and the good news is that we've raised about two million of the total needed. Many donors are in this room.

In just a few weeks, you'll get a chance to see two of these six projects completed: The Breakers exit way and the first phase of the serpentine path. You all helped make these projects happen so please make a point to visit, give us your feedback, and pass the word on that "we nailed it."

But I don't want to sound too perky. We've got a tricky year ahead balancing all of these large scale, complicated projects. One thing I am certain of - because we're blessed with an outstanding senior management team that gets things done, we'll achieve a lot.

Our entire staff, Monty and our trustees, our volunteers, and you all provide the inspiration to keep us going. There is never a dull day at the Preservation Society. This is a job that is endlessly fascinating and intriguing.

So, 2019 is about preservation. Get ready to learn a lot more about roofs and windows and deterioration. And reincarnation.

All of us here in this room share something. We cherish Newport. You know that sense of relief coming over the Pell Bridge? We all feel it. You know that calm when walking along Cliff Walk? We all get it. Our hearts are full when we drive Bellevue Avenue and Ocean Drive. And we are filled with pride when we take our guests to the Newport Mansions. The beauty of this city is wonderful and the mansions add a dimension that other pretty cities simply don't have.

So, when you support us, you are supporting something big, hard to articulate yet important. Newport because of the mansions is a great city and we must do what the PS has done now for 70 plus years. Protect it. Thank you for doing your part.



# Treasurer's Report

By Peter Harris for William F. Lucey III From the Annual Meeting, June 13, 2019

Good evening. I am delivering the report for our Treasurer, Bill Lucey, who could not be here. FY19, which ended on March 30, was an interesting and challenging year financially. Revenues were down, but so were expenses.

Now, let's get more specific. We have numerous sources of revenue, and when one is down, another is usually up. Last year, most were down, and total revenue was \$1.2 million below budget. Despite that shortfall, we ended the year with a surplus of almost \$600,000, because our total spending was \$1.6 million less than budget.

Trustees and management are clear that we will not spend beyond our resources. So again, for those of you who like numbers, we were cash positive for the year and our financial fundamentals remain solid.

A major bright spot was fundraising, thanks to the many generous donors who are here tonight. To give you an idea:

- The Development office raised over \$6.2 million;
- The Annual Fund engaged nearly 1,000 donors and raised over \$970,000;
- Membership had its strongest year ever membership dues exceeded \$1.2 million from almost 38,000 members.

Thank you all for your continuing support.

Payroll and related expenses such as taxes and health insurance make up 56% of our operating budget. Payroll increased almost \$800,000 over the previous year. That might sound like a budget-buster, but our payroll budget was \$13.9 million and we spent only \$13.1 million, \$800,000 under budget.

We're doing our part in supporting Newport's economy as well as we issued 472 W-2s in 2018, an increase of 17 over 2017.

After six years of delay, we finally opened the Welcome Center last June. While construction costs escalated significantly during that time, we were able to bring the project in on the revised budget, and thanks to the positive response to fundraising, a loan of only \$860,000 was needed to complete construction.

We also began serving light refreshments again, after a six-year hiatus. Now, visitors to The Breakers have the basic amenities they expect from a world-class museum – tickets, toilets and tea!

Our endowment stands at \$42.4 million and provided \$1.8 million in support to the operating budget. Ideally, we would like to have an endowment of \$200 million generating \$10 million a year to maintain our historic properties, which are valued for insurance purposes at one billion.

Until we can achieve that lofty goal, we will do the best we can with what we have.

For the current fiscal year, we budgeted a modest three percent revenue increase, primarily through ticket price adjustments. On the expense side, after our first compensation study in 17 years, we implemented pay adjustments to ensure that our pay is competitive in the marketplace. Prospective employees have many options in today's tight labor market, and we need to offer more than just the benefit of working in beautiful surroundings.

The challenge of maintaining historic structures never ceases. Water is still one of our greatest enemies, and because of that, we have three ongoing roofing projects at The Elms, Marble House and Rosecliff.

Finally, changes underway at The Breakers represent our most significant transformation there in many decades. The grounds and landscaping are being totally rehabilitated.

The list of projects goes on and on and is never ending. That is why it is so vital for us to continually evolve and discover ways to become an even more successful organization.



## Awarded To Marion Oates Charles

Marion Oates Charles, or "Oatsie" as she was affectionately called, will be remembered for a life of charm and style; for her trenchant humor and memorable quips; for her loyalty to the organizations and causes she tirelessly championed; for her twin passions - horticulture and historic preservation; and for the love she showed to her family and friends.

Oatsie was born into a prominent Alabama family on September 29, 1919. In 1952, Oatsie and her husband, Thomas Leiter, bought Edith Wharton's "Land's End," her Newport home overlooking the Atlantic Ocean. She was elated when her daughter and son-in-law, Victoria and Joseph Mele, purchased the home many years later for their use.

