Contents

Report of the President and CEO .............. 1
Financials ........................................ 12
Officers, 2015–2016 ............................. 14
Council of the Corporation, 2015–2016 ...... 15
2014 Family History Benefit Dinner ........ 16
Capital Campaign ............................... 18
Dame Angela Lansbury  
Honored by NEHGS ............................ 20
Giving Societies ................................. 21
The Founders’ Society  
The John Quincy Adams Society  
The Charles Ewer Society  
The Daniel Webster Society  
The Dr. Henry Bond Heritage Society  
The Benjamin Franklin Society  
The Cornerstone Society  
D. Brenton Simons Capital Fund

Support for Current Programs ................ 28
The President’s Circle, $25,000+  
Lemuel Shattuck Circle, $10,000 to $24,999  
John Ward Dean Circle, $5,000 to $9,999  
Mary Lovering Holman Circle, $2,500 to $4,999  
Henry FitzGilbert Waters Circle, $1,000 to $2,499  
Newbury Street Circle, $500 to $999  
Honorary and Memorial Gifts of $100+ ....... 34
Contributing Members ......................... 36
Honorary Members ............................ 37
Volunteers ............................... 38
Staff, 2015 ........................................ 39

This report covers Fiscal Year 2014, September 1, 2013–August 31, 2014. An appendix to this report may be found online at AmericanAncestors.org.

Throughout this report, asterisks (*) indicate the donor is deceased.

Top: On December 9, 2014, NEHGS introduced the latest evolution of its website, AmericanAncestors.org.

Bottom: Conservation Technician Deborah Rossi removes a document from a bath in our new conservation laboratory.
With great pleasure, I report that the New England Historic Genealogical Society achieved or surpassed all of our ambitious goals for Fiscal Year 2014, the twelve months ending August 31, 2014. During this period, we embraced our purpose, reached more constituents than ever before, made significant strides in each of our cornerstone goal areas (Scholarship, Relationships, Technology, Sustainability), saw increases in every key activity benchmark, and increased our national influence. In particular, we …

- Entered the homestretch of our Capital Campaign.

Our transformative “Connecting Families, Advancing History” Capital Campaign neared completion, with commitments totaling $49.9 million of a $55 million goal. Strategies to complete the campaign focus on seeking new gifts for capital improvements or technological upgrades to AmericanAncestors.org, recruiting of new members of the Cornerstone Society (honoring those who have made commitments of $100,000 or more to acquire or renovate 97 Newbury Street), completing documentation for new or previously planned bequests to NEHGS (for membership in our Dr. Henry Bond Heritage Society), and identifying new major donor prospects interested in supporting core NEHGS activities with closing campaign gifts. Our largest-ever annual benefit dinner, with more than 250 guests, was held on April 25, 2014, in support of the Capital Campaign, with keynote speaker and guest of honor, Doris Kearns Goodwin, who spoke on her many popular history books and was presented a detailed history of her family. Entering our Founders’ Society for Lifetime Giving to NEHGS (of $1,000,000 or more) in 2014 were Wallace S. Wilson and his late wife, Isabel King

PURPOSE STATEMENT: To advance the study of family history in America and beyond, the NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY educates, inspires, and connects people through our scholarship, collections, and expertise.
Strategic Plan

Scholarship
Advance our position as the leader in scholarly excellence in family history.
We will make great strides as the national leader in scholarly and educational excellence in the field. A series of groundbreaking, multi-year study projects on immigrants to America coupled with an online and print publishing program of award-winning compiled genealogies will be recognized as the field’s most comprehensive and authoritative output of enduring scholarship.

To support and perpetuate scholarship of permanent value, our staff, in collaboration with independent genealogists and historians, will launch the premier training program for genealogists, an immersion experience at NEHGS. This program will reflect the highest standards of excellence in research and publishing. As a result of the dialogue across disciplines and the introduction of new talent, we will have a greatly expanded scope of work that inspires and engages new audiences through increased production of materials focused on diverse ethnicities. More than ever, our scholarship will reflect the varied faces of America.

Relationships
Ensure that each constituent identifies as a member of the NEHGS family history community.
The practice of deepening and strengthening relationships with our constituents will be an institutional priority across all our activity areas. Our staff, trustees, councilors, and volunteers will approach every constituent with the knowledge that each person can and should be moved along a continuum of engagement leading to meaningful and mutually beneficial relationships of lasting value. We will create a culture where constituents are excited to identify themselves as members of our community. This process will begin in 2013 with the appointment of our first Director of Constituent Relations, a position intended to significantly advance this goal.

Technology
Maximize use of technology for connecting to constituents and affirming our position as the center of scholarly excellence.
Our continued investment in technology as a central engine of the institution will be a major commitment of this period. We will implement innovative tools to embrace market changes and substantially improve our ability to serve constituents at a distance with personalized services. We will also leverage technology to scale our operations to meet the growth in demand for family history services. By developing a comprehensive virtual visit experience using web-based and mobile technologies, constituents will be able to remotely attend lectures and seminars, receive research assistance from our genealogists via video-chat, access 50,000 digitized books from the newly re-launched online Circulating Library, and access over 500 million database records on any computer, Smartphone, or tablet. Our successful leveraging of technology will allow us to deliver the best-in-class genealogical content and services.

