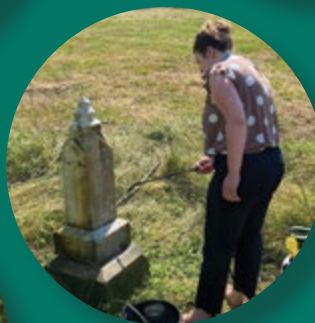


2023 ANNUAL REPORT



Presented at the
**2023
Founders' Day
and
Annual
Members'
Meeting**

July 12, 2023,
5pm-7pm
Hopemont

Meet the Blue Grass Trust

As the 14th oldest preservation nonprofit in the country, the Blue Grass Trust for Historic Preservation is Central Kentucky's ultimate guide and resource for historic preservation. Now into our sixth decade, the Blue Grass Trust continues to provide valuable advocacy, education, and service to the preservation movement in Lexington, Central Kentucky, and throughout the state, ensuring the tangible and intangible benefits of preservation are accessible to every Central Kentuckian.

Our Mission

The Blue Grass Trust for Historic Preservation is Central Kentucky's resource for protecting, revitalizing, and promoting our historic places, enhancing the quality of life for all.

Our Vision

Our vision is to live in a community that honors its diverse cultural legacies through historic preservation.

Our Values

Education: We will share the value of historic preservation with Central Kentucky.

Advocacy: We will lend our voice to historic preservation efforts in our Central Kentucky communities.

Service: We will serve as a resource and guide to help Central Kentuckians in their historic preservation efforts.

Solidarity Statement

As a preservation-focused organization that seeks to protect historic places around us, the Blue Grass Trust for Historic Preservation acknowledges the pivotal role the Black community has played in the creation of our cherished buildings. Just as we seek to protect and support African American history and spaces, the board and staff of the Blue Grass Trust stands with the Black community in the call for justice and racial equality.

Without action, talk is hollow. Here are specific ways we plan to move forward, honoring our mission to be Central Kentucky's resource for protecting, revitalizing, and promoting our historic places, enhancing the quality of life for all:

- We commit to tell the stories of our historic structures with a wider lens and ensure the recorded history of our properties is not whitewashed.
- We will highlight with sensitivity the stories we tell and the viewpoints we use to include Black voices connected to historic properties. As we continue the restoration of Pope Villa, we pledge to research and include stories of the enslaved workers to both focus on their humanity and to celebrate their profound contribution.
- We will expand our efforts to protect properties, such as the Palmer Pharmacy, that are part of the built and cultural legacy of the Black community.
- We vow to listen to Black voices and be receptive to suggestions on how we can do and be better. We are stronger when we work together and consider viewpoints other than our own.

Meet Our Team

Board of Directors

Mike Meuser

President

Dan Vivian

Vice President

Maureen Peters

Secretary

Eugene Young

Treasurer

Matthew Brooks

Janie-Rice Brother

Kathy Chopra

Deidra Dennie

Geneva Donaldson

Dave Elbon

Steve Gardner

Wanda Jaquith

Lucy Jones

Lindy Karns

Teri Kelly

Debbie Long

Carol Martin

Brenna Pye

Rick Queen

Richard Schein

Advisory Board

John Hackworth, Chair

Gay Darsie

Janie Fergus

Barbara Hulette

Nancy Iliiff

Bill Johnston

Zee Faulkner Kurfees

Gloria Martin

Mike Meuser

Tom Moore

Maureen Peters

Craig Potts, SHPO

W. Gay Reading

Sharon Reed

Daniel Rowland

Blue Grass Trust Staff

Jonathan Coleman, Ph.D., *Executive Director*

Zak Leonard, Ph.D., *Historic Preservation Manager*

Jackson Osborne, *Community Outreach Manager*

Missy Pienkowski, *Office and Development Manager*

Stay in touch!