Oatsie was the last of America's grandes dames – a legendary hostess and fixture of society in Washington, D.C. and Newport since the 1950s. "Life is a theater. Unfortunately, not everyone knows how to act." Sage observations coming from one who truly had presence, in the grandest sense.

During President Kennedy's administration, Oatsie was a supernova. No others possessed her star power, unusual because hers was achieved on the strength of her personality and honed during her years as a single woman rather than as the wife of an important man.

In 1968, she married Robert H. Charles, an assistant secretary of the Air Force. Invitations to parties in their yellow

house at the top of Georgetown were coveted. She was an unshakable Democrat who welcomed Republicans at her table. To many, she was their muse. After all, she maintained personal friendships with nearly every president from John F. Kennedy to George W. Bush and never accepted an invitation without fully expecting to enjoy herself. Her sangfroid amazed hardened veterans - a hair-raising sail on the Mekong River with the CIA's head of covert operations in 1968 delighted her, returning home with a piece of shrapnel that fell at her feet during a Viet Cong mortar attack.

She poured her attention on the interior decor and gardens of her beloved home, "The Whim," which boasts one of Newport's most spectacular and celebrated waterside gardens, thanks to her vision and passion for horticulture. The Smithsonian Institution's Archives of American Gardens added "The

Whim" to its Garden Club of America Collection in 2012.

Oatsie took community service very seriously, applying her legendary social prowess and intellect to advance causes and organizations she cherished. In her will, Doris Duke named her close friend Oatsie one of only two trustees of the Doris Duke Charitable Foundation, on which she served from 1996

until 2008, when she was named trustee emerita. She served on the Newport Restoration Foundation's board for 37 years, and was a driving force behind the redesign of Queen Anne Square in Newport, spearheading the effort to hire Maya Lin to design The Meeting Room as a public tribute to Doris Duke. She was a trustee of the Redwood Library as well as the Phillips Collection in Washington.



It is her exceptional commitment to Newport as well as to The Preservation Society of Newport County for which we honor Marion Oates Charles. She was a trustee from 1990 to 1996 and a trustee emerita from 1997-2018. She was one of the first to recognize and ardently champion the need to actively protect the 88 acres of historic gardens and landscapes in the care of the Preservation Society. She received the 2005 Laurel Award for "her enthusiastic and active leadership in preservation, restoration and interpretation of Newport's historic landscapes." Oatsie co-founded the Newport Flower Show, which celebrates its 24th year this June.

In gratitude, the Board of Trustees of The Preservation Society of Newport County is honored and pleased to award Marion Oates Charles the Antiquarian Award, our highest organizational honor.

Given at Rosecliff in Newport, Rhode Island

This 13th day of June, 2019

Londy Burnham Fanchon M. Burnham

Chairman, Board of Trustees



# Presented to George H. Warren

The son of Preservation Society founder Katherine U. Warren, George H. Warren's exceptional contributions have extended his family's singular legacy, without whom the architectural heritage of Newport may have been lost.

A Harvard man, architect by profession, unabashed champion of historic preservation and lifelong admirer of Newport and Aquidneck Island, George served 18 years as a member of the Board of Trustees of The Preservation Society of Newport County. First elected in 1977 and retiring in 1995, George served as a trustee, vice chair of the Board, member of the Executive, Planning and Curatorial Committees, and Chairman of the Architectural and Properties Committees.

he co-chaired the Annual Fund with former Board Vice Chair Angela Brown Fischer, raising unprecedented and muchneeded funds.

Former Board Chairman John J. Slocum, Jr. and former Executive Director Toby Pell wrote in the Annual Report dated March 31, 1995, "For many years, we have viewed with dismay the deterioration of the Isaac Bell House on the corner of Bellevue Avenue and Perry Street. Designed by McKim, Mead and White, it is universally regarded as one of their greatest works and one of the half dozen most important examples of 19th century domestic architecture in this country. This shingle style house reflects a unique moment in Newport's and America's architectural history. Upon completion of the historic structure report, it was readily apparent that this magnificent house would fill a void in the Society's architectural collection."

On George H. Warren's birthday this month, he will celebrate a full 99 years and the beginning of his 100th year. This talented and modest man credits his longevity and good health to his wonderful family, life-long curiosity, daily exercise, drives along the Ocean

Drive, where the vistas have inspired him for 99 years, his nightly adult beverage and the occasional cookie.

It is his exceptional commitment to Newport, to historic preservation and to The Preservation Society of Newport County for which we honor George H. Warren. His decades of service, counsel and leadership have markedly advanced our mission to protect, preserve, and present the exceptional collection of house museums and landscapes entrusted to our care in one of the most historically intact cities in America.

