

# 2021 Annual Report



Shirley-Eustis House Association

## MISSION STATEMENT

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*The Shirley-Eustis House Association exists to preserve, maintain, and interpret the Shirley-Eustis House and grounds as a museum for the education and enjoyment of the public. The Association seeks to engage the broadest possible community in understanding the role of Shirley Place, since its construction as a Royal Governor's Mansion in 1747, as it reflects the beginning of our nation and the history of Roxbury and Boston.*

## HISTORY

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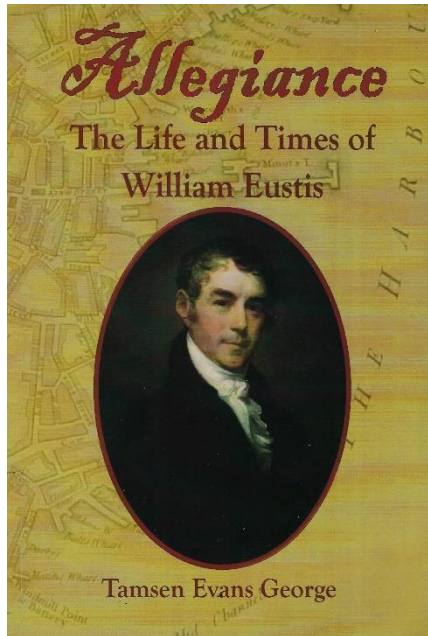
The Shirley-Eustis House Association was founded in 1913 by preservation pioneers William Sumner Appleton, Lillie B. Titus, and others to preserve the 1747 mansion of His Excellency the Royal Governor of the Province of Massachusetts Bay, William Shirley. Flush with rewards from a military victory against the French at Louisbourg, Nova Scotia, the Governor built for himself an English country seat in rural Roxbury. Sited on a bluff above Boston's South Bay, the building soon became a celebrated landmark. Visitors noted its monumentality and Palladian rigor. During the War for Independence, the estate was left in the care of a senior enslaved man and Shirley's former valet, Thomas Scipio. Thomas had been with Shirley for many years, but his whereabouts are unknown after the estate was confiscated by the Massachusetts colonial militia in 1775.

After the Revolutionary War, Shirley Place was owned by a succession of elite New England families who removed its elaborate Baroque adornments and replaced them with smooth plaster walls and delicate Federal woodwork. In 1819 it was purchased by William and Caroline (Langdon) Eustis who had just returned from a diplomatic posting in Belgium and Holland. Eustis was elected governor of Massachusetts in 1823. After his death in 1825, Caroline remained in the house for another 40 years cultivating her gardens and mentoring young women in Roxbury. When she died in 1865, Roxbury was no longer rural, and no longer a fashionable location for Boston's elites. Shirley Place was subdivided and the old mansion became a boarding house and later a tenement. After years of neglect the City of Boston condemned the old mansion in 1913, whereupon Titus and Appleton embarked upon their rescue mission. They formed the Shirley-Eustis House Association and raised the funds to purchase the building. It was declared a National Historic Landmark in 1960 and underwent extensive restoration in the early 1980s. The restoration left intact most of the Federal era changes to the building while documenting its remaining Georgian elements. Visitors to the house today are treated to a storyline that explores the changes in American architecture, politics and culture from the pre-War, pre-industrial world of Roxbury to the rapid growth of urban Boston under the new Republic.

## LEADERSHIP MESSAGE

*William S. Kuttner, President and CEO*

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Some readers of this letter remember Tamsen George, who served as Executive Director of the Shirley-Eustis House Association about twenty years ago. Tamsen recently completed a biography of William Eustis titled *Allegiance: The Life and Times of William Eustis*. This was a challenging effort. Eustis (1753-1825) was a member of Presidents Jefferson and Madison's cabinets, and later served as ambassador to the Netherlands and governor of Massachusetts. Yet he left a very sparse paper trail. If something exists, Tamsen found it.

Upon graduating from Harvard, Eustis began his study of medicine under the famous patriot, Dr. Joseph Warren. Eustis was soon attending Warren's patients while Warren was organizing a new Massachusetts government that would usurp British General Gage's civil authority, initiating the American Revolution. Later Eustis was the director of a

Continental Army hospital near West Point, sharing a home and dinner table with the West Point's beloved and heroic commander, Benedict Arnold. One day Arnold was gone, but the scurvy, dysentery, and amputations were not.

And today, after inconceivably gigantic strides in medicine and statecraft, elements of the profound disorientation in Eustis' world still confront us. A land war had raged in Europe for 20 years, and America was forced to be involved. As Secretary of War in 1812 Eustis had to prepare a nation with no army and a miniscule navy for conflict. Today, America's involvement in world affairs is utterly unavoidable. Now as then the role of democracy in the world order is in question. Indeed, even a common definition of democracy is elusive. Today the science of medicine takes just pride in the treatment of known maladies, yet mass infections by previously unknown microbes emerge with regularity.

The Shirley-Eustis House Association does not solve such crises. Our mission is to effectively preserve and interpret historical resources. This we have done during the gradually abating Covid pandemic, in careful adherence to mandated guidelines. Thanks to Tamsen's thorough research on William Eustis, we can now appreciate our public health, democracy, and world affairs challenges as extensions of the challenges faced by the Mansion's famous owner.

William S. Kuttner, President

## EXECUTIVE DIRECTOR'S REPORT

*Suzy Buchanan*

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In addition to enjoying a gradual emergence from the COVID-19 pandemic in 2021, I had the pleasure this year of working—mostly remotely—with a cheerful array of volunteers as well as our esteemed governors to keep several delayed projects moving forward, inch by inch, against a persistent current of pandemic surges, supply chain disruptions, and a general public hesitancy about how to resume social life again.

Our biggest achievement of 2021 was the City Landmark designation for what is officially called “Shirley-Eustis Place”. This new status was conferred by the Boston Landmarks Commission. The designation was not just an exercise. It has real

community impact, and everyone affiliated with SEHA can take credit for saving the former Governor’s stable at 42-44 Shirley Street, (the W.E. Woodward House). This entire project took almost two years, countless meetings and hearings, and lots of community conversations. Finally in August, City Council approved the designation, and a week later Mayor Kim Janey stood in front of our Carriage House and declared “Shirley-Eustis Place” a Boston City Landmark.