Sustainability
Ensure financial sustainability.
We will exceed our Capital Campaign goal of $55 million, fund and renovate 97 Newbury Street, and will be well on the path to achieving a more stable long-term financial model. As a result of new permanently restricted gifts and a successful investment strategy, our endowment will have grown substantially, despite the fact that many of the largest gifts and bequests will be realized in future years.
We will embrace new and effective ways to increase philanthropic activities to provide us with stronger and more reliable revenue streams to help advance our important purpose. We will expand our constituency and will implement new tactics and techniques to identify and cultivate more new donors, advance our family history publishing program as a fundraising vehicle, and invest in our capacity to serve constituents and garner their strong support.
We will also enhance our earned revenue activities, including programs and services, publications, and a new museum shop that will generate exponentially more revenue than the $30,000 earned annually in the existing bookshop.
Brown Wilson, in whose memory our garden on Newbury Street was named. Our current Capital Campaign tally, as of March 16, 2015, is now over $53 million. Following the close of the fiscal year, a Capital Campaign benefit dinner honoring Dame Angela Lansbury was held in November 2014, generating further campaign proceeds, and two events are planned in April 2015: a book signing by Her Royal Highness Princess Michael of Kent, and our annual Family History Benefit Dinner featuring noted political advisers Mary Matalin and James Carville, whose participation was graciously arranged by our trustee Judy Freeman. These events, along with a celebratory dinner to be held in October 2015 to mark our Society’s 170th anniversary, will add to our campaign total. Being inducted into our Founders’ Society for Lifetime Giving to NEHGS (of $1,000,000 or more) in 2015 are Trustees Emeriti and longtime supporters, Kenneth and Beverly Haughton.

• Initiated planning for our future growth.

Donors swiftly and generously supported the acquisition of the adjacent, five-story brownstone townhouse located at 97 Newbury Street with commitments totaling $2.4 million of its $3 million bargain purchase price. Our current tally for this expansion, as of March 16, stands at $2.7 million. This initiative not only attracted existing donors, but brought significant new support from individuals or foundations who had never made large gifts to our organization as well as others inspired by the rare opportunity to expand the footprint of our now space-constrained Back Bay headquarters. Concurrently, we began a careful process for exploring and prioritizing the many ways in which this much-needed space can be renovated and used in the coming years. Under consideration are uses for the benefit of additional public programming for adults, youth, and families, collaborative enterprise and collection space with likeminded organizations, such as the American Jewish Historical Society, staff and member work and meeting facilities, an exhibition center for family history and DNA interpretation, an expanded retail operation, and more. After the close of the fiscal year, two retreats were held to discuss our future expansion; the first co-facilitated by David H. Burnham, Chairman of the Board of Trustees, and Elizabeth Cabral Curtis, our longtime strategic planning consultant. Co-chairing a committee being formed in 2015 to plan the use of our future expansion will be trustees Nancy S. Maulsby and Peter C. Steingraber.

• Produced the finest scholarship in the field.

Our commitment to providing the finest genealogical scholarship continued unabated. Fiscal year 2014 marked the publication of two especially important volumes showcasing genealogical best practices: Robert Charles Anderson’s *Elements of Genealogical Analysis*, lays out his meticulous approach to research that has propelled the Great Migration series to greatness for more than two decades, as well as a *Guide to Genealogical Writing*, which encourages readers not only to write and publish their family histories but shows them all the steps required to do so. Our “Portable Genealogist” series continued to offer a way to provide our scholarship and expertise in a brief format, and these guides became a popular and affordable staple of our sales program. Under our Newbury Street Press imprint, we released high quality compiled genealogies. Especially notable in this category was *Ancestors and Descendants of George Rufus Brown and Alice Nelson Pratt*, by Christopher Child and two independent scholars, Patricia Law Hatcher and Kelvin L. Meyers. This volume is significant because it provides a comprehensive look at an American family with both southern and New England roots — and through its accessibility and innovative presentation shows that an authoritative genealogical study can be engaging to all readers. Our periodicals, offered both in print and online, continued to make contributions to our success and to the advancement of the field. *American Ancestors*, our quarterly magazine, appeals to family historians of all levels through
the presentation of compelling historical accounts, interesting case studies, helpful research strategies, and useful sources from our own collections and expert staff. Among the highlights of the year were an issue devoted to “domestic perspectives,” with a cover article by Judy Lucey; and articles by guest scholars Cornelia Dayton and Sharon Salinger, David Laskin, and Marilynne Roach. The Register, the flagship journal of American genealogy, completed a six-part article on the Sherman family, which included twelve Great Migration colonists. Other notable articles included one that extended the ancestry of three New England families back to the twelfth century, and an article about a family of Native American ancestry. Much of our most heavily accessed scholarship and primary source data was offered via AmericanAncestors.org.

Chief among the compiled genealogical sources published online in this period were significant additions to The Pennsylvania Genealogical Magazine, Rhode Island Roots, the Search for Missing Friends: Irish Immigrant Advertisements, 1831-1920, and new original scholarship for our exclusive projects, Early New England Families Study Project, 1641-1700 by Alicia Crane Williams, and Western Massachusetts Families in 1790 by Helen S. Ullmann with member submissions.

