We acknowledge that Filoli is located on the unceded ancestral homeland of the Ramaytush Ohlone people who are the original inhabitants of the San Francisco Peninsula.
Our Mission

To connect our rich history with a vibrant future through beauty, nature, and shared stories.

Our Vision

We envision a time when all people honor nature, value unique experiences, and appreciate beauty in everyday life.

“We continue moving forward to make Filoli the best version of itself. I look forward to having you “Meet me at Filoli!”

– Carol Moran
2022 Board President

“My goal was to make Filoli a household word. This year, attendance doubled as new visitors brought fresh ideas.”

– David Wollenberg
2021 Board President

“In 2021, we partnered with cultural organizations to bring new audiences to Filoli. Great things happen when people from diverse backgrounds work together.”

– Kara Newport
Filoli CEO

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Leadership

Kara Newport
Chief Executive Officer

Chris Hirano
Chief Development Officer

Alex Fernandez
Chief Operations Officer

Ayako Fukudome
Chief Financial Officer

Brittany Jones
Chief Experience Officer

Susan O’Sullivan
Chief External Relations Officer

2021 BOARD OF DIRECTORS

David A. Wollenberg
President

Carolyn Daley
Past President

Carol Moran
Vice President

Chris Hirano
Chief Development Officer

Ayako Fukudome
Chief Financial Officer

Susan O’Sullivan
Chief External Relations Officer

2022 Incoming Board Members

Maryles Casto

Mani Ramasamy

Sydney Leung

Karyl Matsumoto

2022 Incoming Board Members
Strategic Plan Goals

FUNDRAISING & FINANCIAL STRENGTH

- Doubled attendance
- Increased revenue by 75% and membership by 60%

PEOPLE & CULTURE

- Adopted living wage policy, raising minimum wage to $28
- Doubled minority representation on its Board

INFRASTRUCTURE INVESTMENTS

- Completed House floor restoration
- Implemented new water conservation and sustainability practices

VISIBILITY & BRANDING

- Partnered with Chen Design Associates to create a fresh brand
- Welcomed more diverse audiences and over 1.4M website visits

LEARNING & ENGAGEMENT

- Piloted a new preschool partner program
- Developed new interpretations and narratives reflecting the property's diverse history beyond the Bourns and Roths
AAM ACCREDITATION

The American Alliance of Museums accredited Filoli, making it one of 77 recognized museums in California. Accreditation marks a museum’s commitment to high standards and continued improvement.

FACING CHANGE

The American Alliance of Museums selected Filoli to participate in “Facing Change,” a national initiative to increase racial and ethnic diversity on museum boards. As a result, Filoli doubled minority representation on its Board.

45.6% of visitors traveled over 20 miles to visit Filoli

45.5% of visitors are between the ages of 18 and 44 years old

31.2% of visitors have children under 18 years

Ethnic Makeup

42.6% Caucasian/White

31.0% Asian

17.9% Hispanic/Latinx

5.1% Other

3.3% Black
## FINANCIALS

### STATEMENT OF ACTIVITIES

**Years ended December 31**

<table>
<thead>
<tr>
<th>Revenue and Support</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs</td>
<td>$5,967,945</td>
<td>$2,769,672</td>
</tr>
<tr>
<td>Memberships</td>
<td>$1,845,321</td>
<td>$1,273,611</td>
</tr>
<tr>
<td>Contributions and grants</td>
<td>$1,289,065</td>
<td>$894,326</td>
</tr>
<tr>
<td>Retail gift shop sales (net)</td>
<td>$1,249,528</td>
<td>$643,444</td>
</tr>
<tr>
<td>NTHP Endowment</td>
<td>$603,981</td>
<td>$588,191</td>
</tr>
<tr>
<td>Other income</td>
<td>$163,848</td>
<td>$201,261</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$11,119,688</td>
<td>$6,370,505</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td>$6,776,731</td>
<td>$5,009,289</td>
</tr>
<tr>
<td>Management and general</td>
<td>$1,314,532</td>
<td>$1,062,052</td>
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<tr>
<td>Fundraising</td>
<td>$922,217</td>
<td>$529,906</td>
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<tr>
<td><strong>Total</strong></td>
<td>$9,013,480</td>
<td>$6,601,247</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Changes in Net Assets</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$795,558</td>
<td>$1,350,141</td>
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</tbody>
</table>

