



*Hildene exists to carry the values of Abraham Lincoln to future generations.
Our mission is to inspire others to put those Values into Action.*

CASE STATEMENT

Hildene is one of the two or three most important Lincoln sites in the country. While other sites tend to focus on Lincoln as historical giant, we have carved out a different path as the organization focused on carrying Lincoln values into the future. Our three-word mission is Values into Action. Our Core Values are Integrity, Perseverance and Civic Responsibility. While that mission and core values are straight from Abraham Lincoln, we have made them our own. Through our key actions of Preservation, Conservation, Sustainability and Civil Civic Discourse, we make those timeless values relevant to today's world.

Hildene is a Vermont not-for-profit qualified as a 501 (C)(3) tax-exempt organization. It has a thirteen-member board of trustees made up of a diverse group of individuals, some of whom live locally and some of whom live out of state. The board meets quarterly and has three standing committees: Financial Planning, Advancement and Governance. Each trustee serves on one committee.

History

Hildene was the summer home of Robert and Mary Lincoln. Of Abraham and Mary Lincoln's four sons, only Robert survived to adulthood. Successful lawyer, Secretary of War (1881-1885), Minister to England (1889-1893), president/board chair of the Pullman Company, Robert is one of the country's most successful presidential children. In 1902, at the age of 59, Robert purchased the property that was to become his "ancestral home" in Manchester, Vermont. The house was constructed and Robert and Mary spent their first night in the spring of 1905.

Robert was president of the Pullman Company, based in Chicago, from 1897 until 1911, at which point he became chair of the board. Despite the fact he was running the world's largest manufacturing company, Robert and Mary spent a full six months at Hildene each year from spring into fall. This was the place they wanted to be. Robert died at Hildene on July 25, 1926, six days shy of his 83rd birthday. Mary continued to come to Hildene each summer until her death in 1936. Their daughters and grandchildren all spent significant portions of their lives at Hildene, both during and after the lives of Robert and Mary. The last Lincoln to live at Hildene, Mary Lincoln Beckwith, known as Peggy, died in 1975. The not-for-profit Friends of Hildene, Inc. took ownership in 1978.

In addition to his family and his business interests, Robert spent a good deal of his adult life working to ensure his father's legacy was properly shaped. Many hucksters and incompetents attempted to hijack that story for the purpose of self-promotion and financial gain. A careful Robert Lincoln made sure only credible historians had access to his father's papers. This care resulted in the

scholarly work of Lincoln's former White House secretaries, Nicolay and Hay, who established the standard to which others are still held.

Now, the Friends of Hildene picks up Robert's work by carrying the legacy – the values -- of Abraham Lincoln to future generations. We do this both on the 412 acres that constitute Hildene (Hildene as place) and through the higher purpose (Hildene as idea) that is not geographically tethered.

Budget/Monetary Resources

With a budget of \$2,500,000 (+-), Hildene has 32 year-round employees, another 8-10 seasonal employees and sponsors a summer jobs program for 15 (+-) high school and college students. Hildene is able to generate more than half its income from a combination of admissions, Museum Store sales, programs, private functions and the sale of agricultural products. The remainder comes from a combination of annual fund, memberships, grants, etc.

Hildene employs a \$500,000 line-of-credit to help manage cash-flow over the course of the year.

Hildene has \$2,000,000 in endowment and no long-term debt. The first \$1,000,000 of the endowment was built during the first capital campaign (2005 – 2010) by placing \$.13 of every dollar raised into endowment. The second \$1,000,000 has largely come in during this, our second capital campaign.

Education

Education is core to everything we do. Every bit of the routine guest experience carries with it myriad learning opportunities. For instance, the goat dairy is focused on agricultural and ecological sustainability; the Pullman car, Sunbeam, is focused on issues of class and, in particular, the black Pullman porters and racial relations in America from the Emancipation Proclamation forward; and the main house is focused on the role of family and civic engagement. Guests are free to engage as much – or as little – as they desire. Hildene is about educational opportunity, not force-feeding.