Although the Governor’s Mansion at Shirley Place was already a *National Landmark*, that designation did not actually confer the protections that we now enjoy with the additional *City Landmark* status. Now all three buildings in the Shirley-Eustis Place designation—the W.E. Woodward House, the Shirley Mansion and the Ingersoll-Gardner Carriage House—enjoy permanent protection from demolition and any changes that might permanently alter their defining characteristics as historic buildings must be approved by the Landmarks Commission.

This is a preservation success story that impacts more than the roughly two acres of ground it covers. The basic investigations performed on the W.E. Woodward house have unearthed a number of clues about not only the history of enslavement at Shirley Place and in colonial New England, but also into the architecture of Roxbury’s 18<sup>th</sup> century estates, the ways colonial elites presented themselves to the world, and how the class structure of British society was expressed in the North American colonies. All of these themes reach well into 19<sup>th</sup> century American history and yield insight into our nation’s conflicted efforts to fashion a republic. We have already incorporated the discoveries about 42-44 Shirley Street into our tour programs and the response has been very positive.



That's the outcome of all the meetings, petitions, conversations, paperwork and hearings that we waded through to achieve this milestone. None of it could have been done without the financial support of our membership or the hours put in by our Governors, Overseers and volunteers who help keep things going at Shirley Place on a day-to-day basis. As we move forward into 2022, I look forward to working with everyone to build on these accomplishments and to bring our story to a growing audience



A handwritten signature in black ink, appearing to read 'Suzy Buchanan'.

Suzy Buchanan, Executive Director

## BUILDINGS AND GROUNDS COMMITTEE

*William B. Finch, Chair*

### **Buildings, prepared by Bill Finch:**

Carriage House roof - The construction contract with Gerard O'Doherty of Lincoln, MA was executed, and the new wood shingles delivered to the site in December after repeated delays in the delivery of the shingles due to supply chain/pandemic issues (they had been ordered in August). The supply chain issues also resulted in a very substantial increase in the price of the shingles resulting in a total project cost of about \$83,000. While well above the initial contract price for the work, the estimated cost was within



our original cost estimate and the available grant funding that had been secured with the addition of a generous contribution of a Governor. The wood shingles selected were Alaskan Yellow Cedar having 5/8" thick butts which are expected to last longer than standard 7/16-inch butt shingles. Copper strips with an exposure of 1" stipulated at every seventh course on the north and east pitches will prevent the growth of

fungus and mold on the shingles. These pitches are not readily visible, but because of the trees at the property line had grown a substantial amount of mold on the previous roof.

**Main House Furnace** - A new gas-fired furnace was installed in early December to heat the first floor of the house. The old furnace was about 40 years old and well beyond its normal service life. The new unit consists of two 100,000 BTU power vented furnaces that were “twinned” together to perform as a single unit. The contractor was American Force HVAC, Roy Erickson, with a cost of \$10,175.

**Plumbing** - Substantial repairs were made to the plumbing in the crawl space in August to replace old cast iron pipes that had become extremely corroded. Most of the work was below the apartment. the cost was \$2,493 and the work was performed by Alewife Co.

**Carpentry and Windows** - The window frame and upper sash for the south window in Madam Eustis’s chamber had started to pull away from the wall, and its interior shutters had shifted. The frame was put back to its original position, the sash secured, and the shutter repaired to function. Other work included the repair of the apartment’s exterior screen door, and the repair and rehang of the cupola exterior door that had blown open in a storm, and the construction of a new shutter to replace one that had fallen apart during the exterior painting. The repairs were done in the early fall by Joseph Napolitano (NAPCO) of Gloucester at a cost of \$780 for the window and \$875 for the shutter, screen door, cupola door.

### **Grounds Report, prepared by Jerry Wheelock**

The fruit trees on the terrace and orchard were pruned and fertilized in Spring by arborist KC Chaffee of Jamaica Plain. We also reached out to beekeeper Bill Perkins during the summer to investigate the possibility of hosting a beehive or two on the grounds. While neighbors and friends of SEHA enjoyed the fruits of the orchard in the fall, a group of volunteers from the Boston Area Gleaners also came to pick over fifty large boxes of apples and pears. These were delivered to local food banks. Overseer Archer O’Reilly produced an excellent batch of applesauce with several bags of apples from the orchard.

We continued to highlight the gardens and orchard in our website with an article on the orange wine recipe found in Madam Eustis’s diaries. Madam Eustis is known to have grown oranges and lemons in her greenhouse.

Elsewhere on the grounds we accomplished:

- the installation of a medicinal garden by Mary Lou O’Connor and the Massachusetts Master Gardeners. The apothecary roses that Mary Lou O’Connor planted in fall 2020 survived the winter and produced their first blooms.
- The removal of the mulberry tree in the Madam Eustis garden and the cottonwood in parterre. Both gardens are now essentially restored to their original plans.
- Renewal of the lower garden by the orchard and the addition of some native shade loving plants on the west side of the Carriage House
- Sandblasting and repainting of the cast iron garden urns in August, while many of our metal railings on the terraces were refreshed with new paint.
- The construction of a portable handicapped ramp for the Carriage House, which now makes the building fully accessible.

- Spring urn arrangements were supplied by Dahlia's Garden staff
- Acquisition of a new composting bin in the fall, enabling us to enrich our gardens naturally and inexpensively



## FURNISHINGS AND COLLECTIONS COMMITTEE

*Frederic C. Detwiller, Chair*

**Conservation of Lafayette Bed** - The high post Sheraton bed in the Lafayette Chamber is in process. The committee selected artisan Natalie Larsen to create period appropriate textile and bed furnishings, curtains and coverlet on a reproduction mattress and pillows. Funding is in place to cover costs. There is an on-going search for appropriate fabrics.



**The 1825 Babcock Piano** - A near duplicate of the one used that year to entertain Lafayette in the City of Boston, was delivered to Tim Hamilton for conservation.

**SEHA Archives** - Simmons University graduate students and Professor Sarah Pratt cataloged and described approximately 40 linear feet of documents into an electronic finding aid that now serves as a basis for future archival cataloging. Interns from Simmons College are expected to return every year to continue the project.