- **Commenced an historic expansion of AmericanAncestors.org.**

NEHGS entered into an historic agreement with our partners at FamilySearch.org to collaborate on producing new online content to be shared between our respective audiences, to bring more than a billion searchable records to our website, including U.S. federal census transcripts (1790–1930); civil registrations for Italy, Germany, Scotland, and the Netherlands; English birth, christening, marriage, and death record transcripts dating from the fifteenth century through the twentieth century; and a panoply of census records, birth records, marriage records, and death records for states across the U.S. At the same time, we planned an ongoing series of upgrades to AmericanAncestors.org, which emphasized improvements in search functionality, updated design that more
clearly identifies the American Ancestors brand, compatibility with mobile devices such as smart phones and tablets, implementation of an enterprise-level online store tool, continued systems compatibility between the website, accounting software and the constituent database, importation of new record sets, and future planning for a family tree experience. This process was aided by a group of staff, Board, and Council members who met regularly to share ideas and advice throughout this period. Work continues across all fronts of our website to optimize the user experience, including improving the indexing and data quality of existing digital databases to improve record discoverability, uploading unique collections from our library and manuscript holdings, and adding new features to the search function, such as suggested results.

- Exported our intellectual capital to online students via innovative platforms and provided numerous educational opportunities.

Educational programs and tours flourished in fiscal year 2014. We offered scores of in-house lectures and a host of regional programs, as well as NEHGS expert-guided trips to genealogical repositories in Salt Lake City, Albany, and Hartford, and Nova Scotia, as well as our first-ever heritage tour of Nantucket, led by trustee Donald R. Friary. In addition to our ever-popular range of in-person programs and national and international tours, we successfully launched a new wing of our education area that focuses on online learning opportunities at AmericanAncestors.org. This initiative allows us to interact with a wider variety of users and age groups. It has had a major impact on our ability to reach much wider audiences and in its first year tripled, to more than 9,000, the number of individuals we serve in educational programming. Included in this groundbreaking program are several categories of new, easy-to-use offerings, including members-only online courses. Our courses for members delve deeply into specific research,
historical, and methodological topics (fees typically range to $35 to $115 per course), and many of these programs have quickly sold out, allowing us to investigate new ways of scaling this successful new activity area. Initial offerings for members only included “Bridging the Atlantic” by David C. Dearborn and “Using Microsoft Word to Write Your Family History” by Penelope Stratton. Other programs include online webinars, free and open to the public, that describe our collections, services, areas of expertise, and the myriad of ways NEHGS can help researchers. Our webinars educate existing constituents and serve as an enticement to others to forge a more intimate engagement with NEHGS. At our new Online Learning Center at AmericanAncestors.org/education/learning-resources, visitors can find more than twenty new “subject guides” that serve as concise introductions to specific research topics and provide links to our resources, online or onsite. Among the most popular subject guides in fiscal year 2014 were, “Getting Organized,” “Irish Genealogy,” and “17th Century New England." Another feature is our suite of how-to videos and past webinars that can be easily viewed from home. The most viewed videos focused on genealogical writing and publishing, maximizing online search results, and accessing NEHGS resources from home. Added to this are a collection of downloadable, commonly used research templates (e.g., five generation charts, family group sheets, research logs, etc.). In addition to being able to serve more constituents and spread knowledge widely, our online education program is quickly becoming an attractive new source of earned revenue for NEHGS.

- Advanced our social media strategy and introduced our Vita Brevis blog.

We interacted with tens of thousands of family historians and professional genealogists, and responded proactively to shifting user demographics and preferred communication tools, through daily or weekly social media interactions across several platforms that strongly support our relationship-building cornerstone goal. Our electronic newsletter, The Weekly Genealogist, reached more than 70,000 subscribers every week. Distributed on

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### Tours and Programs, Fiscal Year 2014

- **New Brunswick Research Tour**
  - September 22–October 1, 2013

- **Fall Weekend Research Getaway**
  - October 17–19, 2013

- **Researching Criminal Ancestors**
  - October 23, 2013

- **Salt Lake City, Utah, Research Tour**
  - November 3–10, 2013

- **Preserving & Identifying Family Photographs with Maureen Taylor**
  - November 15, 2013

- **Using AmericanAncestors.org**
  - November 20, 2013

- **Mobile Genealogist: Evernote and Dropbox**
  - January 11, 2014

- **Can’t Make it to Hartford? Power Researching Connecticut Genealogy Online**
  - January 22, 2014

- **Mobile Genealogist: Imaging on the Go**
  - February 1, 2014

- **Getting Started in Genealogy**
  - February 5, 12, 19, 2014

- **Weekend Research Getaway**
  - February 27–March 1, 2014

- **NEHGS/TIARA Genealogy Seminar**
  - March 8, 2014

- **Using AmericanAncestors.org**
  - March 12, 2014

- **Six Women of Salem**
  - March 12, 2014

- **Uncovering African American Stories**
  - March 26, 2014

- **Hartford, Connecticut, Research Tour**
  - April 1–6, 2014

- **Organizing Your Family History Seminar**
  - April 27, 2014

- **Crafty Bastards: Beer in New England from the Mayflower to Modern Day**
  - May 7, 2014

