



ROYAL OAK
FOUNDATION

ANNUAL REPORT 2019-20



The Royal Oak Foundation seeks to raise awareness of and advance the work of the National Trust of England, Wales, and Northern Ireland by inspiring support from the United States for the Trust's efforts to preserve and protect historic places and spaces—forever, for everyone.





LETTER FROM THE EXECUTIVE DIRECTOR

Dear Royal Oak Community:

On behalf of the Royal Oak Board of Directors and staff, we are pleased to present our annual report for 2019-20. In 2019, the Board decided to change the fiscal year to a July-June reporting cycle. Therefore, this annual report covers the 18-month period from January 2019 through June 2020.

In 2019, thanks to the generous support of Royal Oak members and friends, over \$250,000 was donated to preserve and protect the historic library at Blickling Hall, a Jacobean manor house in Norfolk in East Anglia. This extraordinary library, one of the most important in the care of the National Trust, faced deteriorating environmental conditions that threatened the books as well as the infrastructure of the library. Our grant made possible critical repairs and enabled the Trust to catalog this priceless collection to make it available to a wider audience.

Membership, the cornerstone of our organization, remained consistent for renewals. However new members expanded by 20% over the prior year as we witnessed an increasing interest in travel to the UK and British heritage.

We capped the year off with our annual gala in October and honored the Duke of Devonshire for his contribution to the preservation of British culture and the ten-year restoration of Chatsworth. Guests enjoyed a reception and dinner at the Century Association in New York City, where Sir David Cannadine engaged the Duke in a lively discussion about his work at Chatsworth.

As 2020 began, we looked forward to celebrating the 125th anniversary of the National Trust and embarking on our campaign to raise \$250,000 for Fountains Abbey and Studley Royal Water Garden in North Yorkshire, together a World Heritage site, that is contending with severe flooding from the River Skell, both the heart of the site and now its greatest threat.

However, by mid-year, the world had changed. The spread of coronavirus closed borders and travel on a scale that had never been seen before. In what should have been a year for jubilation, the National Trust was forced to close all its properties. Here in the US, Royal Oak cancelled all member trips, as well as our in-person programming. Nevertheless, thanks to video technologies, we were able to conduct live virtual programs, with a limited time rental option. As a result, attendance was robust, often with several hundred attendees per lecture. Though we hope to return to in-person events soon, we will continue to offer online programming so all Royal Oak members can enjoy this benefit.

We want to thank our members for their continued loyalty and support of the National Trust and The Royal Oak Foundation during these difficult times.

Respectfully,

Lynne Rickabaugh
Chairman

Ian Murray
Executive Director



KEY FIGURES AND FUN FACTS

At the end of June 2020, Royal Oak had
9,900 members

The top 5 places in the US with Royal Oak members are
*New York, Washington DC, Chicago, San Francisco,
Philadelphia & Los Angeles*

Royal Oak members have been members for

<i>1-5 years:</i>	<i>35%</i>
<i>6-10 years:</i>	<i>24%</i>
<i>11-20 years:</i>	<i>19%</i>
<i>21-25 years:</i>	<i>8%</i>
<i>25+ years:</i>	<i>14%</i>

Members made

11,545 visits to National Trust properties

The most popular were

*Attingham Park, Sissinghurst Castle Garden,
Hidcote Manor Garden, Snowhill Manor and Garden,
Hardwick Hall, Fountains Abbey and Studley Royal Water
Garden, Anglesey Abbey, Lacock Abbey,
Standen House and Garden*

In 2019, 822 memberships were purchased at 122 National
Trust properties. 42% of those purchases were at just 4 properties

*Hidcote, Sissinghurst,
Giants Causeway, Carrick-a-Rede*





MEMBERSHIP

Royal Oak's mission is to raise awareness of and advance the work of the National Trust of England, Wales, and Northern Ireland by inspiring support from the United States for the Trust's efforts to preserve and protect historic places and spaces—for ever, for everyone.

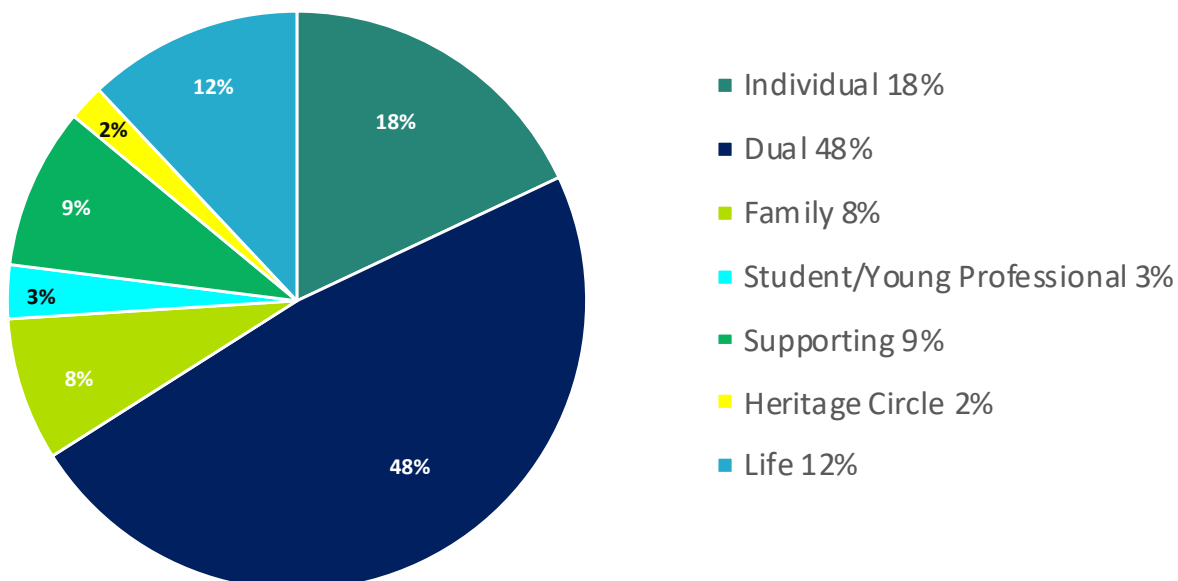
Essential to the success of that mission is the enduring participation of our members. We are very grateful to the approximately **10,000 active members** who continue to share with us not only their financial support, but also their enthusiasm and loyalty. More than **40% of them have been members for 10 years or more**. Our members hail from all across America, Canada, Europe and Great Britain; but they all have one thing in common: a love of the United Kingdom and the historic properties under the stewardship of the National Trust.

