

# Simple Gifts

# **INSPIRING DISCOVERY**

# 2021 Annual Report

# The Campaign for Shaker Village Surpasses \$25 Million Goal!

Preserving the legacy of the Pleasant Hill Shakers is no easy task. As the country's largest private collection of original 19th century buildings it takes constant maintenance and funding to keep the Village in top order. It's a mission that the staff, Board of Trustees and thousands of Village supporters are passionate about.

In 2014, the Shaker Village Board of Trustees launched a multi-faceted campaign to raise \$25 million with the goal of transforming Shaker Village into Kentucky's premier landmark travel destination. The vision was to make Shaker Village a "destination of choice" for generations of guests who would be inspired by the legacy of the Shakers.

Realizing this ambitious vision has required significant resources to address the non-profit organization's preservation, conservation and educational needs in a financially sustainable manner. Shaker Village is supported by guest revenue, public and private funding sources and an endowment.

As of March 1, 2022, the Campaign for Shaker Village has exceeded the original goal and raised \$25.2 million in new funds for the preservation of Shaker Village's unique and powerful cultural landscape.

Shaker Village is deeply grateful for the generous support of its donors, the leadership of its Board of Trustees and the hard work of its dedicated staff. A full list of donors to the Campaign for



Shaker Village is included in this report. The steadfast and gracious leadership of Campaign Co-Chairs Ellen Chapman and Watts Humphrey has been instrumental to the Campaign's success. Campaign committee members have also given generously of their time and talent.

A special thank you is also owed to the current and former staff members who have worked hard to make the Campaign for Shaker Village successful, especially the dedication and leadership of Campaign Director, Margaret Graves and the Development team.

# **MILESTONES ACHIEVED**

\$5.1 Million Gift from the Lilly Endowment
After a successful site visit and conversations with
Shaker Village President and CEO, Maynard
Crossland, Shaker Village submitted a \$5
million proposal to Lilly Endowment, Inc. This

grant application for the restoration of the 1824 Centre Family Dwelling and the 1820 Meeting House was approved. In December of 2015, Lilly Endowment, Inc. awarded Shaker Village more than \$5.1 million to restore these two iconic structures and provide programing support.

# \$6 Million Endowment Challenge – Building a Strong Financial Foundation

In late 2014, a longtime donor offered a \$2 million matching endowment challenge with the goal of raising \$6 million in restricted endowment funds for Shaker Village. The endowment challenge was met in December, 2017, with more than \$6.2 million being raised for Shaker Village's endowment. Restricted endowment funds currently total more than \$10 million and provide critical support to Shaker Village's ongoing operations.

### Community Development Block Grant

In August, 2015, Shaker Village was awarded a \$400,000 Community

# The Campaign for Shaker Village Continued...

Development Block Grant from the U.S. Department of Housing and Urban Development, the Kentucky Department of Local Government and the Mercer County Fiscal Court. The funds were used in the restoration of the 1824 Centre Family Dwelling and 1820 Meeting House.

### James Graham Brown Foundation Grant

In June, 2016, Shaker Village received a grant of \$500,000 from the James Graham Brown Foundation, Inc. for the *Shaker Modern: Revitalizing the Spiritual Center* project. This funding paid for the restoration of the 1815 Carpenters' Shop and the development of new media educational enhancements. The Carpenters' Shop reopened as the Welcome Center in August, 2017.

### \$10 Million Tirbracken Green Foundation, Inc.

In December, 2016, Ms. Nana Lampton, a former Shaker Village Trustee, proposed to establish a Type I supporting organization under applicable IRS rules to benefit both Shaker Village and Berea College. Contributions made to Shaker Village from the Tirbracken Green Foundation are to be used "exclusively to support the preservation, conservation, management, expansion and continued sustainability of the land, plants and forest owned and operated by Shakertown at Pleasant Hill Kentucky, Inc." These funds provide ongoing support for the 2,000 acre Preserve at Shaker Village.





### 1833 Water House Project

In 2017-2018, the 1833 Water House was restored with funds donated by the Carruth, Lee, Walker and Schubert families. The Water House demonstrates the ingenuity of the Pleasant Hill Shakers who developed the first public water works west of the Allegheny Mountains.

### 1817 East Family Dwelling

In December 2019, Shaker Village received a generous pledge of \$750,000 from Henry Heuser through the Louisville Community Foundation for the restoration of the East Family Dwelling. This preservation project is currently ongoing and encompasses roofing, masonry, carpentry and drainage projects.

### The National Endowment for the Humanities

In June, 2020, Shaker Village received its first grant from the National Endowment for Humanities for \$95,952 for use in digitizing its archival collections for greater public use and ease of access for researchers and scholars. You can now access the collections by visiting shakervillageky.org/collectionsandarchives.

### The Institute for Museum & Library Services

In July, 2020, Shaker Village received a matching grant of \$130,000 from the Institute of Museum and Library Services to support the planning, development, fabrication and installation of an exhibit titled *Local Economies, Global Impacts*. Matching funds for this grant came from two individual donors as well as funds from the J. Cogar Furniture Fund. The

exhibit opened permanently this March and spans three rooms in two historic buildings. Visitors will discover the fascinating story of Shaker ingenuity, manufacturing and marketing through personal stories, interactives and rarely seen artifacts.