- **Writing and Publishing Seminar**
  - May 15–16, 2014

- **American Jews & America’s Game: Voices of a Growing Legacy in Baseball**
  - May 21, 2014

- **The Quack’s Daughter**
  - June 4, 2014

- **Nantucket Heritage Tour with Donald Friary**
  - June 12–15, 2014

- **Preserving and Identifying Family Photographs with Maureen Taylor**
  - June 13, 2014

- **Nova Scotia Research Tour**
  - June 22–29, 2014

- **Free Fun Friday**
  - July 11, 2014

- **Albany, New York, Research Tour**
  - July 23–27, 2014

- **Family History Day**
  - August 2, 2014

- **Old Connecticut Path Tour**
  - August 11, 2014

- **Come Home to New England**
  - August 12–16, 2014
The Weekly Genealogist provides readers with news and information about NEHGS and the wider genealogical community through informative and entertaining articles, surveys, and announcements. Features include a description of the latest databases on AmericanAncestors.org, new bookstore items, educational opportunities, and special offers. Elsewhere, staff members provided daily updates and initiated frequent user interactions on our Facebook page. Currently, as of March 16, 2015, we have more than 26,000 Facebook friends. The NEHGS Facebook page connects genealogy enthusiasts by sharing news, research articles, and new database or manuscript information, by engaging our friends in discussion, it allows the staff a convenient platform to answer questions and field more-detailed enquiries from current or potential members. Another platform for communication is our “American Ancestors Connect” program, which provides active communication by a monthly email dedicated to our large pool of more than 70,000 registered guests. This communication is intended to educate them about NEHGS offerings, move them into membership conversion, and provide enticing NEHGS service trials or purchasing opportunities. Finally, in January 2014, we introduced our Vita.
Brevis blog to offer another avenue for reaching the genealogical community by offering short essays from our expert staff, which often detail their own research problems and successes. Our blog also highlights different types of records, provides helpful guidelines, and discusses other topics of interest to a broad range of family historians. After only two months, our blog had almost 34,000 monthly average page views, and by the end of the fiscal year it was receiving almost 40,000 monthly page views. Vita Brevis quickly emerged as a popular new offering embraced by our members and guests, and its use has continued to increase.

- Brought greater public awareness to our special collections.

Our frequently overlooked but important object collection was brought into greater view than ever before with significant public exposure through key exhibitions and press coverage during this period. Spurring this activity was an eight page, fully illustrated profile, “American Decorative Arts at the New England Historic Genealogical Society,” by Grace Friary, which appeared in the spring 2013 issue of Antiques & Fine Arts. This coverage resulted in our selection as the official exhibitor at the autumn 2013 Ellis Boston Antiques show, where a loan exhibition of some of our most interesting and visually stimulating objects was on display to thousands of visitors over the course of the event. This exhibition, in turn, inspired a major cover feature on NEHGS and our collections over three pages in Antiques & The Arts Weekly in January 2014. Finally, this last feature article, with its announcement of a recently acquired portrait by NEHGS, served as the impetus for the Museum of Fine Arts, Boston, to borrow our portrait of the African American mariner and merchant, Captain Paul Cuffe, for its 2014 exhibition, “Magna Carta: Cornerstone of Liberty,” where it was displayed alongside an original 1215 copy of the Magna Carta, drafts of the Declaration of Independence, the Sons of Liberty bowl, and other iconic objects and art associated with concepts of freedom and liberty, and where it was viewed by thousands of

Online Programs,
Fiscal Year 2014

Expand Your Research Using NEHGS Online Databases
November 6, 2013
Maximize your AmericanAncestors.org Search Results Part I
November 20, 2013
Maximize your AmericanAncestors.org Search Results Part II
December 18, 2013
Get the Most from NEHGS…from Home!
January 22, 2014
Ten Steps for Writing & Publishing Your Family History
January 29, 2014
Find Your 17th-c. New England Ancestors at NEHGS
February 15, 2014
Online Course: Bridging the Atlantic
March 8, 2014
Irish Resources at NEHGS
March 25, 2014
Online Course: Getting Started
March 15, 22, 29, 2014
Access the Expertise at NEHGS from Home
April 10, 2014
New England Vital Records at NEHGS
May 29, 2014
Online Course: Organizing Your Family History Research
June 11, 18, 25, 2014
Online Course: Using Word to Write Your Family History
June 14, 2014
Get the Most from the NEHGS Online Library Catalog
June 26, 2014
Online Course: Writing and Publishing Your Family History
July 12, 19, 2014
Finding Your Union Civil War Ancestor at NEHGS
August 21, 2014
Online Course: Building Your Genealogical Skills
August 9, 16, 23, 2014
adults, children, and families at the MFA over the course of the summer of 2014. An online exhibition at AmericanAncestors.org of genealogical needlework samplers curated by Dan and Marty Campanelli in this period, attracted member notice and was, more recently, the subject of an article on this NEHGS resource in The New York Times on February 20, 2015.