Thank you for being a vital part of the Royal Oak community!



The south range and moat at Little Moreton Hall, Cheshire ©National Trust

MEMBERSHIP BY CATEGORY AT JUNE 2020





HERITAGE CIRCLE

The Heritage Circle was created for individuals who wish to show their leadership and support of Royal Oak on an annual basis. Heritage Circle members enjoy special behind-the-scenes access to heritage sites, private meals and curated tours.

One popular tour benefit offers members two complimentary spaces on the annual U.K. Study Day in the fall, which features a dinner in London for our Guardian and Patron level members. Another attractive benefit is eligibility to participate in our spring Houses and Gardens Tour.

In 2019, our UK Study Day welcomed 18 Heritage Circle members and some National Trust colleagues for private, curated tours of Arundel Castle and Petworth House.

Our 2019 spring Houses and Gardens tour featured the “Treasures of Somerset”; Bath, Great Chalfield Manor, Wells Cathedral, Montacute, Glastonbury Tor and Tyntesfield were just a few of the historic places we explored.

Our spring 2020 tour to Hampshire, Wiltshire and Dorset was postponed due to the COVID pandemic.

Heritage Circle Membership in figures:

There are a total of **78** Heritage Circle members.

Income from Heritage Circle Membership dues since inception in 2006: **\$1,505,636.**

Photos top to bottom: Heritage Circle members at Hauser & Wirth in Somerset; Heritage Circle members on a walking tour near Wells Cathedral, Statuary from trip to Rome.





HERITAGE CIRCLE MEMBERS

PATRONS

Michael J. Brown
Constance M. Cincotta
Anne and Dan Ervin
Pamela K. and Roger Hull
Eric Nilson, S. Jeffrey Mostade and
Varun Shetty
Lynne and Mark Rickabaugh
John Turner and Jerry Fischer

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Jennings
Susan and William Samuelson
Mr. and Mrs. Richard C. Spain
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The Honorable Ambassador and Mrs.
Victor H. Ashe
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Mrs. Melanie Boltax
Charles N. Brower and Shirley K. Kent
Susan S. and David O. Brownwood
Mr. and Mrs. Willard Bunn III
Prof. Sir David N. Cannadine and
Prof. Linda Colley
Sarah D. Coffin and Thomas E.
O'Connor
Lt. Col. and Mrs. Jeffrey S. Farnquist
(Ret.)
Mr. and Mrs. Edgar L. T. Gay
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Rebecca Jessen and Tuck Forsyth
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Morrissey
Brenda Neubauer Straus

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JoAnn Tredennick and Jack L. Meeks
Laura Trevelyan and James Goldston
George Triantaris and Steve Nigzus
Renee and Alan Tucei
Mr. and Mrs. Raymond Weiss
Lois S. Wolf
Mr. and Mrs. Klaus P. Zech
Anonymous (2)





PROGRAMS & LECTURES

JANUARY 2019 - JUNE 2020 LECTURE SEASONS

Royal Oak's humanities programs are a fundamental part of The Foundation's educational mission to deepen appreciation of Anglo-American heritage in the United States, while fostering a greater awareness and raising support for the British National Trust's historic preservation initiatives.

Since 1974, Royal Oak has offered a series of public lectures, which brings respected historians, noted scholars, best-selling authors, and designers to speak to audiences across the United States. These talks cover the history of architecture and design; British and American historical events and social history; English literature and language; and landscape and garden design.



Members on a tour of the Mario Buatta Estate exhibit at Sotheby's.

From January-December 2019, Royal Oak presented 23 speakers who gave 54 public humanities lectures in 11 different cities; and held 20 tours—reaching approximately 4,635 in-person attendees. Highlights include lectures on Elizabethan spies and ciphers; lectures on Winston Churchill's correspondence; talks about Arts & Crafts gardens; a presentation about the history of Kiftsgate Garden by the owners; actor Simon Jones' talk about his experience playing George V in *Downton Abbey: The Movie*; Emma Manners, The Duchess of Rutland, speaking about her life and the restoration of Belvoir Castle; a tour of the apiary on the Javits Center green roof; a walking tour of Edith Wharton's NYC and other events across the US.