**The Watkins Collection** - The Watkins collection of utilitarian objects (kitchen and farm implements) in the Ingersoll-Gardner Carriage House has been sorted, arranged, and properly stored on new shelving intended for the purpose. Several of the items will appear in an online exhibit on the enslaved people of Shirley Place to be rolled out in 2022.

**SEHA Collections** - Volunteers (Virginia McLaughlin and Rachel Hoyle) made further progress in putting permanent numbers on artifacts and transfer them from acidic cardboard to polyethylene boxes. The accession numbers and descriptions are continuing to be entered in the SEHA Collections database.

## DONOR ENGAGEMENT COMMITTEE

*Ashley M. Casavant, Chair*

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The Donor Engagement Committee hosted SEHA's first peer to peer fundraiser in May to celebrate National Preservation Month. Participating board members developed their own giving pages and reached out to their networks to raise \$2,939 in online contributions.

Our annual appeal and membership programs brought in \$18,420 while unsolicited donations totaled \$11,300. As we resumed giving site tours on a limited basis, we also saw an increase in donations by visitors over and above their tour fees. These donations totaled \$485.

Grant income in 2021 included a \$1,000 grant from the Society of the Cincinnati to support the restoration for the new "Lafayette Bed" and a \$13,000 payment from the Boston Community Preservation Commission (CPC) to fund the replacement of the Carriage House roof.

This was the first installment on a \$40,000 grant awarded by the CPC for this project. Our initial PPP loan of \$14,424 was converted into a grant during the year and contributed to our ability to avoid draw downs on our investment accounts to cover operating expenses. We received a second round of PPP funding and applied for Employee Retention Credits as well.

## EVENTS & EDUCATION COMMITTEE

*Suzy Buchanan, Executive Director*

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The Events and Education committee is thankful to our chair, Jeanne Richardson, who stepped down from the committee in April. Jeanne cheerfully and skillfully coordinated publicity, scheduling and implementation of events during her term and brought warmth and style to our online presence.



**Urban Gardening with Pollinators, February, 20** February is too early to be out in a New England garden, but nonetheless we took advantage of the spring gardening itch to host an online program with Mary Lou O'Connor who treated forty plus participants to a seminar on how to encourage pollinators in urban gardens. Mary Lou is the team leader for the Massachusetts Master Gardeners that tend Madam Eustis Garden here at Shirley Place. She gladly volunteered her expertise and time for this program. Her talk sparked a lot of great questions and tips from our participants. "Urban Gardening with Pollinators" was co-sponsored by The Food Project, and as we discovered with previous Zoom programs, many of our attendees were meeting the Shirley-Eustis House for the first time.

**Tea Tasting with the Women of Shirley-Eustis House, March 14** - Jeanne Richardson and the Events Committee hosted an online tea tasting with thirty participants who sampled three types of tea that were popular in the colonial era. The Tea Party was a chance to enjoy some virtual socializing at the height of the pandemic. Suzy provided a mini slide lecture on the role of tea parties in the cultivation of Governor Eustis and Governor Shirley's political interests.

**Mapping and Placing Roxbury, New England and the Imperial Atlantic, April 17** - Garrett Dash Nelson of the Leventhal Map and Education Center presented "Mapping and Placing Roxbury, New England and the Imperial Atlantic" to an international Zoom audience. Using maps from the Leventhal Center's extraordinary collections, Garrett explored how Governor Shirley and the British government used maps and cartography to expand and define the boundaries of the British empire. Garrett also explored how Roxbury grew and changed in the post-colonial era from rural village to integral part of urban Boston.



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On July 18, the Loring-Greenough House invited the Shirley-Eustis House Association to co-host a public reading of Frederick Douglass's 1852 4<sup>th</sup> of July Speech on the lawn at the Loring Greenough House. After the reading, historian Byron Rushing led a discussion of the context for Douglass's speech and its impact on the abolitionist movement.

**Working Report on Slavery at Shirley Place, October 12** - One of our most important activities in 2021 was the ongoing effort to obtain city landmark status for Shirley Place and the W.E. Woodward House (42-44 Shirley Street), the 18<sup>th</sup> century stable built for Governor Shirley. We celebrated that success on August 21 when Acting Mayor Kim Janey held a press event to publicize the new status and to commemorate the lives of the enslaved people in the Shirley Household, particularly in the old stable, where Shirley's footmen, coachmen and stable boys lived and worked. We could not have accomplished this goal without the work done by Aabid Allibhai, graduate student at Harvard University, who undertook the research necessary to reveal the names and identities of the enslaved people who lived in the Shirley household. That information was crucial to helping to save the W.E. Woodward house from demolition. In the Fall, Aabid presented his research findings to nearly 80 people who tuned in to his Zoom

presentation. Kyra Singleton, Executive Director of the Isaac Royal House and Slave Quarters, followed Aabid's talk with a brief commentary on the impact of interpreting enslaved lives on the business interpreting historic houses.

In the interests of safety, we chose not to host a holiday gathering in 2021, but we lit up the grounds at Shirley Place for the holidays again to add light and cheer to the neighborhood.

Looking back at 2021 we are happy to note that although we couldn't directly host any large in-person programs, our virtual events drew in over four hundred people. Additionally, with proper safety measures in place, we hosted over one hundred guests for tours of Shirley Place throughout the year.

## FINANCE COMMITTEE

*Stephen R. Vitello, Treasurer, Mary Flynn, Chair*

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Association's investments are held at Bank of America/US Trust. Its operating account is held at Santander Bank and a separate cash fund is held at Fidelity Investments. The Association's CPA prepared the 2021 annual financial statements and performed a review engagement with respect to the statements.



SEHA's total assets were \$3,461,600\* as of December 31, 2021, up from \$3,070,600\* as of December 31, 2020. This is largely attributable to strong growth in the equity markets, despite the economy's ongoing supply chain and hiring uncertainties stemming from COVID-19. The Association's total 2021 revenue and support, inclusive of all investment activities and contributions was \$616,700 versus \$523,200 in 2020. In addition, donor contributions and tour revenue grew by 9.6%.

Total expenses were \$217,100 in 2021 versus \$150,700 in 2020. The increase was primarily driven by program costs which rose from \$84,000 in 2020 to \$131,800 in 2021. These expenses are primarily attributable to maintenance items including replacement of the Mansion heating system, substantial plumbing repairs, significant tree pruning and removal and other landscape work as well as increases in utilities and security

costs. General administrative costs increased by \$13,000 due to a required refund of a restricted fund award balance. All other administrative costs remained stable.