### 60th Anniversary

In 2021, the Village celebrated the 60th anniversary of becoming a non-profit organization. What started in the 1960's as an ambitious vision to preserve the legacy of the Pleasant Hill Shakers has grown into a 3,000-acre site with 34 historic buildings, a full-time inn, seed-to-table restaurant, a museum collection of more than 5,000 archives and a diverse array of educational programs for all ages.



Growing the endowment for the future of Shaker Village was a campaign priority in 2021. In July, 2021, the Board approved the establishment of a restricted endowment fund for historic building preservation. Two new Endow Kentucky funds were established at local community foundations: The Blue Grass Community Foundation and the Community Foundation of Louisville. By 2022, Shaker Village had successfully raised an additional \$1 million for the endowment.

The Campaign for Shaker Village has been transformative in shaping a brighter future for Shaker Village of Pleasant Hill. We are grateful for the support we received to exceed this monumental campaign goal. We hope you will continue to make Shaker Village your destination of choice.

# Growing the Annual Fund

# 58% Earned Revenue Gifts

How Shaker Village Pays the Bills



During the same time the Village pursued the ambitious goal of raising \$25 million for the Campaign for Shaker Village, the organization also sought to substantially increase annual unrestricted giving and expand the Development department. The Annual Fund is one of the most important components within our fundraising program. It supports the preservation of the Village, educational programming, exhibits and an improved guest experience across 3,000 acres and living history.

In addition, the Development team supports capital needs for specific projects including building restoration, the Preserve and the Farm.

The Shaker Village Annual Fund has successfully raised \$1 million or more for the past three fiscal years and now has more than 1,000 donors. In fiscal year 2021-2022 the Development team, the Board of Trustees and generous donors raised more than \$2 million to benefit Shaker Village.

# **Planned Giving**

In 2018, Shaker Village established The William Pennebaker Planned Giving Society. As one of the last remaining Shakers, Dr. Pennebaker arrived as an orphan at Pleasant Hill and made it his home for 73 years. The society offers donors a valuable opportunity to leave a legacy furthering Shaker Village while receiving significant tax benefits. To date, 16 donors have joined the society and have Shaker Village as a beneficiary in their estate plans.

Board of Trustees' member Jane Winegardner said, "I have included Shaker Village of Pleasant Hill in my estate planning as I want this Kentucky treasure to continue enriching future generations."

Our Development Team would love to give you more details. Please reach out at 859.734.1563.



# **Annual Passholder Program Expands**

During the past fiscal year, the Annual Passholder Program has experienced tremendous growth with more than 200 new members! Currently there are 1,360 active annual passes, providing benefits to more than 3,600 members. Individuals, couples, families, seniors, active military and first responders all receive free admission to Shaker Village, unlimited rides on the Riverboat and complimentary attendance at signature events. Additional benefits to passholders include discounts on overnight rooms, meals at the Trustee's Table and purchases in the Shops. Plus, there are 36 miles of multi-use trails to enjoy.

Passholder-exclusive events and additional discounts are spread throughout the year and Village-wide discounts are now available for Equestrian passholders. The passholder fees help to support educational opportunities and historic preservation throughout the Village.

Michael Potapov, a longtime Annual Passholder shared, "The program makes it easy for my wife Nancy and I to support Shaker Village. We enjoy the property all year long. They offer great discounts on food, rooms and the Shops. We especially enjoy the Fresh Farm Adventures and special events."

# Meet Your Development Team

We rely on the generous gifts of our friends, guests and donors to keep Shaker Village thriving!

Thank you for supporting Shaker Village!





Barry Stumbo Chief Development Officer



Melissa Donahoo Development Coordinator



Shannon Timmons Development Specialist

### SHAKER VILLAGE CAMPAIGN DONORS

The Campaign for Shaker Village has raised \$25 Million in funds for the preservation of Shaker Village's unique cultural landscape for the benefit of future generations. We are deeply grateful for the generous support of our donors listed below.



# Trailblazers \$5 Million & more

The Lilly Endowment Tirbracken Green Foundation, Inc.



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# 2022 **Upcoming Events**

May

27-29 Chamber Music Festival

June

18 Vintage Dad's Day

July

4-10 Mercer County Week

**August** 

6-7 Craft Fair

September

17-18 Kentucky Heritage Jazz Festival 24-25 Harvest Fest

October

21-22 Trick-or-Treat 29 Boo Cruise

November

12 Quail Dinner 26 Blessing of the Hounds

December

3, 10, & 17 Illuminated Evenings 3, 10, & 17 Tea Time with Mrs. Claus

Visit

shakervillageky.org/event-calendar for more details.







Shaker Village of Pleasant Hill 3501 Lexington Road Harrodsburg, KY 40330 shakervillageky.org 859.734.5411

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# **New Permanent Exhibit Opens**

**Local Economies, Global Impacts** made its debut at the Village in March. The exhibit showcases how the Shakers' communal structure supported the local production of brooms, textiles, seeds and more as well as how these products connected this small community to a much larger world.

This groundbreaking exhibition represents a bold step in Shaker Village's sitewide interpretive plan. According to Shaker Village Vice President of Public Programming and Marketing Billy Rankin, "The opening of this exhibition is the culmination of two years of new research and interpretive planning. The exhibit is unlike anything our guests have seen here before."

The exhibit was funded by a grant from the Institute of Museum and Library Services and private donations. Guests can visit the exhibit daily with the purchase of an admission ticket.