From January-March 2020, Royal Oak held six in-person events in four cities with 510 attendees. During March and April, Programs Department staff cancelled the remaining 30 scheduled Spring events due to the pandemic. Unable to hold in-person cultural events due to safety guidelines, the department looked for creative ways to engage current and potential U.S. public audiences. They transformed Royal Oak's educational programming to a digital platform allowing, for the first time, world-wide access to all of ROF's lectures and tours. Staff combined these live virtual lectures with tickets for limited replay or "Rental" of the recorded lecture.

From late April-June 2020, Royal Oak Programs presented nine virtual events with 2,561 attendees. Our first digital event doubled the average registration of an in-person live lecture in a major city, and had audience attendees from 261 cities in 36 states (including Alaska and Hawaii), plus attendees from 5 other countries. Royal Oak also provided a free lecture for members by BBC Correspondent and ROF Board member Laura Trevelyan called Wallington House and Langdale Valley: The Trevelyan Family's Legacy.

These new digital events have allowed the Foundation to continue its educational mission, engage current audiences as well as reach previously inaccessible attendees located in non-lecture cities and potential members unfamiliar with the organization.



NATIONAL TRUST APPEAL

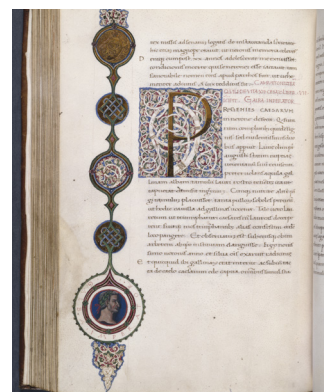
THE LIBRARY AT BLICKLING

The 2019 Royal Oak National Trust appeal supported the restoration of the library at Blickling Hall and made its collection better known to the public. Our appeal raised over \$250,000 to stabilize the structure, provide needed climate control and catalog the many important books in the library.

Blickling's library is one of England's foremost private book collections. It is also the largest and most important National Trust's library, making the collection one of exceptional national and international significance. Acquired in 1742, it contains more than 12,500 volumes, including some very early and rare works.

The library faced serious damage both to its infrastructure and its books due to leaks, mold and pests like the deathwatch beetle. Urgent structural work was needed to remedy the dire situation. Further efforts to protect the books themselves included insulating the book presses and creating appropriate environmental controls that provided a thermal buffer and prevent menacing micro-climate conditions beyond the structure.

Another important goal was to make the public more aware of Blickling's extraordinary collection. Among the rare books held in the library are the first complete Bible to be printed in English, as well as first editions of Jane Austen's *Sense and Sensibility* and *Emma*. The librarian will describe the potential damage to the books and the historical importance of the collection.



Top to bottom: Blickling Estate; book from the Blickling library showing damage from pests; other volumes in the collection. ©National Trust



HISTORICAL GRANTS TO NATIONAL TRUST

HOUSES & CASTLES

- 1** 575 Wandsworth Road
- A1** A la Ronde
- A2** Ashridge Estate
- A3** Avebury
- B1** Barrington Court
- B2** Belton House
- B3** Biddulph Grange
- B4** Blickling Estate
- B5** Buckland Abbey
- C1** Calke Abbey
- C2** Canons Ashby
- C3** Castle Coole
- C4** Castle Drogo
- C5** Castle Ward
- C6** Chartwell
- C7** Chedworth Roman Villa
- C8** Cherryburn
- C9** Chirk Castle
- C10** Clandon
- C11** Clouds Hill
- C12** Cragston
- C13** Crom Estate
- C14** Croome Court
- D1** Damley Mausoleum
- 2** Dorset Gardens
- D3** Dudmaston
- D4** Dyrham Park
- F1** Fountains Abbey & Studley Royal
- G1** Giant's Causeway
- G2** Godolphin
- G3** Great Chalfield Manor
- G4** Greenway
- H1** Hadrian's Wall




- H2** Ham House & Garden
- H3** Hardwick Hall
- H4** Hatchlands Park
- H5** Hidcote Manor Garden
- H6** Hill Top
- I1** Ickworth
- I2** Ightham Mote
- K1** Kedleston Hall
- K2** Kingston Lacy
- K3** Knightshayes Court
- K4** Knole
- L1** Lamb House
- L2** Lanhydrock
- L3** Llyndy Isaf Farm
- L4** Lyme Park
- M1** Monk's House
- M2** Mottisfont Abbey
- M3** Mount Stewart
- N1** Nostell Priory Stables
- N2** Nuffield Court
- N3** Nymans Garden
- O1** Oakhurst Cottage
- P1** Penrhyn Castle
- P2** Plas Newydd
- P3** Powis Castle
- Q1** Quarry Bank Mill
- S1** Sandham Memorial Chapel
- S2** Seaton Delaval Hall
- S3** Sheffield Park Garden
- S4** Shugborough Estate
- S5** Sissinghurst Castle Garden
- S6** Standen
- S7** Stourhead
- S8** Stowe Landscape Gardens
- S9** Studland Beach & Nature Reserve

- T1** Tatton Park
- T2** Textile Conservation Studio
- T3** Ty Mawr Wybrnant
- T4** Tyntesfield
- W1** Waddesdon Manor
- W2** Wallington
- W3** Washington Old Hall
- W4** West Wycombe
- W5** Westbury Court Garden
- W6** Wimpole Estate
- W7** Wimpole Home Farm