Blue Grass Trust

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859-253-0362

Follow us on social media



@bluegrasstrust



A Letter from our President

Dear Members and Friends of the Blue Grass Trust,

It's a bit difficult to know where to start in order to list all that has occurred at the Trust in the last year, but we certainly hit the ground running. As soon as our new Board and Officers were elected, we began to focus on governance and mission planning for the future of our organization. After a thorough process, assisted by Trek Advancement, a new mission statement was adopted to more closely align our work with the programs that can help make the Trust the number one resource for Preservation in Central Kentucky.

Next came the adoption of a three-year strategic plan to lay out our goals and objectives for the next three years. Our gifted staff then developed an operational plan to make it all happen. This included a comprehensive rewrite of our By-laws which has been completed and adopted by the Board. The changes include a revamping of our committees and a more clearly stated chain of governance within the organization.

The operational plan also tasks us with moving the Latrobe Pope Villa project forward in the next year with the assistance of a nationally recognized fundraising firm.

The staff (with Board input) also led us through a contemporary branding and website redesign. This has resulted in subtle but positive changes to our logo as well as a complete revamping of our website. We thank our Executive Director Dr. Jonathan Coleman for his initiative in securing a grant from VisitLex to underwrite this important work and The Brand Thread for its professional assistance throughout the process.

There have been many changes on our campus this year. The Lexington History Museum has entered into a multi-year lease for the first floor of the Thomas Hunt Morgan house and expects to open exhibits in the near future. A decision to finally end tours at Hopemont has led us to form a committee to “reimagine Hopemont” and its future of service to the Trust. More on that to come.

Finally, we have made two important additions to our professional staff after nation-wide searches. Missy Pienkowski is now on board as our new Office and Development Manager. Zak Leonard has just relocated to Lexington and is our new Historic Preservation Manager.

In closing, this has been an incredible year. Our financial condition is strong, our Board and staff are fully committed to our work and our volunteers continue to be amazing. Thank you for all that you do for the Blue Grass Trust!

Respectfully,

Mike Meuser, President



A Letter from our Executive Director

Dear Members and Friends of the Blue Grass Trust,

As you read our 2023 Annual Report, I know you will be as inspired as I am by the mission-focused work the Blue Grass Trust has accomplished over the past twelve months.

Thanks to our supporters, volunteers, and staff, the Blue Grass Trust has been at work in robust, meaningful ways in every county of Central Kentucky. From our public educational programs, such as the Hopemont Lectures and deTours, to one-on-one consultations and resource facilitation, the Blue Grass Trust is living up to its promise—we are making preservation possible for more Central Kentuckians than ever before. And the value of our preservation work is being noticed and appreciated. Our supporter base has increased and diversified, and this year has been the most successful Annual Fund in our organization's history!

While we celebrate our successes, the Blue Grass Trust is also committed to achieving even more in the coming year. In November, after numerous planning sessions, the Board of Directors adopted a new three-year strategic plan. Think of it as a business plan; we want to invest in historic preservation because we know preservation will pay great dividends for us all. When we invest in historic preservation, we encourage stronger, more equal communities, thriving economies, greater connections to our history, and a more sustainable future. What great returns on our investment!

So how will we be investing in preservation? The Blue Grass Trust wants everyone, from homeowners to developers, from historical societies to local governments, to know we are here to help them navigate their preservation projects and to advocate for the numerous community-wide benefits that preservation brings. We are investing in the stewardship of our properties, especially Latrobe's Pope Villa and Hopemont, whose preservation in the face of demolition spurred our creation 68 years ago. We are investing by expanding the preservation resources we offer to our community. And we are investing in our staff as we prepare to offer more preservation services. In fact, just this month, we welcomed Dr. Zak Leonard, recently of Cornell University, as our new Historic Preservation Manager.

As we look forward to this exciting next chapter, with our mission guiding all we do, please know how grateful I am for your support of the Blue Grass Trust. Together we are making a direct impact on preservation, right here, in our Kentucky communities.