The market value of SEHA's investments was \$3,303,700 on December 31, 2021 compared to \$2,879,100 on December 31, 2020. Income from Net Assets currently finances a significant portion of annual operating and major restorations expenses. The Executive Director has worked closely with the Board to increase program funding through grants and donor contributions whenever possible. In 2020, the Executive Director secured a \$14,400 Payroll Protection Program Loan, which was successfully converted to a full grant in 2021.

Total Net Assets at Year End 2021 were \$3,443,600 compared to \$3,044,000 at Year End 2020. While the value of the Board Designated Endowment remained the same at \$1,544,400 the Perpetual Endowment increased by \$500 to \$457,600. The Undesignated Endowment increased from \$735,000 in 2020 to \$1,072,700 due to investment gains. Purpose Restricted Funds increased by \$61,400 including increases in Unappropriated Endowment income and grants funds received for several projects.

To assist with operating expenses SEHA drew \$77,200 or 3.1% on its investment accounts three year rolling average of \$2,488,876. An additional \$67,200 was drawn from several Restricted Funds, including Unappropriated Endowment, to cover costs associated with donor purposed and major restoration/repair projects.

*Note\* The Mansion, Ingersoll-Gardner Carriage House, furnishings, objects and numerous parcels of land are not assigned a dollar value because they are considered invaluable. Land listed under assets represents only more recently added "buffer" parcels that are not considered to be part of the collection.*

## SHIRLEY-EUSTIS HOUSE ASSOCIATION 2020 FINANCIAL STATEMENTS

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*Shirley-Eustis House Association Financial Statements Years Ended December 31, 2021 and 2020 with Independent Accountant's Review Report are included at the end of the 2021 Annual Report.*

*See donor acknowledgements on the following pages*

***Thank you to our donors:***

**Annual Appeal - 2021**

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Anonymous	Alan & Marilyn Hoffman
Diane Arenella	Anne E. Hough
Dalton Avery	Neil Husher
Ed and Jo Ann Baskiewicz	Mrs. Edward C. Johnson, III
Linda Cabot Black	Barbara Lambert
Carol Blair	Stephen Landrigan
John Bradley	Anthony Komlyn
David and Deborah Brooks	Lorie K. Komlyn
Ann H. Buchanan†	William S. Kuttner
Suzy Buchanan	Barbara Lambert
Sarah Buermann	Norman Marsh
James J. Calmas	Harriet & Samuel McGraw
Marie Campo	Daniel Lohnes, Essex Alarm and Security
Jane Carr	Robin and Lucas Merrow
Harold Carroll	Lindsay Miller & Peter Ambler
Ashley Casavant	Rick Miners & Jeri Sedlar
Dorothy Clark	Molly Moss
Frances Colburn	Regina Mullen
Ralph Crandall	Joe & Carol Napolitano
Peggy Curtis	Cathy O'Malley
Frederic Detwiller	Brianna O'Shaughnessy
Matthew A. Dickey	Edward Parran
John A. DiSalvo	Kat Pasek
Charles and Sheila Donahue	John Petrowsky
Mary Anne Donaldson	Brian Pfeiffer
Andy Dumaine	Beatrice Porter
Robert English	Theodore Raia
Robert Eustis	Bill & Cathy Salisbury
Steve Eustis	Alison Simmons
William B. Finch	Sylvia Simmons
Mary T. Flynn	Lynn and Peter Smiledge
Steve P. Gaskin	Patricia Smith
David Godine	Susan Elsa Smith
Bonnie Gossels	Franklin Soultis
Nicholas Herman	Lynne Spencer
Hermanson Family in memory of John Hermanson	



### **Annual Appeal – 2021, continued**

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R. Newcomb Stillwell	William Walczak
Peter Stott	Joan T. Walther
Thomas Townsend	Jerry and Elizabeth Wheelock
Jane Talcott	Peter Williams
Althea Wagman-Bolster	Eileen Woodford

### **Preservation Month Fund**

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Anonymous	Elizabeth Johnson
Steven Aucella	William Kuttner
Suzy Buchanan	Mark Lange
Ashley M. Casavant	Maribeth Laurentano
Jeff Cahoon	Jieping Li
Robert J. Carey	Jane Maguire
Leslie Carrio	Una McMahon
John M. Corliss, Jr.	Kathleen Murray
Michelle Coughlin	Kathleen O'Malley
Kerri Donnelly	Elizabeth Paden
Cheryl Donohue	Hugh Adams Russell
Brian and Deborah Downes	Elizabeth Russini
Mary T. Flynn	Thomas M. Sieniewicz
Paul Flynn	Maureen Smith
Richard Foote	Franklin Soult
Nina Garfinkle	Henry Soult
Sara Glassman	Alice Stevens
Virginia Guisti-McLaughlin	

## **Public Support**

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Anonymous  
Boston Community Preservation Committee  
Boston Plan for Excellence  
Fidelity Charitable  
General Society of Colonial Wars  
Massachusetts Foundation for the Humanities  
Massachusetts Society of Colonial Wars  
Massachusetts Society of the Cincinnati  
Schwab Charitable  
Vanguard Charitable

## **MEMBERS DURING 2021**

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### **Lifetime**

Rodney Armstrong†	Mr. & Mrs. Graham Gund	Hamilton Mehlman
Linda Cabot Black	John Bradford Hermanson†	Susan Paine
David & Caroline Case	Anne Eustis Hough	Elise Sigal
Francis Colburn	Blanche Hunnewell	Ruth C. Wyman
Janet Eustis	Mr. & Mrs. Edward C. Johnson	
Mr & Mrs. Robert Eustis	Mary C. Mehlman	

### **Governor's Circle**

Mary T. Flynn  
Bonnie Gossels  
Jennette Roberge  
Jerry & Elizabeth Wheelock

### **Landmark Patron**

Robert Allison	William Kuttner	Thomas Townsend
Dalton Avery	Peggy Richardson	Eileen T. Woodford
Harold Carroll		