COUNTRYSIDE

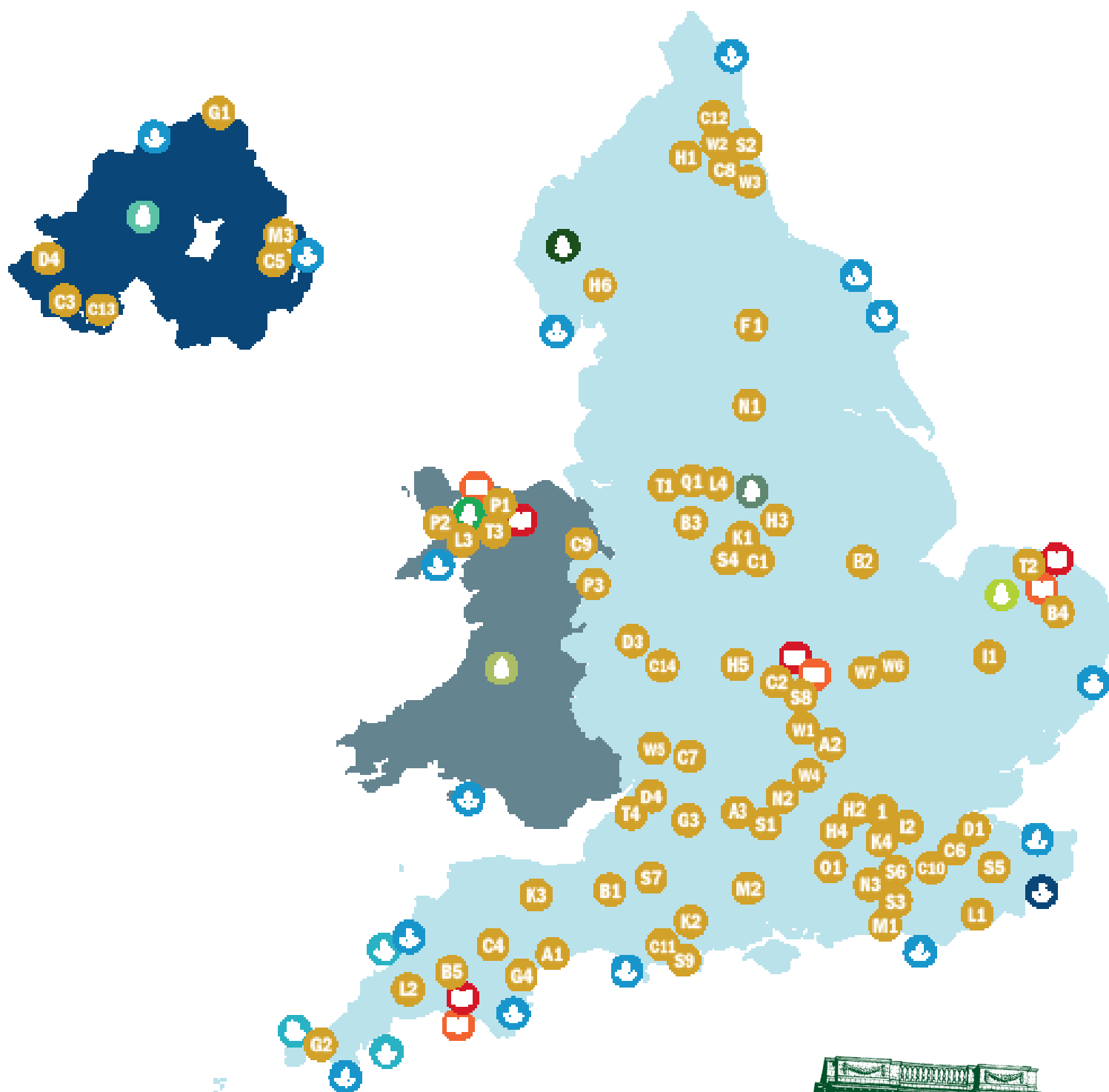
-  Lake District
-  Peak District
-  Wales
-  North Ireland
-  Snowdonia National Park
-  Norfolk Region

COASTLINE

-  Neptune Coastline Campaign
-  White Cliffs of Dover
-  Cornwall Coastal Walk

EDUCATION & LIBRARIES

-  Country House Libraries
-  Minerva Campaign





OTHER GRANTS TO NATIONAL TRUST

2019-2020 SIGNIFICANT GRANT SUMMARY



CHURCHILL PAINTING STUDIO

Donor Designated Grants (multi-year)
\$60,000



SNOWHILL MANOR

Donor Designated Grants
\$25,000



WELLINGTON MONUMENT

Donor Designated Grants
\$20,000



BATEMAN'S

Donor Designated Grants
\$50,000



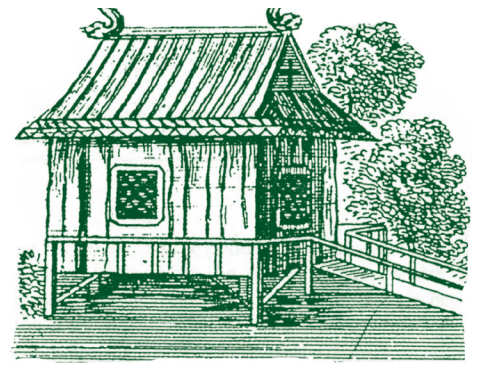
INTERNATIONAL NATIONAL TRUST ORGANIZATION