- **Achieved budget with an operating surplus and increase in total net assets.**

The goals of our annual budget were achieved, and the fiscal year was completed with a cash surplus. Increases were made in both contributed and earned income. Within the earned income category, sales and membership had noteworthy positive years, and both exceeded budgetary expectations. During this period, a new approach to membership was taken as an outgrowth of Strategic Plan 5: this activity area was brought under the direction of senior management responsible for development; our member services team was given an expanded role in recruitment efforts, especially in further developing and capitalizing upon significant increases in contributed membership categories; and a seven-phase constituent relations program was initiated. Concurrently, NEHGS continued to transition into a new investment program through management provided by GMO and Sit Investment Associates as directed by the Investment Committee of the Board of Trustees. In summary, with a highly performing staff team, increased earned revenues, generous member support, and significant market gains, the total net assets of NEHGS grew by an historic $3.3 million in this year.
• Received an excellent audit.

An annual independent audit, conducted by the firm of Alexander, Aronson, Finning & Co., P.C. and presented to the Society’s audit committee of the Board of Trustees on January 30, 2015, confirmed our positive results, demonstrated the organization’s substantial increase in net assets, and provided a clean, unmodified opinion that the financial statements for Fiscal Year 2014 present fairly, in all material aspects, the financial position of the New England Historic Genealogical Society. In addition, the auditors found no significant deficiencies or material weaknesses in our financial statements or internal controls, and there were no auditor-initiated adjustments to our financial statements. The strengthening of our finance team and its adherence to all recommendations were roundly noted by the auditors.

• Increased our national influence.

During fiscal year 2014, NEHGS staff members hosted programs or attended genealogical conferences throughout the United States and, in doing so, reached thousands of our constituents or prospective members, networked and collaborated with leading Internet and library providers, interacted with the leaders of local historical and genealogical societies, and delivered presentations to members at large, key opinion leaders, and scholars in our field. In particular, NEHGS senior staff and staff genealogists participated in Roots Tech, a conference sponsored by FamilySearch.org in Salt Lake City with more than 10,000 attendees. Reaching even larger national audiences, NEHGS was once again the anchor location for the television series “Finding Your Roots with Henry Louis Gates, Jr.” now in its second season on PBS, a collaboration that extends to conducting genealogical research on the show’s televised guests and offering research advice through a weekly online column co-authored by NEHGS trustee Henry Louis Gates, Jr., and NEHGS staff genealogists, emphasizing African American and Native American genealogy, on TheRoot.com, a Washington Post Company website. “Finding Your Roots” remained a highly popular offering on PBS, attracting more than 2 million viewers per episode, and future seasons of the series are being planned. Our productive and rewarding collaborations with Henry Louis Gates, Jr. were the subject of a cover feature of American Ancestors magazine just after the close of the 2014 fiscal year. Finally, NEHGS was recognized as a
top-ten world destination in genealogy in an article in USA Today on January 14, 2014. These, and many other welcome forms of public recognition, helped to increase our profile as America’s leading nonprofit center for high quality genealogical research and associated services.

In conclusion, the positive effects of our work were seen across all major activity areas of our organization in fiscal year 2014: they included increases in new memberships, membership upgrades, AmericanAncestors.org website usage, library usage, research for hire, and educational program attendance. As this report is submitted, we are in a new fiscal year in which all positive trend lines continue, and in which we will celebrate our society’s 170th anniversary as the founding genealogical organization in America and as the most trusted name in genealogy today. I want to thank our members, volunteers, interns, staff members, executive team, officers, trustees, councilors, supporters, scholars, and friends, for a most extraordinary year in the long history of our organization. Although we have much work ahead of us, we are confident that the promise of our purpose—to educate, inspire, and connect people in the study of family history—shines brightly.

Respectfully submitted,

D. Brenton Simons
President and CEO

On July 11, 2014, the Highland Street Foundation sponsored a "Free Fun Friday" at NEHGS, enabling hundreds of newcomers free admission throughout the day.
# Financials

## Summary Balance Sheet as of year end August 31, 2014

<table>
<thead>
<tr>
<th>Balance Sheet</th>
<th>FY14</th>
<th>FY13</th>
<th>Increase (decrease)</th>
<th>% Increase (decrease)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets</td>
<td>$52,211,328</td>
<td>48,823,241</td>
<td>3,388,087</td>
<td>6.94%</td>
</tr>
<tr>
<td>Liabilities</td>
<td>5,815,384</td>
<td>5,765,197</td>
<td>50,187</td>
<td>0.87%</td>
</tr>
<tr>
<td>Net Assets</td>
<td>46,395,944</td>
<td>43,058,044</td>
<td>3,337,900</td>
<td>7.75%</td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$52,211,328</strong></td>
<td><strong>48,823,241</strong></td>
<td><strong>3,388,087</strong></td>
<td><strong>6.94%</strong></td>
</tr>
</tbody>
</table>