### STATEMENT OF FINANCIAL POSITION

**Years ended December 31**

<table>
<thead>
<tr>
<th>Assets</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$7,187,049</td>
<td>$3,929,409</td>
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<tr>
<td>Receivables (net of discount)</td>
<td>$104,394</td>
<td>$103,167</td>
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<tr>
<td>Prepaid Expenses</td>
<td>$286,201</td>
<td>$208,101</td>
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<tr>
<td>Inventory</td>
<td>$170,603</td>
<td>$284,105</td>
</tr>
<tr>
<td>Investments</td>
<td>$12,686,940</td>
<td>$11,958,576</td>
</tr>
<tr>
<td>Property and Equipment (net)</td>
<td>$5,101,043</td>
<td>$5,559,598</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$25,536,430</td>
<td>$22,042,956</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities and Net Assets</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Liabilities</td>
<td>$1,753,295</td>
<td>$1,161,587</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>$23,783,135</td>
<td>$20,881,369</td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td>$25,536,430</td>
<td>$22,042,956</td>
</tr>
</tbody>
</table>

**Revenue and Support:**
- Programs: 15%
- Memberships: 12%
- Contributions and Grants: 11%
- Retail gift shop sales: 75%
- NTHP Endowment: 10%

**Expenses:**
- Program services: 75%
- Management and general: 15%
- Fundraising: 54%
- Other Income: 17%
- Memberships: 1%

---

Audit in process. Complete in May 2022.
VISITATION

Annual

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>300,000</td>
<td>350,000</td>
<td>400,000</td>
<td>500,000</td>
<td>600,000</td>
<td>700,000</td>
</tr>
</tbody>
</table>

Monthly

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>10,000</td>
<td>11,500</td>
<td>13,500</td>
<td>15,500</td>
<td>17,500</td>
</tr>
</tbody>
</table>

MEMBERSHIP

Monthly

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>9,500</td>
<td>10,500</td>
<td>11,500</td>
<td>12,500</td>
<td>13,500</td>
</tr>
</tbody>
</table>
The American Public Gardens Association collects information on all members to show ideal fundraising, attendance, and staffing levels. Filoli is on the way to becoming a Top 20 Public Garden in the United States.

Chen Design Associates created a brand to match Filoli’s historic past and inclusive, modern sensibility. The new stemkey logo symbolizes growth, with buds and leaves coming forth from the main “F” stem. It communicates the idea that something new is emerging from history, giving access to all that Filoli offers. The new brand highlights our goal to ensure Filoli is accessible to all visitors hoping to find inspiration in every season.
Diversity & Inclusivity

DEAI STATEMENT
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 your fellow man, live a good life.

PARTNERSHIPS
• On Indigenous Peoples’ Day, Filoli celebrated the creativity of the Bay Area’s contemporary Indigenous cultures. Community members shared their poetry, artwork, history, and food.

EVENTS
• Visitors enjoyed a Rainbow Walk on the Estate Trail, a floral takeover by Nigella, and a soundscape on the Garden House Lawn during Filoli’s annual Pride celebration.
• Celebrations at Filoli spotlight cultural holidays from our diverse community.

LIVING WAGE
• Filoli’s Board of Directors approved a new compensation structure based on MIT’s Living Wage calculator, raising the minimum hourly salary from $19 to $28.

USER-GENERATED CONTENT
• Filoli engaged visitors to share their experiences on social media and help populate our website and materials with first-hand Filoli images and stories.

YOUTH PROGRAMS
• Filoli launched a preschool program with the Chinatown Community Children’s Center and Peninsula Family Service introducing students to the natural lands and environmental education.

EXHIBITS
• Stories of Resilience featured stories of the individuals and identity groups who overcame injustices or were historically excluded from performing at or working at Filoli.