AMEX Foundation Grants
\$35,000



LAKE DISTRICT

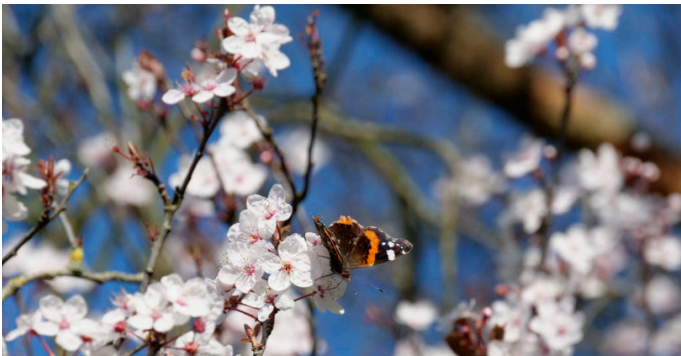
Thompson Fund
132,000



MAPPING NATIONAL TRUST SCULPTURES
The Kress Foundation (multi-year)
\$20,000



NATIONAL TRUST GENERAL SUPPORT
Donor Designated Grants
\$23,500



GARDEN APPRENTICESHIP PROGRAM
Donor Designated Grants
\$21,700



BATH PRIOR PARK
Donor Designated Grants
\$40,000

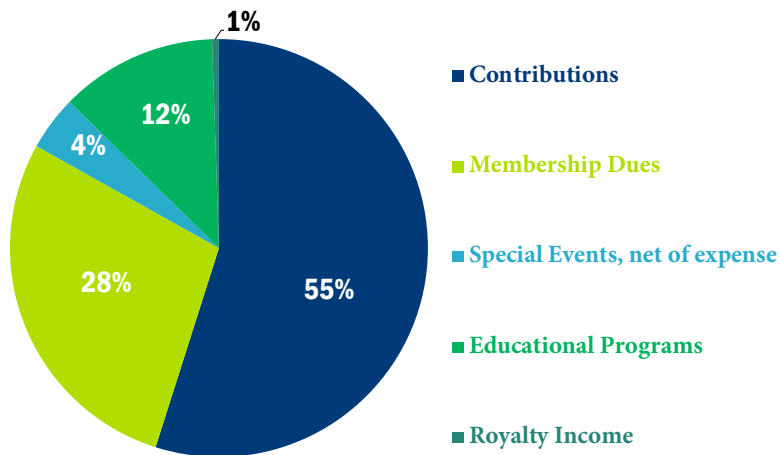


STOWE GARDENS
Donor Designated Grants
\$20,600

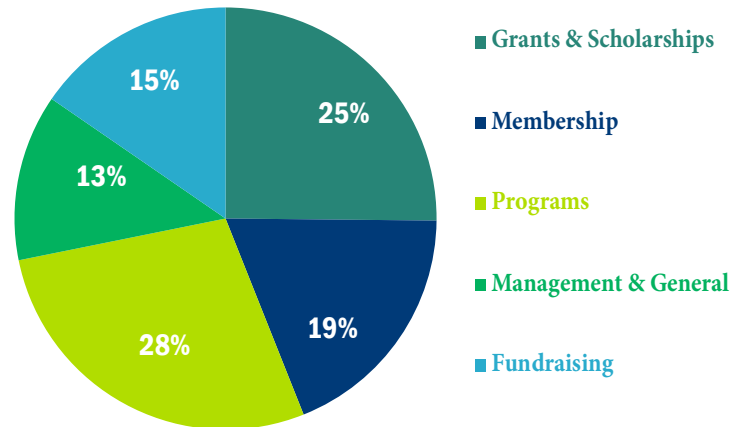


FINANCIAL SUMMARY

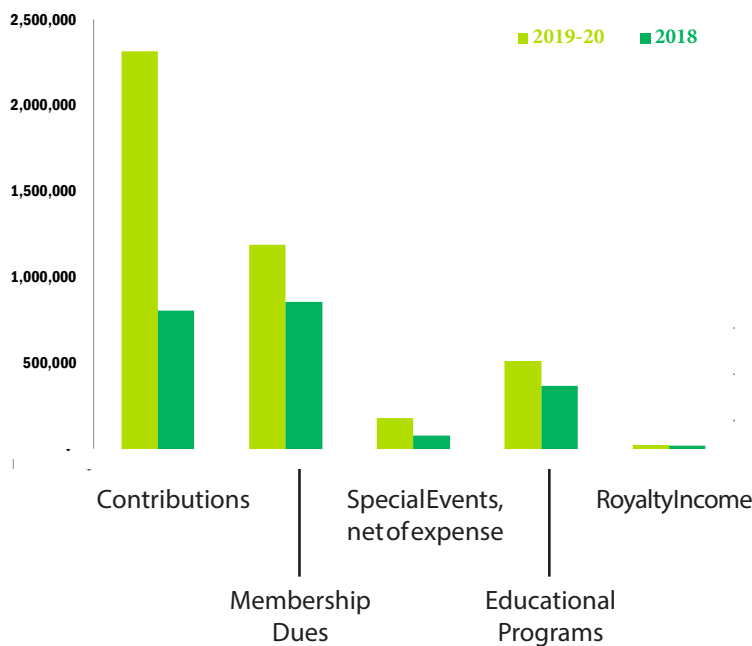
SUPPORT & REVENUE



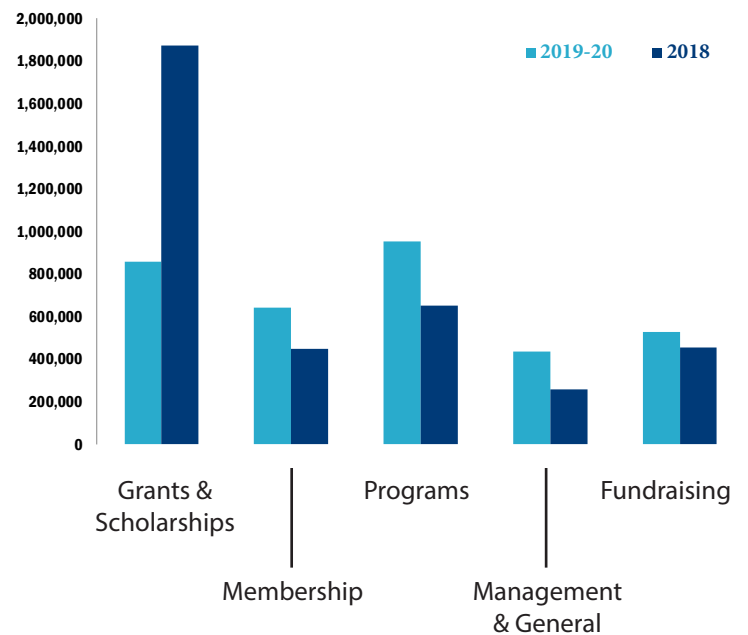
EXPENSES



INCOME 2018 & 2019-2020



EXPENSES 2018 & 2019-2020





FINANCIAL SUMMARY

STATEMENTS OF FINANCIAL POSITIONS

ASSETS	2018	2019-20
Cash and cash equivalents (Notes 1b and 4)	\$318,408	\$236,985
Investments (Notes 1c, 1d and 5)	6,988,669	9,492,226
Accounts receivable (Note 1e)	42,923	28,890
Unconditional promises to give (Notes 1f and 6a)		
Without donor restrictions	4,700	45,853
With donor restrictions	15,000	87,508
Interest in charitable remainder trusts (Notes 1c, 1g and 7)	198,464	210,305
Prepaid expenses and other assets	57,877	81,200
Cash surrender value of life insurance (Note 8)	39,818	42,183
Security deposit	20,276	20,276
Property and equipment, at cost (net of accumulated depreciation) (Notes 1h and 9)	82,383	29,459
TOTAL ASSETS	\$7,768,518	\$10,274,885
LIABILITIES & NET ASSETS	2018	2019-20
Liabilities		
Accounts payable and other current liabilities	106,918	65,278
Grants payable (Note 1i)	29,580	252,524
Deferred revenue (Note 1j)	22,193	47,670
Deferred rent (Note 1 k)	13,756	35,803
Loan Payable (Note 1l)		147,375
TOTAL LIABILITIES	\$172,447	\$548,650
Commitments (Notes 13, 14 and 15)		
Net Assets (Note 3)		
Without Donor Restrictions		
Operating	743,282	1,675,154
Board designated	5,719,720	6,570,621
Total without donor restrictions	6,463,002	8,245,775