We also have a substantial education apparatus in place for young people. We have two child educators on staff year-round. They focus on elementary school groups coming for programming in the areas of natural science, agriculture and hands-on history during the school year and on camps each summer focused on the same areas. We serve nearly 3,500 kindergarten through sixth grade children each year. We also run eight weeks of high-quality summer camps for the same age group. These programs are run out of the Lowerre Family Youth Education Center.

For middle schoolers (grades 7 and 8) we run a statewide essay competition, The Hildene Eighth Grade Lincoln Essay Competition and, in the summer, the Hildene Youth Corps at which team members construct a project of lasting value to Hildene.

We have a deep-seated collaboration with the local high school, Burr and Burton Academy, at Dene Farm. Burr and Burton has a full-time teacher in the Dene with classes focused on plant and soil science, agriculture, ecology, economics and the humanities. We are currently constructing a twen-

ty-first century classroom in one of our nineteenth-century barns to give this program a permanent home. The classroom will be ready for the 2019/2020 school year.

Our summer jobs program for high school and college students includes quiet mentoring with regard to the need to be on time, put in a good day's work, care about your employer and working constructively with others. At the end of the summer, students are educated about saving for retirement and set up with small Roth IRA's.

An opportunity for the next president will be to establish a college internship program in areas like collections care, private function coordination, marketing, agriculture, etc.

Environmental Ethic

One of our core values is civic responsibility. One of our key actions is to operate in a sustainable manner. The goat dairy has 109 solar panels to help power the operation. We heat most of our buildings with wood-burning furnaces. We practice rotational grazing with our agricultural operations in order to improve the soil. To the extent we use any pesticides anywhere on the property, we use only organics and only in accordance with a comprehensive management plan developed by our staff horticulturalist. If that means the lawns have weeds, well, it means the lawns have weeds. It also means that parts of lawns might not get mowed at different times of the year to allow bees and butterflies to forage on dandelions. The lawn on one end of the Lowerre Family Youth Education Center is dedicated as a pollinator lawn, so it is planted with wildflowers, etc. and mowed only to four or five inches. We do not brush-hog some meadows, or parts of meadows, until late October so that they can serve as habitat/food source for pollinators spring, summer and fall. We plant pollinator gardens.

Although we do harvest timber, both for our own use (we have a sawmill) and to sell, our forest management plan has as its highest purpose to provide habitat for birds. In short, we try to model excellent environmental stewardship across the entirety of the property. We do not preach our environmental ethic, we live it and we give people the opportunity to see it in action. This has the added benefit of people gaining a sense that there is something very special going on here.

We do not sell bottled water because we do not want to promote plastic waste. We do not allow caterers to use plastic plates, cups, silverware or, again, serve bottled water. Even when we have staff gatherings and food is served we use china plates, real silverware, glass glasses, etc. We believe you can't have it both ways; if we are going to have credibility promoting an environmental ethic, we have to live it.

Visitors

Seventeen years ago (2002), when the current generation of leadership came to Hildene, attendance had been declining for eight years at an annual average of seven or eight percent. We began Hildene's first ever capital campaign in 2005; the same year that attendance bottomed out at 19,000. Through a combination of remaining open year-round, restoring the Welcome Center,

restoring the formal gardens, adding the Pullman Car, adding the goat dairy, maintaining our walking trails and professionalizing our delivery of the visitor experience, we have steadily increased visitorship. We achieved a high of more than 42,000 in 2017. Visitorship now generates nearly one-third of our budget.

Once again, the guest offerings have been expanded with the entirety of the Dene – 600' floating boardwalk, perimeter path, greenhouse, animals in a new barn, etc. – coming on-line. This development of the lower half of our property takes Hildene from a half-day experience to a full-day experience and sets up the need for the final elements of the current capital campaign (discussed below).

Standing in the World/Local Importance

If one is going to Ashville, North Carolina, it is almost a certainty that they will visit the Biltmore. It is also not unlikely that the reason they are in Ashville in the first instance is to go to the Biltmore.

Hildene is the Biltmore of the Shires of Vermont (Bennington County). We know from our internal surveys that a little more than half the people who visit Hildene are in the area specifically to come to Hildene. The others are sent by our lodging partners or other friends.

