



ANNUAL REPORT

THE HUNTINGTON LIBRARY, ART COLLECTIONS,  
AND BOTANICAL GARDENS

# 2017

# 2017

ANNUAL REPORT

JULY 1, 2016–JUNE 30, 2017

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\*\*Partial year

# PRESIDENT'S MESSAGE



To say that the past year has been both exhilarating and inspiring would be something of an understatement. It was in late March 2017 that I assumed the duties of Interim President of The Huntington, and I have been on the move ever since, with much, personally, to be thankful for; and a great deal more, on behalf of the institution, to be proud of. As you turn the pages of this report, you will see quite clearly what I mean: the level of quality and productivity in our programming, the stewardship and caretaking of our collections, our commitment to the development of new audiences. This is one remarkable place, staffed by the most devoted and talented professionals with whom I have ever worked; and supported by a wider community of donors, volunteers, and members with unrivaled passion and dedication.

In and of itself, the sequence of exhibitions mounted at The Huntington during this last year tells a spectacular story: that we have the range and depth of collections, to say nothing of in-house curatorial talent, to develop our own critically acclaimed shows—on Octavia E. Butler, for example, or on Walt Whitman and Edward Weston. At the same time, it demonstrates that we are fully capable of organizing international loans to showcase significant moments in art history (our “Chinese Woodblock Prints” exhibition being a case in point). We are also nimble enough to act quickly when opportunities arise. Among the latest examples of staff dexterity involved quickly gearing up to exhibit a number of works from the Hammer Museum’s permanent collection in our Huntington Art Gallery while their galleries were under reconstruction. That show, “Van Gogh & Friends,” turned out to be one of our most popular of the year.

And then there was the delightful surprise of the Orbit Pavilion “landing” at The Huntington. This installation, the product of a collaboration with “visual strategists” at JPL, has been so successful that we have extended its run through early September 2019. The silver nautilus structure has been a tremendous success, captivating thousands of visitors with its atmospheric soundscape representing the movement of the International Space

Station and 19 earth-orbiting satellites. It also serves as a reminder that the aerospace industry itself has a significant history, and that The Huntington collects and stewards its archive. In honor of the Orbit Pavilion, in fact, we were fortunate to have aerospace historian Peter Westwick join senior history of science and technology curator Dan Lewis for a panel discussion exploring the history of aerospace in Southern California and the significance of aerospace material in our collections. It is this extraordinary combination of the depth of our collections, the range of our programming, and the expertise of our staff that really sets the institution apart.

Even given the transition in leadership, The Huntington powers on. Our finances are strong and our fundraising operation has not missed a beat, with new gifts and pledges being made with a generosity and regularity that I personally find humbling. Membership continues to grow, and the feedback we hear from our multiple audiences is at once constructive and affirming.

I am particularly excited about embarking on the final phase of construction in the Chinese Garden, which will put the finishing touches on a world-renowned garden experience, and make Liu Fang Yuan the largest Chinese garden in the United States. This volume bears witness to the many and various ways in which our Garden of Flowing Fragrance continues to inspire philanthropy. It has been, and continues to be, a remarkable endeavor, not only in the process of building it but in the joy of sharing it within and beyond the Chinese-American community. It is, in many respects, a reflection of the extraordinary promise of the Los Angeles region: a unique compound of determination, intellect, craftsmanship, and cross-cultural collaboration, to say nothing of chutzpah and imagination.

You have received this Annual Report because you are a treasured supporter of this institution. Without you, we could not possibly achieve even a fraction of what we set out to do, or become even a pale shadow of what we aspire to be. I have become ever more keenly aware of this as the last year has passed. We are honored by, and grateful for, your generosity. Thank you for believing in this amazing place. Together, we move forward.

—Steve Hindle



# AT A GLANCE 2016–17

## FUNDRAISING

**\$36.7** million raised

**42,000** Member families

## COLLECTIONS



**431**  
new art objects



**521,623**  
new library objects



**3,064**  
botanical accessions added  
to the living collections

## FINANCES

**\$669.4**  
million in net assets

**\$520,000**  
in operating surplus

## VISITORS

**749,498**

## RESEARCH

**1,776**  
scholars in residence

**160**  
grants

**\$1.95**  
million funded by grants

## EDUCATION

More than **20,000**  
students visited The Huntington

Over **1,200** volunteers (adults, high school  
students, interns) provided 60,000 hours of service



## ONLINE PRESENCE

**2** million website visits

**10.7** million page views

**175,000** social media followers



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# COLLECTIONS

The Huntington has been steadily growing its holdings in American art since 1979, when it received an initial donation of 50 American paintings from the Virginia Steele Scott Foundation. With this year's opening of the Jonathan and Karin Fielding Wing, the collections took a major, exciting turn: the 5,000 square feet of new gallery space in eight galleries holds more than 200 works from the Fieldings' collection of portraits, rugs, chairs, boxes, quilts, iron work, and other objects dating from the 18th and early 19th century, giving The Huntington rich material with which to recount the early history of American art. The Fieldings donated 165 of these objects to The Huntington's collections.