With Donor Restrictions		
Subject to time and purpose restrictions	1,024,211	1,371,602
Perpetual in nature	108,858	108,858
Total with donor restrictions	1,133,069	1,480,460
TOTAL NET ASSETS	\$7,596,071	\$9,726,235
TOTAL LIABILITIES & NET ASSETS	\$7,768,518	\$10,274,885

STATEMENTS OF ACTIVITIES

REVENUE, GAINS & SUPPORT	2018	2019-2020
Contributions	2,142,540	2,573,415
Membership dues	854,092	1,188,792
Fundraising benefit	137,723	209,526
Less: direct expenses	(62,484)	(31,640)
Educational programs	367,730	511,864
Royalty income	17,343	22,298
Net investment income	125	130
Increase in cash surrender value or life insurance	1,345	2,365
Other income	5,442	4,939

TOTAL REVENUE, GAINS & SUPPORT	\$3,463,856	\$4,481,689
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EXPENSES	2018	2019-2020
Program services		
Grants and scholarships	1,873,078	858,759
Membership	448,626	642,067
Programs	650,059	951,053
Total Program Services	\$2,971,763	\$2,451,879
Supporting Services		
Management and general	257,899	435,683
Fundraising	453,075	526,045
Total Supporting Services	\$710,974	\$961,728

TOTAL EXPENSES	\$3,682,737	\$3,413,607
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OTHER REVENUE & EXPENSES	2018	2019-2020
Value of interest in charitable remainder trusts	(31,302)	11,841
Contributions - non-operating	764,036	120,165
Appropriation to operations and grants	(1,344,208)	(264,036)
Net investment income	(445,152)	1,194,112

TOTAL OTHER REVENUE & EXPENSES	\$1,056,626	\$1,062,082
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Increase in net assets	(1,275,507)	2,130,164
Net Assets, beginning of year	8,871,578	7,596,071
NET ASSETS, END OF YEAR	\$7,596,071	\$9,726,235



ANNUAL DONORS

The Royal Oak gratefully acknowledges the following donors for their contributions from January 1, 2019 - June 2020 in support of all aspects of the Foundation's mission.

