ANNUAL REPORT

HISTORIC SOUTHWEST OHIO

ANNUAL REPORT 2022

HERITAGEVILLAGECINCINNATI.ORG
513-563-9484
Greetings and Thank You!

2022 was a year of change and transition for Heritage Village Museum, starting with the promotion of Steve Preston to Executive Director. Steve's experience with the village enabled us to smoothly transition into new leadership. We also welcomed Lauren Woods as our new Education Director. Lauren brings such enthusiasm to everything she does! It is exciting to see our education programs back to capacity and new kids club programs to engage potential junior volunteers.

Speaking of volunteers - THANK YOU!! All of you that volunteer are essential to the success of Heritage Village programs and events. Bethany works diligently to engage all of you. I hope you are as excited as I am for the learning opportunities she’s enabled. Being able to demonstrate daily life activities is a big part of bringing history alive.

We have seen transition in our buildings and grounds too. Most noticeable is the reopening of Dr. Langdon's office and the new roof on Elk Lick. Our capital funding efforts are continuous so as to keep up with the needs for each building. Your generous donations, for both operating expenses and capital projects, are much appreciated and I wholeheartedly thank you for enabling Heritage Village Museum to maintain and grow.

Looking forward into 2023, the roof project at Chester Park is underway, bids are being secured for the roof/bell tower on the Myer Schoolhouse, and plans are forming to create a Trades Shop (blacksmith/tinsmith).

I encourage you to engage with our staff and volunteers around the village to enjoy the many programs and ambience our village offers to everyone. Invite your friends and family for an afternoon! I hope to see many of you during our 2023 season.

And, if I have not said this enough – THANK YOU – for your time, talents and financial donations.

Michele K. McDonel
HSO Board President
OUR MEMBERS AND OTHER INDIVIDUALS HAVE SUPPORTED US FINANCIALLY. WE WOULD LIKE TO RECOGNIZE OUR DONORS DURING 2022.

$1-$99
- Brewing Heritage Trail
- Susan Bacevich
- Dewey’s Pizza
- Bill Dichtl
- Louisville Slugger Museum

$100-$249
- Cheri Brinkman
- Catharine & Raymond Buckler
- Marti Buente
- Linda Busken Jergens
- Dave & Buster’s
- Chick-fil-A
- Shirley and Ed Clancy
- Marjorie Davis
- William and Monika Gregory
- Joyce Hackbarth
- Jan Hale
- Bob Houston
- Hug Jewelers
- Heather Jones
- Kroger
- Ladies Living History
- Joe Lander
- Kim Lucas
- Eric and Michele McDonel
- Larry Phillips
- Yvonne Reissig
- Michael and MaryPat Schmidt

$250-$499
- Chevron
- Frame USA
- GE Foundation
- Heritage Village Quilters
- Bethany and Victor Jewell
- Jerry & Sonya Kirkland
- KJE Acquisition Group
- Mary Lippert
- Kathy Luhn
- Joyce and Steven Mueller
- Queen City Racquet Club
- Rockquest Climbing Center
- Julia and John Sandman
- Snooty Fox

$500-$999
- Mary F. Allardyce
- BMW
- David Brooks
- Continental Mineral
- Pat Danneman
- Ashley Ford
- Gary & Nancy Jewell
- Robert Kroeger
- Robert Martsof
- Carolyn Nightingale
- Wayne Purintun
- Seasons
- Douglas Swanson
- Lauren and Garrett Woods

$1,000-$2,499
- Fidelity Charitable Donor
- Advised Fund
- Barry Adamson
- Colonial Wars Society
- Rob and Lynne Carter
- Steve McManus
- Thunderdome Restaurant Group
- Williams Charitable Account

$2,500-$4,999
- Ann Swanson
- 5/3 Bank

$10,000-$24,999
- Becky Linhardt
- Marshall Tucker
- Frank and Mike Davis

$30,000-$49,999
- Mark and Marilyn Meckes

IN THE TRANSITION YEAR, WE WORKED ON A NEW SYSTEM OF TRACKING DONORS. PLEASE LET US KNOW IF ANYTHING WAS MISSED OR MISCATEGORIZED.
In 2022 we applied to 4 foundations and organizations for financial support to undertake maintenance projects, create new exhibits, support programs, payroll, and education programs for school visits. The grants applied for totaled $32,500. We received 100% of the funding requested. We received another $62,536 from continuous giving from individuals and organizations.

<table>
<thead>
<tr>
<th>Foundations/Organizations</th>
<th>Project</th>
<th>Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kersten Fund</td>
<td>Operating expenses and salaries</td>
<td>$59,536.00</td>
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<tr>
<td>Dater Foundation</td>
<td>Education salaries, supplies, and to bring underserved schools to the Village</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Robert Gould Foundation</td>
<td>Education salaries and supplies</td>
<td>$10,000.00</td>
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<tr>
<td>Ohio Humanities</td>
<td>19th Century Skills Videos</td>
<td>$1,500.00</td>
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<tr>
<td>Dayton Foundation</td>
<td>Operating expenses</td>
<td>$1,000.00</td>
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<tr>
<td>Kennedy Charitable Trust</td>
<td>Operating expenses</td>
<td>$1,000.00</td>
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<tr>
<td>The Oliver Family Foundation</td>
<td>First Person Programs</td>
<td>$1,000.00</td>
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<tr>
<td>Ridgeway Foundation</td>
<td>Operating expenses</td>
<td>$1,000.00</td>
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The growth of our institution will provide a financial platform to expand our reach and footprint beyond Southwest Ohio. That has already begun. Heritage Village is entering the final stages of completion of the Myer Schoolhouse, with a projected finish date in 2024. We are excited to possibly open our school as students go back to school in the fall of 2024. This will provide another option for programming and serve as an example of life in late 19th century Cincinnati.