## Operating Financial Statement (a) September 1, 2013–August 31, 2014

<table>
<thead>
<tr>
<th>Revenue</th>
<th>FY14</th>
<th>FY13</th>
<th>Increase (decrease)</th>
<th>% Increase (decrease)</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment Return</td>
<td>$1,306,000</td>
<td>$1,250,770</td>
<td>4.42%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Designated for Operations (b)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income from Operations</td>
<td>3,345,046</td>
<td>3,311,220</td>
<td>1.02%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Contributed Income</td>
<td>2,776,705</td>
<td>2,734,533</td>
<td>1.54%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$7,427,751</strong></td>
<td><strong>$7,296,523</strong></td>
<td><strong>1.80%</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>FY14</th>
<th>FY13</th>
<th>Increase (decrease)</th>
<th>% Increase (decrease)</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Services</td>
<td>$630,966</td>
<td>$449,861</td>
<td>40.26%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Research Library</td>
<td>2,094,034</td>
<td>1,685,826</td>
<td>24.21%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Tours and Seminars</td>
<td>599,305</td>
<td>700,299</td>
<td>-14.42%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Retail Store</td>
<td>149,972</td>
<td>137,094</td>
<td>9.39%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Publications</td>
<td>1,353,449</td>
<td>1,236,170</td>
<td>9.49%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td>1,083,279</td>
<td>1,245,166</td>
<td>-13.00%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>General and Administrative</td>
<td>1,329,568</td>
<td>1,557,082</td>
<td>-14.61%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>551,225</td>
<td>579,648</td>
<td>-4.90%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$7,791,798</strong></td>
<td><strong>$7,591,146</strong></td>
<td><strong>2.64%</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>

| Net Income from Operations | (364,047)    | (294,623)    |                     |                      |
| Endowment Assets (c)       | 20,651,472   | 18,641,524   |                     |                      |
| Gain/(Loss) on Investments | 3,047,207    | 2,019,589    |                     |                      |

Respectfully submitted,

Bill Griffeth, Treasurer

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(a) This financial statement represents the general operating activities for New England Historic Genealogical Society only. Other non-operating activity, including realized and unrealized gains on restricted assets, can be found within the audited financial statements.

(b) “Investment Return Designated for Operations” represent the endowment funds and additional Family History funds approved by the Board of Trustees to support annual operations. The annual draw is based on appropriating 4.5% of the preceding twelve quarter fair market value of the investments. The released Family History board designated funds amounted to $550,000 in FY14 and $500,000 in FY13.

(c) Excludes beneficial interest in pooled income funds and charitable gift annuities.
**Expenses**

- Research Library: 27%
- Member Services: 8%
- Tours and Seminars: 8%
- Retail Store: 2%
- Publications: 17%
- Website: 14%
- General and Administrative: 17%
- Fundraising: 7%

**Revenue**

- Income from Operations: 45%
- Contributed Income: 37%
- Investment Return Designated for Operations: 18%
Officers, 2015–2016

David H. Burnham, Chairman
David H. Burnham of Boston, Massachusetts, is a partner at Burnham Rosen Group, a firm specializing in empirically-based leadership development, sales development, executive coaching, competency development, and psychometric assessment of candidates for senior roles. BRG has offices in Boston, London, and Stockholm, and serves large corporations, governments, and non-profits worldwide. David regularly coaches and advises C-suite executives including CEOs. David is a member of the Society of the Cincinnati, the Society of Colonial Wars, and The Pilgrims of the US and UK. He is a life member of the Bostonian Society and the Colonial Society of Massachusetts. He is a Proprietor of the Boston Athenaeum and has served on the vestry of St. Stephen’s Episcopal Church in Cohasset, MA. David holds an MBA from Harvard Business School, where he was the Willard Prescott Smith Fellow. He has taught at a number of universities and Management Institutes, including Harvard Business School, the Universities of Hawaii and South Florida, the Australian Institute of Management, and Hernstein Institut fur Unternehmens Fuhrung in Vienna. David was also President and CEO of publicly-traded Intermedia Systems Corp. and the former President of the Board at Children’s Museum of Boston. David is a former Trustee and Councilor of NEHGS, and has been a member since he was a teenager.

Nancy S. Maulsby, Vice Chairman
Nancy S. Maulsby of Greenwich, Connecticut, is former Vice President of Corporate Communications and Protocol at Chase Manhattan Bank and co-founder of Development Unlimited, Inc. a provider of management services for not-for-profits. She has served on several boards of not-for-profits and educational organizations including the Historical Society of the Town of Greenwich, The Buckley School, Grosvenor Neighborhood House, the Metropolitan Opera Guild, and Hartwick College. While living in Greenwich, Connecticut, she was actively involved with Christ Church Greenwich having served on its vestry and in the Junior and Senior Warden positions. Nancy is a member of the Human Resource Committee, the Development Committee, and the Strategic Planning Committee. She is a former Trustee and Councilor and has been a member of NEHGS since 2002 and a life member since 2009.