\$100,000+

Estate of Charles John Stuart Allan
Estate of Rosalind Freeman
Estate of Judith Heath
Anonymous (1)

\$50,000+

Constance M. Cincotta
Anne and Dan Ervin
Richard A. Karp Charitable
Foundation
Estate of Lloyd J. Rhodes
Lynne and Mark Rickabaugh
Estate of Elizabeth Terry
Anonymous (1)

\$25,000+

American Express Charitable Fund
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Michael J. Brown
Julie and Robert Daum
Tracey Dedrick and Alastair Merrick
Mrs. Pamela K. Hull
John A. Jones
Mr. and Mrs. George B. Kelly
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Sonia Raiziss Giop Charitable
Foundation
John Turner and Jerry Fischer

\$10,000+

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Shetty
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Sowler
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Greenfield
The 1772 Foundation
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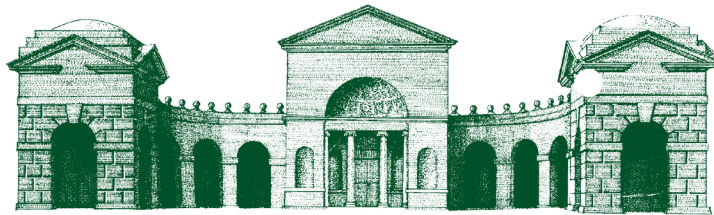
\$5,000+

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Troy B. Marden

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Marilyn Ross Miles and Stephen
Warren Miles
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Elise Meslow Ryan and Reade Ryan
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\$2,500+

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Mrs. Ashe
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Mr. and Mrs. Randall Barbato
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Pauline H. Brooks
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Mr. and Mrs. David O. Brownwood
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 Peter Parham and Frances Brodsky
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 Mrs. Mary S. Treyz
 Mr. and Mrs. Stephen K. Tyler
 Rebecca Wallis
 Mr. and Mrs. John Webster
 Dr. and Mrs. John Wilson
 William Lee Younger, Jr.*
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\$1,000+

Mr. and Mrs. Stanford M. Ackley
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 Ms. Melody L. Allen and Mr. Jeffrey
 Vale
 Mr. Edward C. Anderson and Ms.
 Beatrice R. Cromwell
 Prof. and Mrs. Robert Bartels
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 Joan L. Baxter
 Emily and David C. Beal
 Mr. William B. Bissell and Mr.
 Raymond Ricketts
 Robert and Esther Black Family
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 Richard L. Blanton and Candace H.
 Haigler
 David and Daphne Bogosian
 Melanie Boltax

John and Bonnie Boyd
 Harold H. Brayman and Marita Ott
 Priscilla Brewster
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 O'Connor
 Mr. Paul M. Coopersmith
 Mr. John Crees
 Dr. and Mrs. Kenneth R. Cummings
 Ms. Barbara M. Deacon
 The Duke of Devonshire
 Ms. Susan Drews
 Mr. Albert F. Emmons
 Mr. Richard P. Evans
 Lt. Col. and Mrs. Jeffrey S. Farnquist
 (Ret.)
 Shelley L. Fleetwood and James. J.
 Gusek
 Mr. Ronald L. Fleming
 Profs. Kate Flint and Alice Echols
 Mrs. Rebecca Fonner
 The Julio R. Gallo Foundation
 Ms. Carolyn Gill and Ms. Pauline
 Calkin
 Mr. and Mrs. John T. Golitz
 Mr. James B. Gordy
 Mr. and Mrs. Francis Goudie
 Mr. William H. Greer, Jr.
 Susan Sweetland Grimes
 Mr. John Gwynne, Jr. and Mr. Mikel
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 Virginia Hamister and Dick Durfee
 Dr. and Mrs. Mark A. Hardin
 Mr. and Mrs. David R. Harvey
 Ms. Elizabeth Herridge
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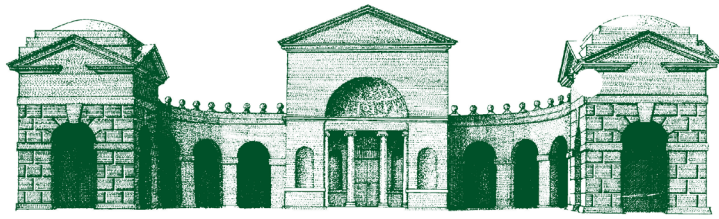
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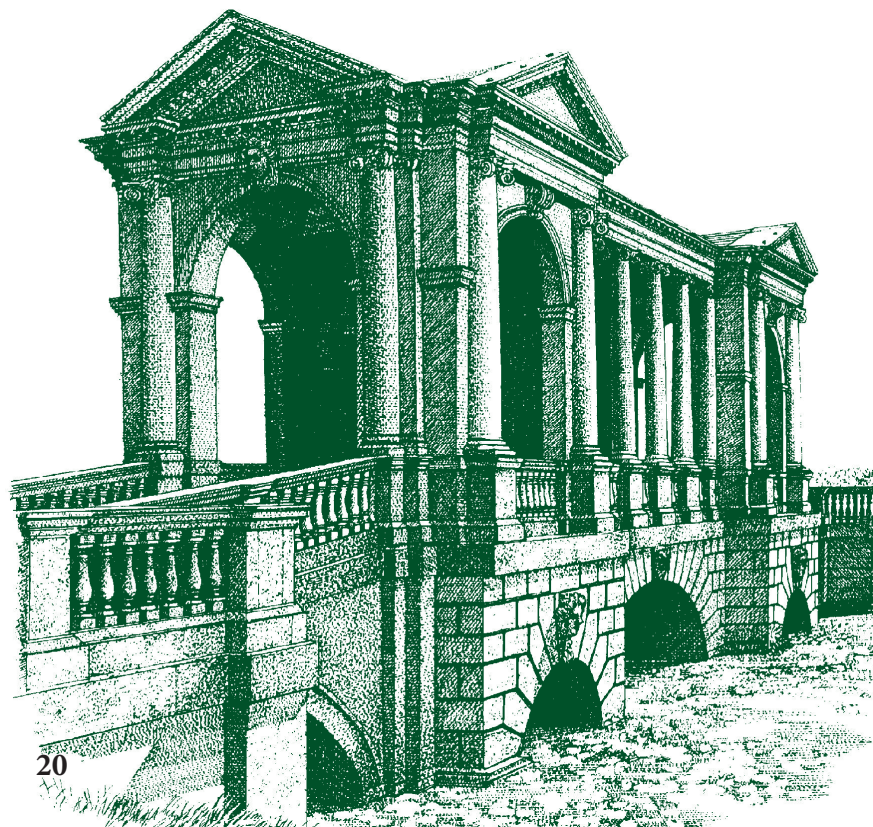
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TIMELESS BENEFIT DINNER