The structure housing the art is the work of Frederick Fisher and Partners, who created a stately glass lobby and entrance on the south side of the Scott Galleries that mirrors the one they built on the north side in 2005, when they designed the Lois and Robert F. Erburu Gallery. Other improvements to the Scott Galleries included a dramatic redesign, by Overseer and architect Kelly Sutherlin McLeod, of the room devoted to Arts and Crafts master architects Charles and Henry Greene.

Outside, the Orbit Pavilion, a large silver nautilus-shaped structure by NASA's Jet Propulsion Laboratory, kicked off the first year of a new initiative called /five that pairs The Huntington with five different organizations over five years for collaborative projects. Built on the Celebration Lawn directly in front of the 1919 Café, the shimmering metal shell contains a sound installation representing the movement of the International Space Station and 19 earth science satellites (the installation stays on view through early September 2019).

The Huntington's Chinese Garden, Liu Fang Yuan, continues to be a source of inspiration for Chinese culture. This year's Cheng Family Visiting Artist, composer Huang Ruo, held several public events, including a discussion on Chinese opera and a concert featuring excerpts from his opera *Paradise Interrupted*.

In the Library, The Huntington launched a public crowdsourcing project to transcribe and decipher a collection of nearly 16,000 Civil War telegrams between Abraham Lincoln, his Cabinet, and officers of the Union Army. More than 5,000 "citizen archivists" heeded the call.

## Exhibition Highlights

### Chinese Woodblock Prints | Sep. 17, 2016–Jan. 9, 2017 | MaryLou and George Boone Gallery

"Gardens, Art, and Commerce in Chinese Woodblock Prints" explored the art of pictorial prints from the late 16th century to the 19th century—and marked the first time the public could see The Huntington's rare *Ten Bamboo Studio Manual of Calligraphy and Painting* (ca. 1633–1703), acquired in 2014. The exhibition included 48 of the finest examples of woodblock prints from the National Library of China, Beijing; the Nanjing Library; the Shanghai Museum; and 14 institutional and private collections in the United States. On display were visual accounts of sprawling, architecturally elaborate "scholar's gardens," alongside delicate prints with painterly textures and subtle colors depicting plants, birds, and other garden elements. This exhibition received support from the E. Rhodes and Leona B. Carpenter Foundation, the Henry Luce Foundation, the Gladys Krieble Delmas Foundation,





Richard A. Simms, the Constance Hotel, and the Ahmanson Foundation Exhibition and Education Endowment.

**Octavia E. Butler: Telling My Stories | April 8–Aug. 7, 2017 | Library, West Hall**

Author Octavia E. Butler (1947–2006) was the first science fiction writer to receive a prestigious MacArthur “genius” award and the first African American woman to win widespread recognition writing in that genre. Her literary archive resides at The Huntington. This exhibition examined Butler’s life and work, featuring around 100 items, including journal entries, photographs, and a first edition of her best-known work, *Kindred*, about an African American woman who travels back in time to the horrors of plantation life in pre–Civil War Maryland. This exhibition received support from the Robert F. Erburu Exhibition Endowment.

**Real American Places | Oct. 22, 2016–March 20, 2017 | Virginia Steele Scott Galleries of American Art**

The 25 photographs in the exhibition illuminated an understudied chapter in the career of photographer Edward Weston



(1886–1958). In 1941, the Limited Editions Book Club approached Weston to collaborate on a deluxe edition of *Leaves of Grass* by poet Walt Whitman (1819–1892). Weston eagerly accepted the assignment, and, from 1941–42 set out with his wife, Charis Wilson, on a cross-country trip that marked the culmination of an extraordinarily creative and prolific period in his career. This exhibition received support



Opposite page: Detail of Vincent van Gogh (1853–1890), *Hospital at Saint-Rémy*, 1889, oil on canvas, 36 5/16 x 28 in. The Armand Hammer Collection, gift of the Armand Hammer Foundation. Hammer Museum, Los Angeles. Top left: Jonathan and Karin Fielding Wing, Virginia Steele Scott Galleries of American Art. Top right: Patti Perret, detail of photograph of Octavia E. Butler seated by her bookcase, 1986. © Patti Perret. Left: Edward Weston (1886–1958), *Woodlawn Plantation House, Louisiana*, 1941, gelatin silver print. The Huntington Library, Art Collections, and Botanical Gardens. ©1981 Center for Creative Photography, Arizona Board of Regents.

from the Susan and Stephen Chandler Exhibition Endowment and the Steve Martin Fund for American Art.