Between our payroll, the room nights and restaurant seats filled by our 42,000 daytime guests, plus several thousand more wedding guests, our construction projects, our purchase of farm supplies, etc. we directly inject nearly \$6,000,000 annually into the local economy. The standard 2.5% multiplier increases that number to \$15,000,000.

Part of the reason we are able to provide the impact we do locally is because of our international standing as a must-visit Lincoln site. This standing has been carefully cultivated via our brand and our mission, two of our most important assets.

Employees

Employees are not your most important asset; the right employees are your most important asset. Hildene President, Seth Bongartz, paraphrasing Jim Collins, author of Good to Great.

Management has taken great care in hiring staff. Our 32 year-round employees are bright, passionate about Hildene's mission, friendly, supportive of each other professionally and personally and, for those reasons, highly effective. Many have been here for more than a decade and, for many, Hildene is a fulfilling career.

In addition to year-round staff, Hildene brings on another 10-12 employees from June through October to help with driving trams, serving as docents and perhaps in the Welcome Center. We also have a summer jobs program that employs 10 – 15 high school and college students across the property.

Every member of the staff understands that they are Hildene ambassadors. Because of their passion for the mission they embrace that role. When guests make comments either in our welcome

center registry or on social media, they invariably reference the staff as one of the reasons their visit was memorable.

Volunteers

In addition to our paid staff, we have a cadre of 80 – 100 volunteers who loyally fill jobs everywhere from the Plant-A-Row for the Hungry garden, to docenting at the main house and the Pullman car to helping at the goat dairy, in the archives, helping to decorate the house for Christmas to other jobs and places across the property. Often, they volunteer a half day a week, but there are plenty of variations on that norm.

Board of Trustees

We have a board of trustees (currently 13) that is diverse both geographically and in experience. The board is involved in establishing/monitoring successful achievement of mission, vision and major goals. The board is also responsible for ensuring that the organization has the resources to meet its mission. It is important for the President and the Board to have a good working relationship.

Legacy Society

In 2011 Hildene launched a formalized Legacy Society for individuals and couples who have made provision for Hildene in their estate plans. We now have 80(+) members. Over the course of the last seventeen years, even without a formalized Legacy Society for much of that time, Hildene has received on the order of fifteen bequests, ranging in size from \$11,000 to \$2,500,000. The average has been \$300,000(+). Although we have not yet been able to do so because of immediate needs, the long-term goal is to place funds that come in through the Legacy Society into endowment.

Hildene as Place

Hildene consists of the entirety of the parcel put together by Robert and Mary Lincoln plus 20 acres (+-) acquired by their granddaughter Peggy Lincoln Beckwith during her tenure at Hildene. There are fourteen historic buildings, including the main house, the welcome center, two eighteenth-century farmhouses and two nineteenth-century barns. We have also added seven new structures over the course of the last fifteen years: the Lowerre Family Youth Education Center, the goat dairy, the building housing our 1903 wooden Pullman car, the Pavilion (used for a variety of purposes such as cross-country skiing in the winter and bus group lunches in the summer), our teaching greenhouse in the Dene, our Dene Farm animal barn and a building to service our seasonal private function tent.

In terms of guest experience we have five major venues – all connected under the mission umbrella: The Welcome Center (located in the Lincoln's beautifully restored carriage barn), the main house and accompanying gardens, our Pullman car (Sunbeam), the goat dairy (at which we milk goats and make cheese), Dene Farm (our second agricultural operation, complete with teaching greenhouse, animal barn and pastures and 600' floating wetland boardwalk) and the entirety of our twelve miles of walking trails (open for cross-country skiing and snowshoeing in the winter).

We are open 9:30 – 4:30 year-round. We close only five days a year. In 2017 we had 42,000 visitors. This number does not include school groups or wedding guests.

Because the potential guest experience incorporates all 412 acres and because little at Hildene is static, this is a place at which repeat guests can find new experiences with each visit.