With gratitude,

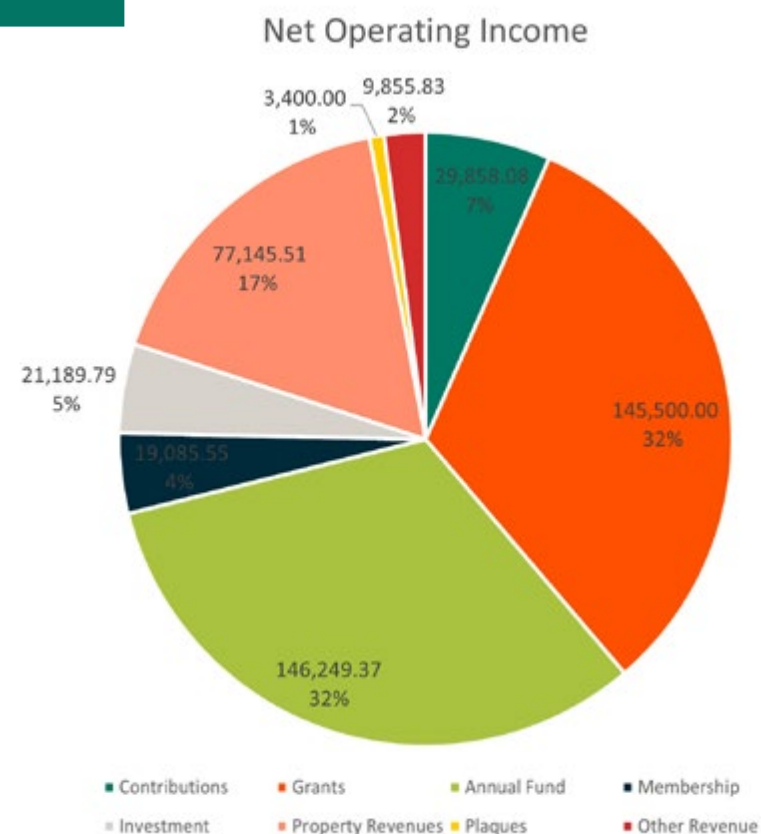
Jonathan Coleman, Ph.D.
Executive Director



Brief Financial Summary

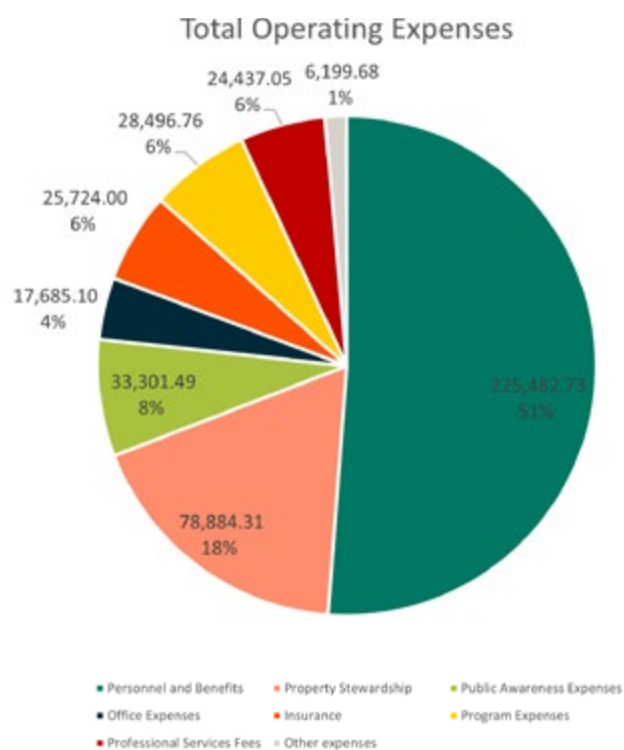
July 1, 2022-May 31, 2023

Revenue:	Operating Expenses:
Contributions	Personnel and Benefits
29,858.08	225,482.73
Grants	Property Stewardship
145,500.00	78,884.31
Annual Fund	Public Awareness
146,249.37	33,301.49
Membership	Office Expenses
19,085.55	17,685.10
Investment	Insurance
21,189.79	25,724.00
Property Revenues	Program Expenses
77,145.51	28,496.76
Plaques	Professional Services Fees
3,400.00	24,437.05
Other Revenue	Other expenses
9,855.83	6,199.68
Total	Total
\$452,284.13	\$ 440,211.12



2022-2023 Financial Highlights

- The 2022-2023 Annual Fund is the most successful in our organization's history.
- Blue Grass Trust received over 100 more donations than in the previous year.
- Total annual revenues have increased approximately 12% in comparison with the previous year.
- More than \$145,000 in grant dollars were received and pledged, shattering our budgeted expectations.
- Earned revenues from our properties have more than doubled.