On November 6, 2019, The Royal Oak Foundation held its annual Timeless Benefit Dinner at the Century Association in New York City, where National Trust Director-General, Hilary McGrady, acted as honorary benefit chair.

Guests enjoyed a lively conversation between Sir David Cannadine and the Duke of Devonshire, who was honored in recognition of his contributions to the preservation of British culture and the 10-year restoration of Chatsworth.

One of the great treasure houses of Britain, Chatsworth has been home to sixteen generations of the Cavendish family. The house is renowned for its architecture, gardens and art collection.

The art collection, one of the greatest in all of Britain, spans 4,000 years from ancient Roman and Egyptian sculpture, to masterpieces by Rembrandt, Reynolds and Veronese, to work by outstanding modern artists, including Lucien Freud, Edmund de Waal and David Nash.

Following dinner, everyone had the opportunity to bid on bespoke items and experiences at a live auction, graciously officiate by Hugh Hildesley from Sotheby's.

We are grateful to all for their generous contributions, as well as our sponsors who supported this event: Rizzoli Books, Albion, Charlotte Moss, Fever Tree, Debevoise & Plimpton, Fever Tree, and Lutz & Carr.



From top, counterclockwise: Guests having dinner at the Century Association; L-R: Prof. Sir David Cannadine, Royal Oak Chairwoman Lynne Rickabaugh, The Duke of Devonshire, Royal Oak Executive Director Ian Murray; L-R: Francesca Connolly, Board member Elise Meslow Ryan, Marc Agger; James Goldston and Emily Mortimer ©Annie Watt.



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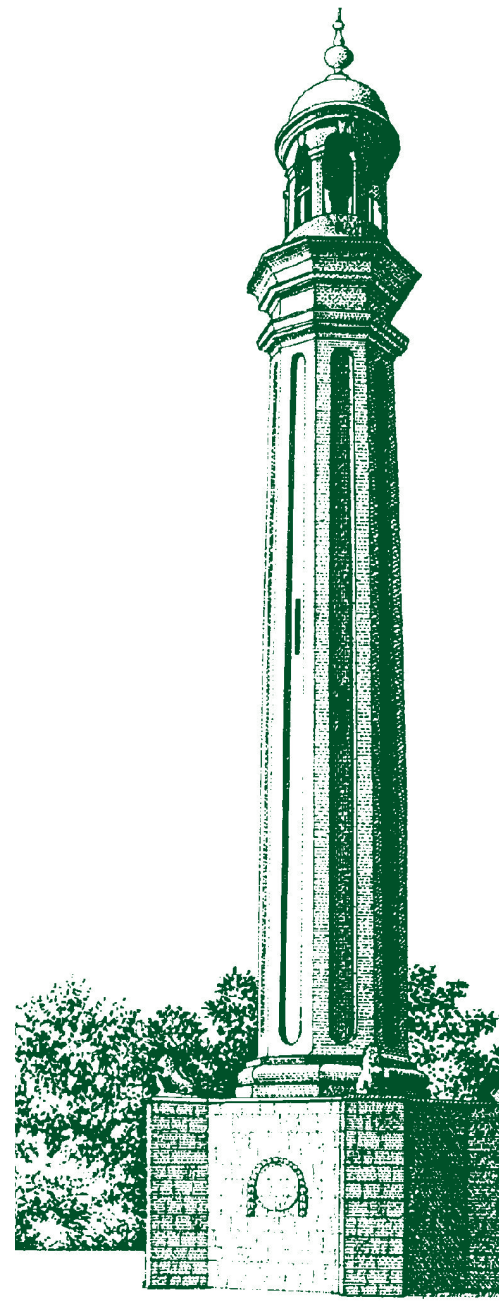
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