## MEMBERS DURING 2021, *cont'd*

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### Sustainer Patron

Peter Ambler & Lindsay Miller	John Bradley	Steve Gaskin
Robert Allison	David & Deborah Brooks	D. Bryan Glascock
Carol Blair	Jeffrey D. Cronin	Martin J. Kain
Diane Arenella	Steve Eustis	Regina Mullen
Carol Blair	John Every	Kat Pasek
Jacqueline Blombach	Terry Frolich	Steve & Elise Pendery
Archer O'Reilly, III	Beatrice Porter	Tegin Teich
Kat Pasek	David A. Risgin	Thomas Thaler
John J. Petrowsky	Erica Sigal	Patricia Violette
William and Maureen Poole	Sylvia Simmons	

### Family

Charles & Miriam Butts	Charles & Sheila Donahue	Rossana Lizama-Soto
Marie Campo	Mr. & Mrs. William Finch	Ruthe L'Esperance
Ashley Casavant	Alan & Marilyn Hoffman	Alison Simmons
Carol Huggins Chirico	Barbara Lambert	Theodore J. Raia
Gary Denton & Dana Comi	Stephen Landrigan	Joan T. Walther
Frederic & Ellen Detwiller	Mr. & Mrs. William Leaf-Hermann	Mr. & Mrs. Stephen S. White

### Individual

Barbara Alenci	Robert English	Patricia Smith
Diane Arenella	Stephen Jerome	Susan Elsa Smith
Beverly & Richard Armour	Judith Kalaora/History at Play	R. Newcomb Stillwell
Robert Bellinger	Barbara Lambert	Peter Stott
Michael Bradford	Catherine Lastavica	Stephen R. Vitello & Denise Breiteneicher
Mary Louise Burke	John Millar	William Wheeler
Kristine Burton	David Mittell, Jr.	Virginia White
Justina Chu	Arnold Sapenter	
Helene Dmochowski		

† deceased

## **SEHA COMMITTEES**

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### **EXECUTIVE COMMITTEE**

Mary Flynn

Patricia Violette

William S. Kuttner

Stephen R. Vitello

Jeanne Richardson (retired in 2021)

Eileen Woodford

### **BUILDINGS AND GROUNDS COMMITTEE**

William B. Finch, Chair

Frederic C. Detwiller

D. Bryan Glascock

Barbara Lambert

Stephen R. Vitello

Jerry Wheelock

### **FINANCE AND BUDGET COMMITTEE**

Mary T. Flynn, Co-chair

Paula M. Merek\*, Co-chair

Steven R. Vitello

### **COLLECTIONS AND FURNISHINGS COMMITTEE**

Frederic C. Detwiller, Chair

William B. Finch

Barbara Lambert

Patricia Violette

### **NOMINATING COMMITTEE**

Jeanne E. Richardson, Chair

D. Bryan Glascock

Bonnie Gossels

Eileen Woodford

### **EDUCATION AND EXHIBITS COMMITTEE & Archaeology Standing Committee**

Steven R. Pendery\* and Eileen T. Woodford, Co-Chairs

### **EVENTS COMMITTEE**

Jeanne E. Richardson\*, Chair

Matthew A. Dickey\*

Ashley Casavant

Patricia Smith

Jeffrey D. Cronin



**BOARD OF GOVERNORS**

William S. Kuttner, *President*  
 Mary T. Flynn, *Vice President*  
 Patricia Violette, *Vice President*  
 Eileen Woodford, *Secretary*  
 Stephen R. Vitello, *Treasurer*  
 Ashley M Casavant  
 Frederic C. Detwiller  
 Matthew A. Dickey\*  
 William B. Finch  
 D. Bryan Glascock  
 Barbara Lambert  
 Paula Merek\*  
 Stephen Pendery\*  
 Jeanne Richardson\*  
 Patricia J. Smith  
 Jerry Wheelock  
 Eileen Woodford

**BOARD OF OVERSEERS**

Robert J. Allison  
 Robert A. Bellinger  
 Frederic C. Detwiller  
 William B. Finch  
 Bonnie Gossels  
 William S. Kuttner  
 David A. Mittel, Jr.  
 Jeanne E. Richardson  
 Arnold Sapenter  
 Alison Simmons  
 Sylvia Q. Simmons  
 Thomas H. Townsend  
 Patricia Violette  
 \*Retired in 2021

**STAFF**

Suzy Buchanan, Ex. Dir.

**VOLUNTEERS**

Jose Barros, Dudley Street Neighborhood Initiative (retired)  
 Dyan Blewett  
 Megan Chase  
 John Correia  
 Jeffrey Cronin  
 Nina Garfinkle  
 Virginia Guisti-McLaughlin  
 Rachel Hoyle  
 Barbara Kurze  
 Rene Mardones  
 and Noah!

Sandra McCroom (Children’s Services of Roxbury)  
 Mary Lou O’Connor  
 Estela Rosario Marino  
 Franklin Soult  
 Henry Soult  
 Louis Soult  
 Steve Vitello  
 Peter Stott  
 Althea Wagman-Bolster  
 Amy Wilson

*Collectively, Governors, Overseers and Volunteers contributed thousands of hours of professional services to SEHA in 2021. Thank you, everyone.*

Shirley-Eustis House Association  
Statement of Financial Position  
December 31, 2021 and 2020

	<u>2021</u>	<u>2020</u>
<b>Assets</b>		
Current Assets:		
Cash	\$ 39,900	\$ 67,400
Accounts receivable	- 0 -	6,500
Other current assets	10,700	10,300
<b>Total Current Assets</b>	50,600	84,200
Investments	3,303,700	2,879,100
Collections (see notes to financial statements)	-	-
Land	106,300	106,300
Restricted cash	1,000	1,000
<b>Total Assets</b>	<u>\$3,461,600</u>	<u>\$3,070,600</u>
<b>Liabilities and Net Assets</b>		
Current Liabilities:		
Accounts payable	\$ 2,900	\$ 2,200
Accrued expenses	15,100	10,000
Government PPP Loan	- 0 -	14,400
<b>Total Current Liabilities</b>	18,000	26,600
<b>Total Liabilities</b>	18,000	26,600
Net Assets:		
Without Donor Restrictions:		
Undesignated	1,072,700	735,000
Board designated for endowment	1,544,400	1,544,400
Total Without Donor Restrictions	2,617,100	2,279,400
With Donor Restrictions:		
Purpose restricted	368,900	307,500
Perpetual endowment	457,600	457,100
Total With Donor Restrictions	826,500	764,600
<b>Total Net Assets</b>	3,443,600	3,044,000
<b>Total Liabilities and Net Assets</b>	<u>\$3,461,600</u>	<u>\$3,070,600</u>