Development has begun on the creation of a trades location consisting of a working tinsmith and blacksmith shop. Adding this to our “business district” will enhance our representation of 19th century commerce and provide for the creation of merchandise for our gift shop.

Growth has also begun with new programming such as Spirits by Starlight, Behind the Scenes tours, and Volunteer Workshops. New programming is scheduled this summer with a Senior Fair, benefiting the community, and the Victorian Barroom, a sampling of 19th century libations.

Growth in sponsorships and partnerships is occurring with Seasons Retirement Community taking the step to sponsor ANFTM, the Senior Fair, and other events. The Senior Fair has also added new sponsors to the village. Comey and Shepard Realtors, Medical House Calls, Caring Transitions, and Devoted Health are now counted as sponsors. Our partnership with the Myaamia Center of Miami University has blossomed to include Native plantings and signage to come to the Kemper Kitchen Garden and labels on Native trees in the village. Our growth individual donors is helping with the completion of capital improvements. All are making an impact in growing the village.

Growth within our Education Department has provided the Village with attendance for educational programming at an all-time high. New programming such as Homeschool Days has done much to increase attendance and reach new groups. Growth is also represented in the expansion and retooling of our summer camps. We also have added four new education docents. Period Dinners have grown both in attendance and culinary choices.

We want to recognize our volunteers for all they do. It’s with your support that we are now in a place to take the next step. Bethany and Lauren have worked hard to provide opportunities for our volunteers to learn, interpret, and be recognized. Volunteer training, workshops, and an expansion of volunteer recognition helps ensure our volunteers are well trained and acknowledged for their dedication. The staff here is working hard to ensure that the village continues forward. Many of you have already seen the improvements started under Bill. We will continue to work to grow Heritage Village to its full potential.

Steve Preston
Executive Director
As restrictions caused by the pandemic were lessened, general operations of the Village returned to normal and many of our programs and the revenues they generated began to return to pre-pandemic levels. Conversely, federal aid that we relied on in 2020 and 2021 was discontinued.

Total revenue from our annual events increased from $54,600 in 2021 to $72,898 in 2022. Much of the increase can be attributed to Haunted Village, which benefited from good weather every evening. The annual three weekend event saw record attendance and raised $54,966, a 31% increase over 2021, which was the previous record. Most of the other events also generated more revenue than 2021.

While Program income declined in 2021, Education income rebounded nicely, generating $27,821, a 115% increase from 2021. New programs like Homeschool Days and Heritage Kids Club were popular while our Summer Camp and particularly the Pioneer Program generated significant revenue.

The total received from restricted and unrestricted donations rose to $202,472. Restricted donations were generally targeted to capital improvements including replacement of the Elk Lick roof and rebuilding the porch on Dr. Langdon’s office.

Total income for the year was $416,749. Operating expenses held relatively stable at $351,634. As of December 31, 2022, the Village had $134,394 in the checking account, $229,228 in our investment account, and $287,628 in fixed assets (building improvements). Total assets are $655,089. There are no long-term liabilities, and $62,981 in short term liabilities. Total equity is $592,099.

Looking forward, HSO, Inc. will need to raise grants and donations to finish the Myers Schoolhouse, replace aging HVAC equipment, and other capital improvements. We hope to increase program, event, and education income supplemented by membership fees, sponsorships, and targeted grants to cover operating expenses as we continue to expand our programming.

Frank Davis
Treasurer
### Revenue and Expenses 2022

#### Revenue Sources 2022

<table>
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<tr>
<th>Revenue Source</th>
<th>Total</th>
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<tr>
<td>General Admissions</td>
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<tr>
<td>Programs</td>
<td>$5,705</td>
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<tr>
<td>Education</td>
<td>$27,821</td>
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<td>Appeals, Grants, Donations</td>
<td>$276,932</td>
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<td>Memberships</td>
<td>$6,670</td>
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<tr>
<td>Rental/Sales Income</td>
<td>$18,231</td>
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<tr>
<td>Events</td>
<td>$72,898</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$416,749</strong></td>
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#### Expenses 2022

<table>
<thead>
<tr>
<th>Expense</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Administration/Gen. Operations</td>
<td>$151,739</td>
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<tr>
<td>Payroll &amp; Payroll Tax</td>
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<tr>
<td>Insurance</td>
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<td>Events</td>
<td>$11,641</td>
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<td>Education</td>
<td>$556</td>
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<tr>
<td>Program</td>
<td>$3,232</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$351,634</strong></td>
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</tbody>
</table>
Mission
Historic Southwest Ohio brings history alive, focusing on life in the late 1700s through the 1800s.

Board of Directors
Ms. Michele McDonel, President
Mr. Rick Kiefer, 1st Vice-President
Ms. Yvonne Reissig, Secretary
Mr. Frank Davis, Treasurer
Mr. Tom Barhorst
Ms. Mary Bender
Ms. Ruth Horstman
Ms. Kaitlyn Kiepert, Junior Volunteer
Ms. Carol Muntz
Mr. Garrett Woods

Mr. Rick Cribbet, Great Parks of Hamilton Co. liaison
Ms. Kinney Moore, National Society Of Colonial Dames Of America In The State Of Ohio

Steve Preston
Executive Director
Non-Voting Member

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Sharonville, OH 45241

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