Bill Griffeth, Treasurer
Bill Griffeth of Park Ridge, New Jersey, is a veteran financial journalist who has been covering Wall Street on television since 1981. He currently co-anchors CNBC’s “Closing Bell” each weekday from the New York Stock Exchange. He has been nominated for six Cable ACE awards, including best news anchor, and one Emmy for the CNBC documentary “Game On!”, and in 2001 he was the recipient of the National Association of Investors’ “Distinguished Service Award in Investor Education.” Bill is the author of By Faith Alone: One Family’s Epic Journey Through American Protestantism, Ten Steps to Financial Prosperity and The Mutual Fund Masters, and he has contributed articles to American Ancestors magazine. He is a former NEHGS Trustee, Councilor, and Chair of the Finance Committee, who has been a member of the Society since 2005.

Morrison DeS. Webb, Secretary
Morrison DeS. “Toby” Webb of Harrison, New York, is a retired Executive Vice President of External Affairs and Corporate Communications at Bell Atlantic, was an Executive Vice President and General Counsel of NYNEX, and was also General Counsel of New England Telephone. He has graduate teaching experience at Manhattanville College in strategy and government affairs and Board experience with Bell Atlantic, the Folger Shakespeare Library (Washington, DC), the Chebeague Island (Me.) Historical Society, and the Weston Playhouse Theatre Company in Vermont. Toby is a U.S. Navy veteran and a graduate of Amherst College and Harvard Law School. He is an NEHGS Trustee, a member of the Society’s Strategic Planning Committee, a former Nominating Committee Chair, a member of the Charles Ewer Society for Giving, a Life Benefactor of NEHGS, and a member of the Society since 1992.

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*Deceased
Doris Kearns Goodwin, Pulitzer Prize-winning American biographer and presidential historian, was honored with a Lifetime Achievement Award in American History and Biography at our Family History Benefit Dinner on Friday, April 25, 2014 at the Taj Boston Hotel. She was presented with her own custom-bound family history, researched by Christopher C. Child, Senior Genealogist of NEHGS’s Newbury Street Press, and David Allen Lambert, Chief Genealogist. The largest fundraising event in NEHGS history, over two hundred and fifty guests heard her keynote on the bestselling book, *The Bully Pulpit: Theodore Roosevelt, William Howard Taft, and the Golden Age of Journalism*. The event raised more than $120,000 in support of the Society’s capital campaign, Connecting Families. Advancing History.

**Lifetime Achievement Award for American History and Biography**

Doris Kearns Goodwin

**Host**

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---

Above: Brenton Simons with Doris Kearns Goodwin, holding a Teddy Roosevelt letter from NEHGS archives.

Below: Family History Benefit Dinner in the Grand Ballroom of the Taj Boston Hotel.
Top: Treasurer and host Bill Griffeth takes a “selfie” with Doris Kearns Goodwin.

Middle: Joan Little and Doris Kearns Goodwin.

Bottom: NEHGS Chief Genealogist David Allen Lambert, Senior Genealogist Marie Daly, and Senior Genealogist Christopher C. Child with Doris Kearns Goodwin, displaying the custom-bound family history book they helped research for presentation to her.

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Overall Campaign Goal: $55 million

- Annual Giving ($13 million)
- Endowment ($29.5 million)
- Content Development ($1.5 million)
- Website/Technology ($1.5 million)
- Materials Acquisition and Access ($3 million)
- Capital Improvements and National Headquarters Expansion ($6.5 million)
Philanthropy is not only the oldest tradition at NEHGS, it is also the key ingredient that has led to the strength and growth of our institution. To continue to be the leading nonprofit genealogical institution in the country, we rely on the generosity of donors like you to help us fulfill our vision: To advance the study of family history in America and beyond, NEHGS educates, inspires, and connects people through our scholarship, collections, and expertise. Currently, all contributions to NEHGS support our $55 million comprehensive capital campaign, and as of April 10, 2015, we have received 21,835 gifts totaling $53,709,222.
To mark the milestone of reaching $50 million in the NEHGS Capital Campaign, on November 13, 2015, more than 150 supporters of NEHGS enjoyed a benefit dinner honoring one of the most beloved performers of our times, the legendary Dame Angela Lansbury.

President and CEO Brenton Simons presented Miss Lansbury with a Lifetime Achievement Award in the Performing Arts, shared her family history prepared by NEHGS genealogists, and gave her a custom-made pen-and-ink family tree. These tributes were followed by a lively conversation about her career and family.

Special thanks are due to Miss Lansbury, her son and daughter-in-law, Anthony and Lee (Webster) Shaw, and Nancy and John Webster, for making this remarkable evening possible. Lead benefactors included David and Holly Bruce, and additional support was gratefully received from benefactors David H. Burnham, Nancy S. Maulsby, Robert Pemberton and Barbara Jordan, Eric and Susan Schultz, Herbert D. Simons, Susan P. Sloan, Warren Brinson Weeks, Jr., and Justin and Genevieve Wyner.
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Leslie A. Weston
*with contributions from*
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**Special Thanks**
Susan Sloan

Top: Angela Lansbury with Chairman of the Board David H. Burnham and his daughter, Amery Burnham.

Middle: Holly Bruce, Angela Lansbury, and Councilor David A. Bruce.

Bottom (left to right): Anthony and Lee Webster Shaw with Anthony’s mother, Angela Lansbury, accompanied by in-laws Trustee Nancy Clay Webster and her husband, John W. Webster.
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We gratefully acknowledge the following members and donors for making it possible for us to advance the study of family history in America and beyond.