See accompanying notes and independent accountant's review report

Shirley-Eustis House Association  
Statement of Functional Expenses  
Year Ended December 31, 2021  
(with comparative totals for 2020)

	<u>Preservation of House</u>	<u>Other Programs</u>	<u>Total Program</u>	<u>General &amp; Admin.</u>	<u>Fund- Raising</u>	<u>Total 2021</u>	<u>Total 2020</u>
Staffing	\$ 33,400		\$ 33,400	\$41,700	\$ 8,300	\$ 83,400	\$ 83,800
Fund raising			-		200	200	100
Insurance	10,000		10,000	700		10,700	10,500
Maintenance & repairs	63,100		63,100			63,100	18,800
Membership & governance			-			-	-
Museum/Curatorial			-			-	-
Office	1,700		1,700	2,100	500	4,300	5,200
Other programs			-			-	-
Other		\$ 600	600	14,500		15,100	1,700
Professional services			-	11,300		11,300	11,200
Public programs & use		4,200	4,200			4,200	3,900
Public relations			-	400		400	400
Security	11,900		11,900			11,900	9,500
Utilities	6,900		6,900			6,900	5,600
<b>Total</b>	<u>127,000</u>	<u>4,800</u>	<u>131,800</u>	<u>70,700</u>	<u>9,000</u>	<u>211,500</u>	<u>150,700</u>
Collections & restoration	5,600		5,600			5,600	-
<b>Total Expenses</b>	<u>\$132,600</u>	<u>\$ 4,800</u>	<u>\$137,400</u>	<u>\$70,700</u>	<u>\$ 9,000</u>	<u>\$217,100</u>	<u>\$150,700</u>

See accompanying notes and independent accountant's review report

Shirley-Eustis House Association  
Statement of Activities  
Year Ended December 31, 2021  
(With comparative totals for 2020)

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total 2021</u>	<u>Total 2020</u>
<b>Support:</b>				
Contributions	\$ 66,900	\$ 9,100	\$ 76,000	\$ 70,500
Rental income	29,300		29,300	30,800
Admissions, tours	1,400		1,400	100
Public programs	400		400	700
Investment income (net)	423,100	86,500	509,600	421,100
Other Income			- 0 -	- 0 -
Net assets released from restrictions	33,700	( 33,700)	- 0 -	- 0 -
<b>Total Revenue &amp; Support</b>	<u>554,800</u>	<u>61,900</u>	<u>616,700</u>	<u>523,200</u>
<b>Expenses:</b>				
Program	131,800		131,800	84,000
General and administrative	70,700		70,700	57,700
Fund raising	9,000		9,000	9,000
<b>Total Expenses</b>	<u>211,500</u>	<u>- 0 -</u>	<u>211,500</u>	<u>150,700</u>
<b>Excess/(Deficit) of Support over Expenses</b>	<u>343,300</u>	<u>61,900</u>	<u>405,200</u>	<u>372,500</u>
Amounts paid for collections and restorations	5,600		5,600	- 0 -
<b>Change in Net Assets</b>	<u>337,700</u>	<u>61,900</u>	<u>399,600</u>	<u>372,500</u>
<b>Beginning Net Assets</b>	2,279,400	764,600	3,044,000	2,671,500
<b>Ending Net Assets</b>	<u>\$2,617,100</u>	<u>\$826,500</u>	<u>\$3,443,600</u>	<u>\$3,044,000</u>

See accompanying notes and independent accountant's review report



Shirley-Eustis House Association  
Statement of Cash Flows  
Years Ended December 31, 2021 & 2020

	<u>2021</u>	<u>2020</u>
<b>Cash flows from operating activities:</b>		
Change in net assets	\$399,600	\$372,500
<b>Adjustments to reconcile change in net assets to cash provided by operating activities:</b>		
(Unrealized Gain)/Loss on investments	( 433,700)	( 385,400)
PPP loan forgiven	( 14,400)	- 0 -
Decrease in accounts receivable	6,500	300
(Increase) in other current assets	( 400)	( 100)
Increase in accounts payable	700	800
Increase/(Decrease) in accrued expenses	5,100	( 7,900)
<b>Net cash from operations</b>	<u>( 36,600)</u>	<u>( 19,800)</u>
<b>Cash flows from investing activities:</b>		
Purchases of investments	( 92,500)	( 48,900)
Proceeds from sale of investments	101,600	84,500
<b>Net cash from investing activities</b>	<u>9,100</u>	<u>35,600</u>
<b>Cash flows from financing activities:</b>		
Proceeds from PPP loan	- 0 -	14,400
<b>Net cash from financing activities</b>	<u>- 0 -</u>	<u>14,400</u>
<b>Net change in cash</b>	<u>( 27,500)</u>	<u>30,200</u>
<b>Cash, beginning of year</b>	68,400	38,200
<b>Cash, end of year</b>	<u>\$ 40,900</u>	<u>\$ 68,400</u>
Interest paid	<u>\$ - 0 -</u>	<u>\$ - 0 -</u>
Income taxes paid	<u>\$ - 0 -</u>	<u>\$ - 0 -</u>

See accompanying notes and independent accountant s review report

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 1 -- Organization and Purpose:**

The Shirley-Eustis House Association, (the Association) was incorporated as a not-for-profit corporation in 1913 under the laws of the Commonwealth of Massachusetts. The Association exists to preserve, maintain and interpret the Shirley-Eustis House (the House) and Grounds as a museum for the education and enjoyment of the public. The Association seeks to engage the broadest possible community in understanding the role of Shirley Place, since its construction as a Royal Governor's mansion in 1747, as it reflects the beginning of our nation and the history of Roxbury and Boston.

The primary sources of funding for the Association are investment income and contributions from supporters.

**NOTE 2 -- Summary of Significant Accounting Policies:**

Income Tax Exemption

The Association is exempt from Federal and State income taxes under the provisions of Section 501(a) of the Internal Revenue Code as an entity described in Section 501(c)(3). Therefore, no provision for income taxes has been made.