**Van Gogh & Friends: Masterpieces of Impressionism and Post-Impressionism from the Hammer Museum | July 16, 2016–Jan. 2, 2017 | Huntington Art Gallery**

This year, 15 important works from the Hammer Museum took up temporary





residence at The Huntington, offering visitors the unprecedented opportunity to enjoy masterpieces from both collections in one place. The exhibition contained haunting works by Vincent van Gogh, including *Hospital at Saint-Rémy* (1889) and *The Sower* (ca. 1888), as well as Claude Monet's *View of Bordighera* (1884), Alfred Sisley's *Timber Yard at Saint-Mammès* (1880), and Camille Pissarro's *Boulevard Montmartre, Mardi Gras* (1897). This exhibition received support from the George and Marcia Good Family Foundation and Laura and Carlton Seaver.

Other exhibitions this year included:

- *Lari Pittman: Mood Books* | Sep. 3, 2016–Feb. 20, 2017 | Virginia Steele Scott Galleries of American Art
- *Geographies of Wonder, Part 1: Origin Stories of America's National Parks, 1872–1933* | May 14–Sept. 5, 2016 | Library, West Hall
- *Geographies of Wonder, Part 2: Evolution of the National Park Idea, 1933–2016* | Oct. 22, 2016–Feb. 13, 2017 | Library, West Hall



Top left: Detail of Lari Pittman, *12 Verified Occurrences During a Full Moon*, 2015, acrylic and lacquer spray over gessoed, heavyweight paper board, 27 x 25 x 4.5 in. © Lari Pittman, courtesy of the artist and Regen projects, Los Angeles. Bottom left: Yasuhiro Ishimoto, *William R. Thorsen house, exterior strap detail* (Greene and Greene, architects), 1974, gelatin silver print, 10 3/16 x 7 1/8 in. © Kochi Prefecture, Ishimoto Yasuhiro Photo Center. Above: Robert J. Lang, origami crows from the exhibition *Folded Transformations*. Opposite page: Chinese elm, 60th Annual Bonsai Show.

- *Yasuhiro Ishimoto: Bilingual Photography and the Architecture of Greene & Greene* | June 18–Oct. 3, 2016 | Virginia Steele Scott Galleries of American Art
- *Orbit Pavilion* | Oct. 29, 2016–early Sept. 2019 Celebration Lawn
- *Alex Israel at The Huntington* | Dec. 12, 2015–July 11, 2016 | Huntington Art Gallery
- *Blast! Modernist Painting* | July 16–Nov. 14, 2016 | Huntington Art Gallery
- *Spirit Boys* | April 2–July 25, 2016 | Huntington Art Gallery
- *A History of Whiskers* | Nov. 19, 2016–March 7, 2017 | Huntington Art Gallery
- *A.W.N. Pugin, Prisons, and the Plight of the Poor: British Prints, Drawings, and Illustrated Books from The Huntington's Collections* | March 11–June 26, 2017 | Huntington Art Gallery
- *Folded Transformations* | Oct. 22, 2016–Jan. 29, 2017 | Brody Botanical Center



## Botanical Shows and Events

The year was rich in botanical programming, including a series of talks on East Asian gardens, hands-on workshops about gardening in Southern California, traditional Chinese music every Wednesday in the Chinese Garden, and regular garden talks with associated plant sales.

Botanical shows and events this year included:

- 33rd Succulent Plants Symposium
- Fall Plant Sale
- Penjing and Viewing Stone Show (Southern Breeze Tree and Stone Society)
- International Orchid Show and Sale
- 27th Annual Viewing Stones Show (California Aiseki Kai)
- 45th Annual Camellia Show (Southern California Camellia Society)
- Bonsai-A-Thon (Golden State Bonsai Federation)
- 60th Annual Bonsai Show (California Bonsai Society)
- 14th Annual Clivia Show (North American Clivia Society)
- 43rd Annual Spring Plant Sale
- 52nd Annual Cactus and Succulent Show (Cactus and Succulent Society of America)

## Acquisition Highlights

### ART

In addition to the 165 paintings, quilts, and other objects donated to The Huntington by Jonathan and Karin Fielding, other significant artworks also entered the collections.