2023 Nomination Slate

The 2023 Nominating Committee would like to put forward the following slate for consideration and approval by the membership of the Blue Grass Trust. This slate was approved by the Board of Directors on May 15, 2023 at their regular meeting.

The 2023-2024 Officers presented for your consideration and approval are:

President – Mike Meuser
 Vice-President – Daniel Vivian
 Secretary – Maureen Peters
 Treasurer – Eugene Young

The Nominating Committee proposes the following three new board members.



Emily Bergeron is an Associate Professor in the Department of Historic Preservation at the University of Kentucky. She is the Department's Director of Graduate Studies and an affiliate of the University's Center for Equality and Social Justice. Her research focuses on the connections between environmental justice, cultural resource protection, sustainable development, resiliency planning, and affordable housing. Outside of the University, Bergeron is a Vice-Chair of the American Bar Association's Environmental Justice Committee, an editorial board member of Human Rights, and a Co-Editor of *Preservation Education & Research*, the journal of the National Council for Preservation Education. She holds a Ph.D. in City and Regional Planning from Cornell University, a JD, and a Master's in Architectural Studies from the University of Florida.



Beverly Fortune is a former reporter for the *Lexington Herald-Leader* where she was a features writer. Later, she moved to the city desk to cover the mayor, Urban County Council, and the revitalization of downtown. After leaving the *Lexington Herald-Leader*, she was hired by the Downtown Lexington Partnership to organize the successful campaign to establish a Downtown Lexington Management District. Five years later, she headed the reauthorization of the Management District, which was also successful. Beverly suggested LexLights! for the Management District's lighting program in coordination with property owners. This has resulted in LED light displays throughout downtown, including on the pedways. Beverly is a Fayette County Master Gardener and a member of the Ashland grounds crew. She plays piano for the Best Friends Adult Day Center. Beverly has previously served on the Blue Grass Trust board from 2013 to 2019.



Phillip Tibbs is currently Professor and Chair of the Department of Neurosurgery of the University of Kentucky, and is the Director of the UK Spine Center. Phillip's avocation is the study of history, and he is an avid preservationist as is evidenced by his restoration of Vardin's in downtown Paris, KY, as well as his restoration, care, and maintenance of the house and grounds at Forest Retreat, the 1795 home of Kentucky governor and United States Senator Thomas Metcalfe, located in Nicholas County. Phil and his wife Trudy are very active on numerous civic and cultural organizations in Central Kentucky. Dr. Tibbs previously served on the Blue Grass Trust board from 2007 to 2013.

Two board members, Matthew Brooks and Debbie Long, are rotating off after serving full terms. All of us at the Blue Grass Trust are deeply appreciative and indebted to these individuals for their dedicated service on the board.

The ad hoc 2023 Nominating Committee consists of Maureen Peters, Mike Meuser, Eugene Young, Jonathan Coleman, and chair, John Hackworth. Thanks very much to these good people for their suggestions, time, and efforts to fill these critically important positions.

Look at all your support achieved this year!

2022-2023 was an impactful year for the Blue Grass Trust and for our mission to be Central Kentucky's resource for historic preservation. Look at all we accomplished by working together to protect, revitalize, and promote our historic places, enhancing the quality of life for all.