The Association has been determined to be other than a private foundation by the Internal Revenue Service.

The Association believes that all income tax filing positions will be sustained upon examination and does not anticipate any adjustments that would be material. Accordingly, there is no provision for related reserves as of December 31, 2021 or 2020.

Basis of Presentation

These financial statements have been prepared on the accrual basis of accounting.

Comparative Totals

Prior year information is presented in summary form for comparative purposes only and is not a complete presentation in conformity with accounting principles generally accepted in the United States.

Presentation of Net Assets

Net assets are classified in two classes: net assets without donor restrictions and net assets with donor restrictions.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 2 - Summary of Significant Accounting Policies (continued):**

Presentation of Net Assets by Class (continued)

Net assets with donor restrictions are created only by donor-imposed restrictions on their use. All other net assets, including board-designated or appropriated amounts, if any, are legally unrestricted, and are reported as part of the net assets without donor restriction class.

Cash and Cash Equivalents

For purposes of the Statement of Cash Flows, the Association considers all highly liquid investments purchased with an original maturity of three months or less to be cash and equivalents.

Restricted cash consists of a rent deposit received from a tenant.

Accounts Receivable

Accounts receivable are recorded for program income that were earned but uncollected at year-end. A provision for uncollectible accounts is provided when management determines that an account may be uncollectible.

Management expects that all receivable will be collected and accordingly no provision for uncollectible receivables has been provided.

There were no accounts receivable written off as uncollectible during 2021 and 2020.

Contributions Receivable

Contributions are recognized at net realizable value when a donor makes a promise to give that is, in substance, unconditional. Contributions receivable expected to be collected in more than one year are recorded at their present value. Provisions for uncollectible contributions receivable are provided based on management's judgment as to the collectability of each account.

There were no contributions receivable written off as uncollectible during 2021 or 2020.

There were no contributions receivable at December 31, 2021 or 2020.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 2 - Summary of Significant Accounting Policies (continued):**

Investments

Investments in equity securities with readily determinable fair values, mutual funds, and all investments in debt securities are reported at fair value in the statement of financial position. Realized and unrealized gains/losses and investment income are recorded in the statement of activities as changes in net assets without donor restrictions unless their use is restricted by explicit donor-imposed stipulations or law, in which case they are reported as net assets with donor restrictions.

Investments in equity securities, mutual funds, and bonds are valued at fair market value as determined by the last reported sales price on the last business day of the year.

Realized gains and losses are computed based on cost at the time of acquisition.

Board Designated Funds

The Board has designated unrestricted funds for the purpose of supplementing the existing permanent endowment. The assets are invested with other unrestricted funds and investment income is allocated to the endowment.

Fixed Assets

Equipment is recorded at cost or, if donated, at fair market value. Expenditures for equipment in excess of \$5,000 are capitalized. Lesser amounts are expensed. Depreciation on equipment is calculated on the straight-line basis over an estimated useful life of five years.

Expenditures for repairs and maintenance are charged to expense as incurred.

As of December 31, 2021 and 2020 there had been no expenditures for equipment qualifying for capitalization.

Land

Land represents a vacant lot and other surplus land abutting the property on which the Association is located acquired from the City of Boston (the City). In purchasing the lot, the Board believed that any lot abutting the property would be desirable to control and may serve some future purpose.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 2 - Summary of Significant Accounting Policies (continued):**

Accessions and de-accessions

Accessions of artifacts and reconstruction of the buildings and landscape are expensed when purchased. De-accessions are recognized as revenue when sold.

Sale of Artifacts

The Board has adopted guidelines set by the American Association of Museums for sale of furniture and other artifacts. Proceeds from such sales are to be used solely for the purchase of other similar items or direct care of collections. As of December 31, 2021 and 2020 there were no funds designated for accessions.

Support and Revenue

Contributions with no donor-imposed restrictions are recorded as public support without donor restrictions. Contributions with donor-imposed restrictions or given as part of the permanent endowment fund are recorded as net assets with donor restrictions.

Restrictions can arise from purpose-specific program restrictions and/or time restrictions. Upon the lapse of such restrictions, these restricted resources are reclassified to net assets without donor restrictions in the statement of activities as net assets released from restrictions.

Restricted contributions whose restrictions are met in the same reporting period in which the contribution is received are recorded as net assets without donor restrictions.

Contributions that are restricted in perpetuity by the donor are recorded as net assets without donor restrictions.

Unconditional promises to give are recorded as public support at their net realizable value. Conditional promises to give are not included as public support until such time as the conditions are substantially met.

Fees for services are recognized as the related services are performed.

Topic 606 Revenue from Contracts with Customers became effective beginning January 1, 2019. Management believes that the requirements of Topic 606 do not pertain to the Association's sources of revenue and accordingly no changes have been made to the Association's revenue recognition policies.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 2 - Summary of Significant Accounting Policies (continued):**

Functional Allocation of Expenses

The costs of providing programs and the administration of the Association have been summarized on a functional basis in the Statement of Activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited primarily in accordance with payroll dollars spent.

In-Kind Support and Donated Services

A number of unpaid volunteers, including members of the Board of Governors (the Board) and members of the community have made significant contributions of their time to the Association. When the value of the time contributed is subject to objective measurement it is reflected in the financial statements as donated services revenue and expense.

During 2021 and 2020 there was no in-kind support recorded in the financial statements.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Fair Value

The Association adopted the criteria for Fair Value Measurements. These criteria define fair value, establish a framework for measuring fair value and expand disclosures about fair value measurements. These criteria establish a fair value hierarchy that prioritizes the inputs and assumptions used to measure fair value. The three levels of the fair value framework are as follows:

Level I: Inputs that reflect unadjusted quoted prices in active markets for identical assets and liabilities at the measurement date.

Level II: Inputs other than quoted prices that are observable for the asset or liability either directly or indirectly, including inputs in markets that are not considered to be active.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 2 - Summary of Significant Accounting Policies (continued):**

Fair Value (continued)

Level III: Inputs that are unobservable.

A qualifying asset or liability's level within the framework is based upon the lowest level of any input that is significant to the fair value measurement.

The Association's assets and liabilities have been historically valued at fair market values using Level I inputs.