Visitors enjoyed a Rainbow Walk on the Estate Trail, a floral takeover by Nigella, and a soundscape on the Garden House Lawn during Filoli’s annual Pride celebration. Celebrations at Filoli spotlight cultural holidays from our diverse community.
To remain a vibrant sanctuary for the next hundred years, Filoli is creating a Master Plan to strategize for growth, improve infrastructure, expand narratives, and integrate climate resilience and sustainability into all practices. Professional partners include Nelson Byrd Woltz and Architectural Resources Group. Filoli plans to finalize the Master Plan in fall 2022.

Filoli fostered its own climate resilience by adapting land management, plant selection, and irrigation practices to meet the moment. Brush-clearing projects protect Filoli and its neighbors from wildfires. In the Garden, we revamped Filoli’s historic plant palette to reduce turf and increase drought-tolerant plants. A new drip irrigation system and updated spray nozzles reduce water use by 30 percent and decrease plant disease.

Filoli’s Fruitful Garden exhibit highlighted the gifts of edible, medicinal, and pollinator plants. “Edible Garden” showcased the relationship between beauty and utility, with sweet potatoes growing alongside dahlias. All produce went to local nonprofit Village Harvest. Pollinator-friendly plants in the summer garden highlighted the important relationship between plants and pollinators. Filoli’s “Medicinal Garden” covered ancient and modern uses of plants for healing.
Preservation Projects

FLOOR REFINISHING

We used the House closure during the COVID-19 pandemic to complete the projects we couldn’t do while open to the public. In March, we refinished key thoroughfares of the House to match the original flooring color.

GENTLEMEN’S LOUNGE

The Gentlemen’s Lounge project transformed the trophy room into the masculine games room of the Bourn Era. Donations like the pool table and card table return the room to the period. The donation of a Tiffany lamp means even the lighting is similar to what Mr. Bourn experienced.

NEW ACQUISITIONS

This bronze Ikebana suiban, sold at auction when Lurline Roth gave Filoli to the National Trust in 1975, returned to Filoli in 2021. After a visitor learned the piece in her collection had once called Filoli home, she decided to donate the vessel.
Events

HOLIDAYS AT FILOLI

*Holidays at Filoli* welcomed a record-breaking 76,000 visitors. Installations included a Yew Tree Rainbow and a river of lights.

GALA IN THE GARDEN

Supporters enjoyed the Filoli Garden at the 2021 annual Gala and raised funds for the Ballroom Terrace project.

SUMMER NIGHTS

Visitors strolled the Garden and watched the sun set during Filoli’s Summer Nights.

ORCHARD DAYS

We opened the Gentleman’s Orchard during the fall so Filoli visitors could explore the rows of apple trees and grapevines while learning about food production, listening to live music, and meeting with local artists.
Filoli’s community of supporters keeps Filoli open and accessible for sanctuary and inspiration. 2021 was a record year for donations, listed below. Please contact development@filoli.org with any questions.
The Vegetable Garden is a vital part of the San Francisco Municipal Garden system. Upgrades to irrigation, landscaping, and the greenhouse have been supported by donations, including those from:

- Gordon and Darin Hamlin
- Brian and Kathy Hiers
- Bill & Anne McCloskey
- John & Renee McCloskey
- Mark & Karen McDonald
- Stephen & Michelle McGovern
- Chris & Theresa McNeely
- John & Helen Mendel
- Scott & Christine McKeehan
- Jim & Joanne McCreery
- Peter & Dorothy McCreery
- Mark & Lisa McCreery
- C. Maziarz & Carol McLaren
- John & Dana McFerrin
- David & Shana Middlebrook
- Paul & Vicki Yu
- Betty & Don Shippert
- Kim James Lammersen
- John Kennedy
- Beryl & Harry Robbins

The Vegetable Garden is permitted under the terms of the San Francisco Grounds and Landscaping Ordinance. The Garden provides a year-round source of fresh produce for the community. Donations are encouraged to support its operations. For more information, visit veggiegarden.org.
Grande Ronde & Vancouver, WA:

Battling the historic fountain. Scheduled for completion Fall 2022.
We created a new preschool program with training by the International Coalition of Sites of Conscience and grant funding from the Institute of Museum and Library Services. We first connected with Peninsula Family Service, and when a generous donor matched the original grant which doubled program capacity, new board member Sydney Leung introduced us to the Chinatown Community Center's Childcare Program.