In gratitude, the Board of Trustees of The Preservation Society of Newport County is honored and pleased to award George H. Warren the Antiquarian Award, our highest organizational honor.



In August 1994, the Preservation Society purchased the Isaac Bell House, returning to our preservation roots to promote the integrity of a neighborhood rich in architectural diversity. "George Warren was the single most important person - on or off the Board – in our purchase of the Isaac Bell House," declared Mr. Slocum.

Given at Rosecliff in Newport, Rhode Island

This 13th day of June 2019

Monty Burnham
Fanchon M. Burnham

Chairman, Board of Trustees



# Presented to Comte Denis de Kergorlay

For his exceptional efforts in safeguarding the cultural and natural heritage of the nations of the European continent within a spirit of cooperation and collaboration.

The International Preservation Award acknowledges the extraordinary efforts undertaken by individuals and/or institutions from around the world to safeguard and preserve culturally significant properties. This distinction is awarded to those whose preservation efforts and actions evoke a sense of passion and inspiration in others.

As a preservation leader of the first magnitude, Comte Denis de Kergorlay has devoted a major portion of his life working tirelessly for meaningful change in how European cultural and natural heritage is perceived and how it is preserved and protected for present and future generations.

As Executive President of Europa Nostra, Europe's leading citizens' movement for the safeguarding of the Continent's cultural and natural heritage for 10 years, Denis provided critical leadership intended to break through barriers and lay the groundwork for Europa Nostra's becoming a powerful voice and a significant influence within the European preservation movement. One example of Europa Nostra's impact across nearly 50 countries was the establishment of "the seven most endangered" program. Monuments and sites under stress are evaluated and the most endangered are selected for rescue missions. Europa Nostra serves as a catalyst, encouraging a call to action by public and private organizations. It is this collaborative approach skillfully guided by Europa Nostra that is most effective in resolving the complex and often expensive preservation issues surrounding these endangered monuments and sites.

In honor of Denis' exceptional commitment to historic preservation and devotion to his beloved France, the Preservation Society made a contribution to the restoration of Notre Dame Cathedral.

As President of the French Heritage Society, Comte Denis de Kergorlay has worked tirelessly to strengthen the everlasting bonds of friendship and mutual respect that exist between France and the United States. The French Heritage Society does this by promoting the preservation of French architectural and cultural heritage.

One of the most important attributes of the work accomplished by the French Heritage Society is the cross cultural exchanges that take place each year. The Preservation Society has benefited from hosting French men and women here in Newport each summer. The goodwill generated helps to weave the fabric of history binding our two nations.

Denis has a very personal relationship with preservation as he is responsible for his family's ancestral home of one thousand years, the Chateau de Canisy, a beautifully maintained chateau and 800 acres of tranquil land in Normandy, France.

Denis serves as President of the Cercle de I'Union Interalliee in Paris, one of France's most historic cultural clubs dating back more than a century, whose membership includes a litany of political and cultural leaders and whose membership is international.

Denis is an old world gentleman who goes about his work with diplomacy, grace and dignity. It is with great honor that we present Comte Denis de Kergorlay with the International Preservation Award.

Given at Rosecliff in Newport, Rhode Island

bonty Burnham

This 13th day of June, 2019

Fanchon M. Burnham

Chairman, Board of Trustees

# Presented in recognition of outstanding service, artisanship or leadership



## **Island Moving Company** for Artisanship

In recognition of your dedication to and excellence in classically trained contemporary ballet dance performances which benefit local and national audiences through educational and engaging experiences.

Trustee Steven Gewirz, Miki Ohlsen and Martha Parker of IMC, Monty Burnham



## Lilly Dick for Horticulture

In recognition of your dedication to Newport's horticultural legacy through your efforts with the Newport Tree Conservancy and the many other civic and environmental causes you promote, all of which benefit our community in the present and ensure its future.

Trustee David Ford, Lilly Dick, Monty Burnham



## The Honorable Stephen M. Casey and Debra Hunt for Volunteerism

In recognition of your volunteer efforts to protect the gardens and landscapes of Newport, bettering the natural beauty of our island community.

Trustee Bill Hatfield, Debra Hunt, Stephen Casey, Monty Burnham

# **Donors**

## April 1, 2018 - August 31, 2019

The Preservation Society of Newport County thanks our many members and individual, foundation and corporate donors for your ongoing generosity. Your support makes it possible for us to protect, preserve and present the exceptional collection of house museums and landscapes entrusted to our care.

#### INDIVIDUAL GIFTS

#### \$100,000 and above

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THE 28TH ANNUAL NEWPORT SYMPOSIUM

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