Concentration of Credit Risk

The Association's significant concentration of credit risk consists primarily of cash. The Association maintains its cash deposits with a major financial institution.

Subsequent Events

Subsequent events are transactions or events that occur after the statement of financial position date, but before the financial statements are issued or available to be issued. The accompanying financial statements include the evaluation of subsequent events that have occurred through the date of the review report, which is the date the financial statements were available to be issued.

**NOTE 3 -- Liquidity and Funds Availability:**

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the Statement of Financial Position date, are comprised of the following:

	<u>2021</u>	<u>2020</u>
Cash and cash equivalents	\$ 39,900	\$ 67,400
Accounts receivable	- 0 -	6,500
Earnings on board designated endowment	1,073,700	735,000
Decline in endowment fund earnings subsequent to year-end	( 410,100)	- 0 -
Available resources	<u>703,500</u>	<u>808,900</u>
Short-term obligations	18,000	26,600
Available for expenditure	<u>\$ 685,500</u>	<u>\$782,300</u>



Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 3 -- Liquidity and Funds Availability (continued):**

Endowment funds consist of donor-restricted endowments and funds designated by the board as endowment. Income from donor-restricted endowments is restricted until board appropriation. Donor-restricted endowment funds are not available for general expenditure.

**NOTE 4 -- Investments:**

Investments are comprised of the following:

	<u>2021</u>		<u>2020</u>	
	Market Value	Cost	Market Value	Cost
Money market funds	\$ 50,900	\$ 50,900	\$ 54,100	\$ 54,100
Corporate equities	3,029,300	1,679,200	2,593,500	1,685,000
Corporate bonds	223,500	209,000	231,500	209,000
Total	<u>\$3,303,700</u>	<u>\$1,939,100</u>	<u>\$2,879,100</u>	<u>\$1,948,100</u>

Investment returns are comprised of the following components:

	<u>2021</u>	<u>2020</u>
Interest and dividends	\$ 52,400	\$ 40,000
Investment gains and losses	473,200	394,300
Management fees	( 16,000)	( 13,200)
Net investment (loss)/income	<u>\$509,600</u>	<u>\$421,100</u>

Investments are managed by a professional investment advisor and are monitored and evaluated by the Board of Trustees.

Subsequent to year-end, as the result of general market conditions, there was a significant decline in the market value of investments. As of May 31, 2022 the market value of investment values had declined approximately \$410,000.

**NOTE 5 -- Endowment Funds:**

Donor contributions that are intended for perpetual investment as part of the endowment, the income from which is to be utilized by the Association in meeting its exempt purpose, are classified as net assets with donor restrictions. The income generated by these funds is available for appropriation and

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 5 -- Endowment Funds (continued):**

accordingly are also classified as net assets with donor restrictions until such time as these amounts are appropriated for expenditure. Amounts appropriated are reclassified to net assets without donor restrictions at the time of appropriation.

Investments are managed by a professional investment advisor and are monitored and evaluated by the Board of Trustees.

The Board has adopted a policy of appropriating up to 5% of the total endowment to be used in support of the Association's operations.

Amounts designated for endowment by the Board and earnings on these amounts are classified as net assets without donor restrictions.

Endowment net assets are comprised of the following:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Board Designated	\$1,544,400		\$1,544,400
Earnings on Board Designated	1,073,700		1,073,700
Original donor gifts		\$457,600	457,600
Unappropriated earnings on original gifts		228,500	228,500
Total Endowment	<u>\$2,618,100</u>	<u>\$686,100</u>	<u>\$3,304,200</u>

Reconciliation of endowment beginning and ending balances:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Beginning Balance	\$2,280,500	\$599,100	\$2,879,600
Contributions		500	500
Net investment income	403,600	106,000	509,600
Appropriations	( 66,000)	( 19,500)	( 85,500)
Ending Balance	<u>\$2,618,100</u>	<u>\$686,100</u>	<u>\$3,304,200</u>

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 5 -- Endowment Funds (continued):**

Subsequent to year-end, as the result of general market conditions, there was a significant decline in the market value of endowment investments. As of May 31, 2022 the market value of endowment investment values had declined approximately \$410,000.

**NOTE 6 -- Collections:**

The Association owns a significant collection of objects including the house itself, a National Historic Landmark; the Net assets without donor restrictions consist of net assets Gardner Carriage House; and antiques and objects, some of which were owned by the Eustis and Shirley families. Most objects are from the 18th or early 19th century, some are modern re-productions. All are catalogued and cared for according to American Association of Museum guidelines.

**NOTE 7 - Government PPP Loan:**

During fiscal year 2020 management succeeded in applying for and receiving a loan from the Federal Government's Paycheck Protection Program (PPP) in the amount of \$14,400. During 2021 management successfully secured a second PPP loan. In 2021 Management applied for and received forgiveness of both.

**NOTE 8 -- Net Assets:**

Without Donor Restrictions

Net assets without donor restrictions consist of net assets without donor restrictions.

The Board has designated a portion of the net assets without donor restrictions to be treated as a part of the perpetual endowment.

With Donor Restrictions

Net assets with donor restrictions consist of contributions designated for a specific purpose by the donor as well as amounts designated by the donor for perpetual investment or were raised as a part of the perpetual endowment. Earnings on the perpetual endowment are considered to be net assets with donor restrictions until such time that they are appropriated for expenditure by the Board.

Shirley-Eustis House Association  
Notes to Financial Statements

**NOTE 8 -- Net Assets:**

With Donor Restrictions (continued)

Net assets with donor restrictions are comprised of the following:

	<u>2020</u>	<u>Additions Received</u>	<u>Amounts Released</u>	<u>2021</u>
Carriage house	\$ 33,500	\$ 13,000	\$ 25,600	\$ 20,900
Collections	8,400			8,400
Conservation	3,100			3,100
Coolidge catalog	6,200			6,200
Education	3,700	8,600	1,100	11,200
Eustis book	5,500			5,500
Landscape	89,400		17,100	72,300
Thaler Fund	15,700	1,000	3,900	12,800
Unappropriated				
endowment income	142,000	106,000	19,500	228,500
Perpetual endowment	457,100	500		457,600
Total	<u>\$764,600</u>	<u>\$129,100</u>	<u>\$ 67,200</u>	<u>\$826,500</u>