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The Founder’s Society recognizes the generosity of donors who have given $1,000,000 or more to the New England Historic Genealogical Society in their lifetimes.

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*Bold indicates the new members of the Founders’ Society.

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Above: The new streamlined user interface of AmericanAncestors.org is designed to be easily viewed on mobile devices with internet connections.
The John Quincy Adams Society
This Society is named in honor of John Quincy Adams, sixth president of the United States and a member of the New England Historic Genealogical Society in 1845. It recognizes the generosity of individuals who have made cumulative gifts of $500,000 to $999,999 in their lifetimes.

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The Charles Ewer Society
The Charles Ewer Society, names after the founder of NEHGS, recognizes the generosity of those individuals who have given cumulative gifts of $100,000 to $499,999 in their lifetimes.

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The Daniel Webster Society

The Daniel Webster Society, named after the statesman and senator, an early member of NEHGS, recognizes the generosity of corporations, foundations, and institutions that support the New England Historic Genealogical Society with cumulative gifts of $100,000 to $999,999.

Cabot Family Charitable Trust
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Preserved documents at Wells Fargo archives, on the San Francisco Research Tour, 2014. Courtesy of Peter Van Demark.
The Dr. Henry Bond Heritage Society

The Dr. Henry Bond Heritage Society recognizes those friends of NEHGS who have invested in the future of the Society through their estate plans. Dr. Henry Bond, a pre-eminent genealogist known for his work on the history of Watertown, Massachusetts, left NEHGS its first bequest in 1859.

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**Bold** indicates members of the Ashburton Circle, named for the site of NEHGS’s first permanent home, who have given an irrevocable gift to the Society.

*Deceased

Tricia Labbe and Kathleen Mackenzie from the NEHGS member services team.
The Benjamin Franklin Society

The Benjamin Franklin Society recognizes the generosity of those individuals who donated materials to the R. Stanton Avery Collection and made a gift of $10,000 or more to support its long-term care.

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The Cornerstone Society recognizes the generosity of those individuals who made a gift of $100,000 or more to support the purchase and renovation of 97 Newbury Street.

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Member Tom Dreyer perusing one of over 14,000 books available through the NEHGS bookstore.
D. Brenton Simons Capital Fund

On October 24, 2013, a celebratory event, chaired by Trustee Susan P. Sloan, established this fund in honor of the 20 years of leadership, loyalty, and service of D. Brenton Simons. The fund is used to make capital purchases or improvements to the headquarters of the New England Historic Genealogical Society. The following donors contributed a total of $132,575 to the fund.

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Patron visits the R. Stanton Avery collection in the NEHGS library.
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[Image: Patrons making countless discoveries on the seventh floor of the NEHGS library.]

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Mary Alice Yost

NEHGS volunteers Jane Papa, Lois Lober, and Elizabeth Isaac at the annual volunteer luncheon in November 2013.
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Connecting Families. Advancing History.

**Fun Facts** (as of 12/31/14)

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>States in which campaign donors reside (in addition to Washington, D.C., Puerto Rico, 7 Canadian Provinces, and 17 other countries)</td>
</tr>
<tr>
<td>100</td>
<td>Percent increase in searchable records with the launch of the new AmericanAncestors.org</td>
</tr>
<tr>
<td>337,350</td>
<td>Page views in the first year of the popular Vita Brevis blog</td>
</tr>
<tr>
<td>2,144</td>
<td>Pages of fragile and historically important documents rescued in the new NEHGS Conservation Laboratory</td>
</tr>
<tr>
<td>300</td>
<td>Thousands of searchable documents in the digital archives of the American Jewish Historical Society–New England Archives (and 2 million in the queue!)</td>
</tr>
<tr>
<td>119,146</td>
<td>Visits to 99–101 Newbury Street through the new garden and entryway of 99 Newbury Street</td>
</tr>
<tr>
<td>15</td>
<td>Cornerstone Society members supporting the acquisition of 97 Newbury Street with $100,000 or more</td>
</tr>
<tr>
<td>40</td>
<td>Newbury Street Press books undertaken since the start of the campaign</td>
</tr>
<tr>
<td>8,643,583</td>
<td>Millions of visits to AmericanAncestors.org during the Campaign</td>
</tr>
<tr>
<td>33</td>
<td>Percent growth in the NEHGS endowment since the start of the Campaign</td>
</tr>
<tr>
<td>96</td>
<td>Percent of campaign goal reached</td>
</tr>
<tr>
<td>1.2 billion</td>
<td>New records on AmericanAncestors.org</td>
</tr>
<tr>
<td>24,984</td>
<td>New NEHGS Facebook “Friends”</td>
</tr>
</tbody>
</table>

The **Connecting Families, Advancing History, Campaign** is now within $1.3 million of its $55 million goal. Recent accomplishments that philanthropy has enabled include:

- Launch of the new AmericanAncestors.org—mobile friendly and with 425 million searchable records and a powerful search feature
- New front doors and entryway of our national headquarters
- More than 100 successful programs, tours, and events in 2014, including those that honored Doris Kearns Goodwin, Henry Louis Gates, Jr., and Dame Angela Lansbury