- The Blue Grass Trust team assisted preservation efforts large and small in every county of our Bluegrass service area.
- In August, the Blue Grass Trust began its three-year strategic plan, charting a course towards more robust preservation services for all Central Kentuckians.
- deTours served thousands of people through in-person and virtual visits to a dozen historic sites across the Bluegrass. deTours was generously supported by the Woman's Club of Central Kentucky and recently won a Local History Trust Fund Grant by the Kentucky Historical Society.
- September saw the return of the Hopemont Lecture Series, highlighting the diverse stories and innovative storytellers that make Kentucky history so exciting and relevant.
- Over ten BGT Plaque properties were added to our ever-growing list.
- We welcomed the Lexington History Museum to the ground floor of the Dr. Thomas Hunt Morgan House, increasing our revenue with a mission-focused partnership.
- Our Annual Fund Campaign, launched in November, is now officially the most successful in Blue Grass Trust history.
- The Blue Grass Trust invested in increasing its professional staff as we prepare to increase our preservation services. Welcome Missy Pienkowski and Dr. Zak Leonard!



• In February, Historic Palmer Pharmacy, which the Blue Grass Trust saved from demolition, found a new steward with the United Way of the Bluegrass. They plan to occupy the restored building by December 2023.



• With the spring came our new website and branding, allowing us to communicate our important mission more effectively and with more people than ever before. We are grateful to VisitLex and The Brand Thread for making our efforts possible!

• Annual revenues were up 12% over the previous year as we strive to be excellent stewards of our resources.

• In June we hosted over 120 supporters for the 2023 Preservation Awards, celebrating the positive, far-reaching impact that preservation plays in Central Kentucky. Many thanks to Central Bank, our 2023 Presenting Sponsor.

• More than 700 individuals and organizations joined in our efforts as donors and members—a jump of almost 25%! We are so grateful for their investment.



Community Preservation and Education

PRESERVATION UPDATES

Palmer Pharmacy

The Blue Grass Trust assisted in the transfer of Palmer Pharmacy to the United Way and is assisting its future restoration by underwriting the restoration work by \$100,000, including \$50,000 from the National Trust for Historic Preservation. These funds will be used for the restoration plan of the structure and to help interpret Dr. Palmer's legacy as part of the building's rehabilitation.

Morgan & Morgan

Morgan + Morgan continues to work with LFUCG's Office of Historic Preservation to acquire the Commonwealth Building on High Street. BOAR approved the redesign of the building at its September 2022 meeting; however, it is not known at the time of printing if a proposed agreement to purchase the building has yet been reached.

Other Properties

CP&E continues to monitor the FCPS Versailles Road property acquired by the school system from Dudley Webb and the FCPS Facilities Plan. The Committee also engaged in lengthy discussion about a commercially zoned property being proposed in the H1 district of Cadentown.

DEMOLITIONS

Demolition requests monitored by the Committee over the past year are as follows: 644 East Loudon, 210 East Second Street, 4150 Leestown Road, 340 Lincoln Avenue, 2413 Nicholasville Road, 201 West Second Street, 205 West Second Street, 2340 Buena Vista Road, 1230 East New Circle Road, 1300 Castle Rock Way, 4380 Walnut Station Road, 390 Clearwater Court, 1323 Southern Avenue, and one on Bourbon Street.

PLAQUE APPLICATIONS

The following properties received Blue Grass Trust plaques in the past year: 104 Cove Spring Road in Frankfort KY, 209 Lackawanna Road, 327 East High Street, 608 Mitchell Avenue, 3320 Braemer Drive, 301 Paynes Depot Road, 512 Fairfield Drive, a property in Fayette Park, a church on Russell Cave Road, and 1403 Hill Street.

COMMITTEE HIGHLIGHTS

The CP&E Committee held the 2023 Preservation Awards in May with a capacity audience, awarding thirteen nominees. We are so grateful to Central Bank for being the 2023 Presenting Sponsor of the Preservation Awards! CP&E members submitted articles for the Fall/Winter 2022 and the Spring/Summer 2023 issues of *Preservation Matters* magazine. CP&E members participated in the strategic planning sessions and will be working on several exciting upcoming projects derived from the strategic plan.



deTours

After several years of dealing with Covid uncertainty, 2022/2023 marked a return to normalcy in terms of regular programming. Having benefited from the enhanced reach and potential for storytelling provided by the Covid-era digital deTours, we decided to hybridize our model moving forward. We hosted in-person tours during the warmer months, but transitioned to digital during the winter. This allowed us to reap the benefits of the alternate medium for specially selected sites, as well as to avoid the possibility of potential weather closures. We are endlessly grateful to the Woman's Club of Central Kentucky for providing the funding that made this possible, as well as to our production partners at Media Collaboratory for their discounted non-profit pricing.