GALA IN THE GARDEN SPONSORS

Individual Sponsors
Jennifer & Brian Beswick
Donna & Eric Colson
Carolyn & C. J. Daley
Mary & Kevin White
Molly & Marc Modrow
Robyn & John Fleet
Barb & Ron Peyton
Laura & Richard Simonds
David A. Wollenberg

In Kind Sponsors
Melons Catering & Events
Bright Event Rentals
Gratus Vineyards
Moran Manor
Melons Catering & Events

HOLIDAYS OPENING NIGHT SPONSORS
Presenting Sponsor
Head & Hand LLP

Supporting Sponsors
Tina Caratan
Brad Parberry
David A. Wollenberg
Philippe & Coken
Saglimbeni
Mary & Kevin White

Table Sponsors
Michele & Amy Boochart
Donna & Eric Colson
Gene & Trish Cook
Carolyn & C. J. Daley
Michael Doerriger & Natalie Mihalek
Mary & Gary George
Barb & Ron Peyton
Winn & Win Stop
Leslie Witt & Ian Smith
Lorraine Tan
Gay & Walt Wood
Sophia Yen & Steve Ko

In Memor of Nancy Strauss
Jean Boone
In Memory of Liz Watson
Karen Schnekheit
In Memory of Cathie Cross
Madeline Cronin
Sandra Steecker

In Honor of Jim Salyards
Lauretta Cesario
Joanna Deyer
Sandra Patterson

In Honor of Jim Salyards
Lauretta Cesario
Joanna Deyer
Sandra Patterson

In Recognition of
Sandra Stoecker

In Memory of
Karen Schoknecht

Jean Boone

board member Sydney Leung introduced us to the Chinatown Community Center’s Childcare Program.

LEGACY SOCIETY

The Shirley Altbright Trust
Berenice & Lawrence Brackett
Roy & Mark Chambers-Bray
Donna & Eric Colson
Michael Inden Living Trust
Lila & Erwin 1990 Trust
Olivier P.McComas, Jr.
Chambers-Bray Unitrust
Glenda & Tom Murray
Estate of Robert J. Prevaux
Renee Robillard
Steplon & Lupe Back
David A. Wollenberg
Elizabeth Wright

Sandra Patterson

Lauretta Cesario

In Honor of Jim Salyards

Annicka Aricola

In Recognition of
Sandra Stoecker

In Memory of
Karen Schoknecht

Jean Boone

In Memor of
Nancy Strauss
Jean Boone

In Memory of Liz Watson
Karen Schnekheit

In Memor of
Cathie Cross
Madeline Cronin
Sandra Steecker

In Honor of Jim Salyards
Lauretta Cesario
Joanna Deyer
Sandra Patterson

In Honor of Jim Salyards
Lauretta Cesario
Joanna Deyer
Sandra Patterson

In Recognition of
Sandra Stoecker

In Memory of
Karen Schoknecht

Jean Boone

In Memor of
Nancy Strauss
Jean Boone

In Memory of Liz Watson
Karen Schnekheit

In Memor of
Cathie Cross
Madeline Cronin
Sandra Steecker
Ways to Give

SPECIAL PROJECTS

- Repaving the Ballroom Terrace makes it more accessible and opens it for events.
- Reopening the Vegetable Garden creates a hands-on learning space for visitors. To match its original state, the Dining Room needs renovation, with updates including silk restoration, art acquisition, and infrastructure modernization.

LEGACY SOCIETY

- The Legacy Society preserves and enhances the Filoli estate for the next century. Donors receive immediate benefits from planned gifts and leave a gift investing in Filoli’s future.

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.

FILOLI CIRCLE

- Circle membership represents strong engagement with Filoli’s mission, vision, and programs. Benefits include concierge services, access to special events, and extra discounts. Memberships are 100% tax deductible.

GALA IN THE GARDEN

- Join us for cocktails, dinner, and entertainment in Filoli’s formal Garden. The annual Gala is an opportunity to invest in Filoli’s mission. A portion of every table sponsorship and ticket is a tax-deductible donation to Filoli.
Filoli was named for William Bowers Bourn’s credo:

*Fight for a just cause*
*Love your fellow man*
*Live a good life*