Private Functions

We host between 30 – 35 weddings each year between Memorial Day weekend and the middle of October. We also host corporate dinners and similar functions during the same time period. We have a staff of 1.5 FTE's who book/work with couples and oversee events. We are working to bring these weddings and dinners more fully under the mission umbrella by, for instance, hosting daytime guided hikes for wedding/corporate guests and serving food produced at our agricultural operations.

Agriculture

Hildene has two agricultural operations, the goat dairy on the “upper” level and Dene Farm in the Dene. At the goat dairy we milk goats and make cheese. We involve a lot of young people in a lot of ways at the goat dairy. Dene Farm consists of everything from animals (alpaca, sheep, cattle, pigs, chickens and rabbits) to a teaching greenhouse, to vegetable gardens to an orchard to the keeping of bees. Everything produced at Dene Farm has a purpose: we sell vegetables to our caterer, we produce and then sell yarn from our alpaca fleece and lamb's wool, we sell meat from the pigs and cattle and eggs from the chickens. All of this is laced with students and youth summer employees.

Hildene as Idea

Hildene, the place, is interesting, dynamic and full of opportunities. Hildene the idea goes beyond place to carrying Lincoln's values, now our values and our key actions, to the wider world. We have focused most of our efforts to date on building the foundation of place, but there are shoots of idea in, by way of example, our Last Best Hope program which involves our annual presenter going into area schools to help students see the fulfillment that comes with being involved in something larger than oneself. The Eighth Grade Lincoln Essay Competition is about Hildene as Idea.

The largest opportunity for creativity on the part of the next President may be about truly bringing to life the notion of Hildene as idea. One opportunity may be to focus on bringing civil civic discourse back to the public square. Other ideas might be focused on the teaching of civics; using Hildene – and our focus on civil civic discourse -- as a place to bring people of divergent views together for the development of public policy; or, perhaps, to run a month-long seminar each summer for high school students to work with excellent teachers to study Lincoln as a model of leadership.

Because we have established ourselves in the eyes of the world as a major Lincoln site, we have instant credibility as both an exemplar and keeper of Lincoln values and, therefore, almost an obligation to carry them forward. It is important to keep elements of Hildene as Idea front and center even as we continue to put in the place the next critical elements of Hildene as Place.

The Next Pieces

Hildene is currently in its second-ever capital campaign. The key achievements of this second campaign so far have been to bring the Dene – the lower half of Hildene’s property – fully to life, to add to endowment and to complete extensive work with architects and engineers for the next elements.

The Dene, formerly almost fallow and disconnected from the guest experience, now has the finest teaching greenhouse in the State of Vermont, a 600’ floating boardwalk in our Battenkill wetlands, two and a half miles of high-quality pasture fencing for our animals, a maintained perimeter path, a new animal barn and a twenty-first century classroom in one of our nineteenth-century barns. It is a beautiful part of the property that effectively turns Hildene from a half-day guest experience to a full-day experience. The major parts of the Dene are now in place.

Second, the current campaign allowed us to rewire the main house. We have raised the funds and have scheduled a contractor to install new shingles on the main house roof.

Third, the campaign has increased endowment.

Two major elements of the campaign still to come are Lincoln Hall, a beautiful, year-round building to replace the wedding tent and the Greenhouse Café, a teaching restaurant at which guests will have lunch and high school students will learn about food preparation and food service. A third project, not of the same scale, but vitally important, is a second, or overflow, parking lot.

These three elements will further tie Hildene together. Hildene is like a college campus and Lincoln Hall will provide the central assembly space now lacking. It will also make possible weddings and corporate meetings and dinners year-round. The Greenhouse Café, so named because it will have a small greenhouse attached from which students and the chef can gather fresh ingredients, will give day-long visitors a place to eat a quality lunch with many ingredients coming from the property. It will also include a catering kitchen in the basement, a classroom for high school students and a main kitchen designed and built for teaching. It is an obvious need; any world-class cultural heritage site must provide food service equal in quality to the rest of the experience.

These last three elements, Lincoln Hall first, followed by the parking lot and with the campaign closed out with the Greenhouse Café, will take Hildene to the level of world-class cultural heritage site. It may take time, but it is within reach and worth the effort. It will be the responsibility of the next President to accomplish and bring to life these remaining elements of the capital campaign.