Following the popularity of our June 2022 deTour of adaptive reuse in downtown Versailles, we continued a focus on Kentucky's historic neighborhoods. In July, we visited The MET in Lexington's East End. This Community Ventures project features new development alongside adaptive reuse that acknowledges, celebrates, and preserves the culture of this historic African American neighborhood with a focus on art and artists. Our September deTour took us to the Thomson Neighborhood Historic District in Winchester. Located immediately south of the city's commercial core, the district was listed on

the National Register in 1992 for its significance to Winchester's planning between 1888 and 1940. This was a preview of a walking tour designed by the University of Kentucky and featured several stops with interior tours. Finally, our November deTour took us to the hamlet of Cadentown where we visited Lexington's last remaining Rosenwald School and learned about the impact that the school had on the neighborhood—including first-hand accounts from a former student.

In addition to highlighting sites like Warwick and Floraciff that have long-running histories with the Blue Grass Trust, we began building new relationships in 2022/2023. In December, we honored our tradition of visiting a place of worship by partnering with the Three Churches United project to tour some of Midway's oldest African American Churches: Second Christian Church, St. Matthew African Methodist Episcopal Church, and Pilgrim Baptist Church. Three Churches United has created a fund for the protection, restoration, and preservation of these three important structures and we were excited to highlight their work.

Other deTours included Cane Ridge Meeting House, The Jack Jouett House, Mt. Brilliant, Longwood Antiques, and Transylvania University.

We closed 2022/2023 with a tour of Byron Romanowitz's Lakeside home. It was a wonderful opportunity to both explore the late architect's most personal design (still complete with his furniture, art, books, and functioning studio) and celebrate his profound contribution to Lexington's built landscape.

In June 2023, deTours was selected as a recipient of a Local History Trust Fund Grant by the Kentucky Historical Society. We are grateful for their support!



Latrobe's Pope Villa

In November 2022, the Board of Directors of the Blue Grass Trust adopted a strategic goal to “protect Latrobe’s Pope Villa.” The objective of this goal is to “secure the future of the house and site,” and to “determine a path forward for Latrobe’s Pope Villa by the end of the 2023 calendar year.” This goal includes placing formal preservation easements on the property and determining if a few key investors can finance the restoration of the structure.

The Latrobe’s Pope Villa Committee is working closely with its fundraising consultant, BWF, to begin fundraising

to restore the Pope Villa and secure the future of the building. Based on the committee’s recommendation, the Blue Grass Trust entered into a contract with BWF in March. Amy Lampi and Nick Perlick of BWF have been attending the committee’s monthly meetings and providing guidance on donor cultivation and campaign planning. The committee is close to having a final case statement ready. This document discusses the importance of the Pope Villa, explains the need to restore it, and specifies the campaign target. The committee has also developed a list of prospects for a campaign committee and will begin asking people to serve soon. The committee expects to begin making solicitations to key investors no later than August.

On May 1, Blue Grass Trust staff and committee members celebrated Benjamin Henry Latrobe’s birthday at the Pope Villa as a kickoff to Preservation Month. Students from committee member Haviland Argo’s spring architecture studio at the University of Kentucky displayed design proposals and discussed them with attendees. In addition, the committee is working to replace deteriorated elements of the portico at the Pope Villa.

Hopemont Reimagined and Property Stewardship

Exciting things are happening at Hopemont as the Blue Grass Trust begins a serious investment in its flagship property.

In November 2022, the Board of Directors adopted a strategic goal to “reimagine Hopemont.” The “reimagining” will accomplish two things: transform the main floor of Hopemont into a “preservation resource center” where we can more directly provide preservation education, advocacy, and services to the public and transform the second floor into the organization’s administrative offices.

To achieve this goal, the Hopemont Reimagined Committee was formed to “study the current house and grounds and create a multiyear master plan for on-going maintenance and upkeep, as well as the planned adaptive reuse of the space, to be built into the organization’s annual budget.” This special committee of the Board is chaired by Joe Turley, AIA, and includes Jonathan Coleman, Janie Fergus, John Hackworth, Bill Johnston, Carol Martin, and Jackson Osborne.

The Hopemont Reimagined Committee has devised a draft of a multiyear master plan that includes five phases to be completed over the next four years. The committee is completing its work to secure estimated costs for the first two phases and ballpark figures for the remaining three phases. The work of Phase 1, which addresses immediately needed improvements to the structure such as electrical and plumbing upgrades, has already commenced.

In addition to the work at Hopemont, in the past year the Blue Grass Trust has invested over \$40,000 in maintaining the four historic properties under its stewardship. Some highlights of the work include:

- Significant improvements to the Dr. Thomas Hunt Morgan House have continued, such as refurbishing the brick entryway and repairing the limestone barriers in the front lawn. The Blue Grass Trust has also entered into a long-term lease with the Lexington History Museum which now occupies the first floor for their exhibit space and offices.
- Beyond the reimagining, Hopemont has also received snow guards and repaired gutters thanks to the generosity of the Josephine Ardery Foundation, a back chimney is being repaired after damage from the March windstorm, and the ADA access door has been replaced.
- Latrobe’s Pope Villa is preparing to have the parapet of the portico repaired together with some minor repairs to its temporary roof while Endicott Cottage received a new HVAC system alongside plumbing and roof repairs necessitated by the winter and spring weather.



2023 Dot Crutcher Award

Given to an exemplary member of the Blue Grass Trust.

Carol and Rodney Martin

Carol and Rodney Martin’s support of the Blue Grass Trust and historic preservation is exemplary. Blue Grass Trust supporters since 2009, in 2015 they purchased and restored their 200+ year-old home on nearby Mill Street. Currently they are working on another historic restoration on Third Street, following the Secretary of Interior Standards. Both properties have been awarded a place on the National Register of Historic Places. Their son, Taylor, is taking preservation on to the next generation, completing several restoration projects of his own in Lexington.

In addition to their preservation work, Carol serves on the Board of Directors and volunteers on our Facilities Committee. She and Rodney have spent considerable time helping us be good stewards of our historic properties. This past year, they played a big role in renovating the apartment at Hopemont and connecting us with preservation-minded contractors. Rodney has even mowed the lawn.

Carol is a native of Lawrenceburg, Tennessee while Rodney is a Lexington native. She worked in criminal justice for 28 years and recently retired. Rodney owns Martin Motorcoach, a transportation service operating in Kentucky, Indiana, Ohio, Tennessee, North Carolina, South Carolina, and Georgia.

We are grateful to Carol and Rodney for their exemplary service to the Blue Grass Trust and Kentucky’s historic preservation.



2023 Lucy Shropshire Crump Volunteer Award

Given to an individual or group that has provided exemplary service to the Blue Grass Trust throughout the year.

Morgan Clark

Morgan Clark has been a member of the Blue Grass Trust since 2019 and is the digital promotions volunteer for the Blue Grass Trust deTours. Every month she livestreams our in-person deTours and ensures we are up to date with all our deTour social media. Morgan also manages the Blue Grass Trust YouTube channel, uploading the latest deTours, lectures, and livestreams. Our YouTube channel has now reached tens of thousands of viewers! There is no doubt that Morgan’s dedication has directly impacted the success we have seen with deTours.

Morgan has been a resident of Lexington since 2003, but a historic preservation advocate and explorer of backroads for as long as she can remember. She holds a Masters Degree in Digital Marketing, working primarily in the Food & Beverage realm of the Hotel & Hospitality industry. Between Blue Grass Trust deTours, she enjoys spending time with friends and family, brunching, reading, traveling, attending festivals, wandering through nature, and relishing each of those moments alongside her husband, daughter, and two sweet fur babies. Fun fact: She and her husband once lived in the third oldest house in Lexington, built in 1789!

The Blue Grass Trust is grateful to Morgan for her exemplary volunteer service.





www.bluegrasstrust.org