The Huntington's Art Collectors' Council voted to acquire a major painting by George Tooker (1920–2011), exemplar of the American "Magic Realist" group, best known for capturing the angst of alienated urban dwellers in the mid-20th century; the piece was acquired in honor of the outgoing director of the Art Collections, Kevin Salatino. The rare and haunting *Bathers (Bath Houses)* (1950) became the first Tooker painting to join a museum collection in the western United States. The Council also acquired for The Huntington *Woman with a Fan* (ca. 1895), a Renaissance-style portrait by Beaux-Arts muralist and illustrator Albert Herter (1871–1950).

The Huntington and the Los Angeles County Museum of Art (LACMA) jointly acquired two prototype chairs (1979–80) made by American artist Donald Judd (1928–1994). The chairs joined a Judd

prototype desk (1978) that LACMA acquired in 2011, thus uniting a suite that will be co-owned by the two institutions. Their design relates to the formal logic of Judd's famous box sculptures, set at perpendicular angles to create the elements of back, seat, and legs.

Other American art acquisitions this year included:

- Charles Reiffel's *Bit of Silvermine—The Old Farm House*, 1916, a gift of Sandra and Bram Dijkstra.
- Agnes Pelton's *Passion Flower*, ca. 1945.
- Lee Mullican's *Peyote Candle*, 1951.
- Sanford Gifford's *An October Afternoon on the Juniata*, 1879, a gift of Robert and Veronique Pittman, and Alexandria and Michael N. Altman, also in honor of Kevin Salatino.

European art acquisitions this year included:

- Joseph Highmore's *Portrait of Daniel Sanxay*, 1748, a gift of the John and Mary Ann Sturgeon Collection.
- Lorenzo Bartolini's *Vase with Serpent-Shaped Handles Sprouting from Medusa Heads*, 1805–20.

## LIBRARY

The Library Collectors' Council this year voted to acquire a unique 10-volume edition of *The Writings of John Muir* (1916–24) that incorporates 260 original photographs—most by Herbert W. Gleason (1855–1937), a nature photographer who inspired the work of Ansel Adams.

The Council also purchased *A Monograph on the Genus Camellia* (1819), an outsize volume containing sumptuous hand-colored aquatint plates after watercolors by Clara Maria Pope (d. 1838).

An additional purchase, *Philosophia Naturalis* (ca. 1680), consists of texts of lectures given by Galileo's friend and colleague Carlo Rinaldini (1615–1698) at the University of Padua, including discussions of Galileo's work and an account of Rinaldini's own important discoveries, such as the convection of heat.

The Council also acquired an unpublished and previously unknown manuscript by U.S. Revolutionary War officer Lewis Nicola (1717–1807), *Divinity of Jesus Christ* (ca. 1794–95), describing his religious doubts. It is an extremely rare example of a theological study penned by an American man of the Enlightenment, providing a new and untapped

source for the study of the rich religious and intellectual life of the Early Republic.

Also purchased was the 16th-century Palmer family genealogical roll of arms signed by Robert Cooke, Clarenceux King of Arms, ca. 1575–84. It is composed of four membranes pasted together to form a document 8.5 feet long—claiming to display the ancestry of the Palmer family of Gloucestershire from the 11th or 12th century into the Elizabethan period.

Additional Library acquisitions this year included:

- Addenda to the Hilary Mantel papers, including material on the recent adaptations of *Wolf Hall* and *Bring Up the Bodies* for stage and television.
- “A Record in Light and Shade”: Photograph Album of the Grand Canyon of Arizona Exhibit, Panama-Pacific International Exposition of 1915.



## COLLECTORS' COUNCILS, 2016–17

## Art

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Geneva and Chuck Thornton  
Sally Wenzlau  
Alyce and Warren Williamson  
Deborah and Robert Wycoff



- Huntington and Holladay family papers. Personal and business papers of Henry Edwards Huntington, Collis Potter Huntington, Caroline Huntington Holladay, Edmund Burke Holladay, and Samuel W. Holladay.
- Ralph S. Peer camellia antiquarian book collection and camellia correspondence archive, 1948–60.
- The papers of author Paul Theroux, including first editions, manuscripts, periodicals, and ephemera. Gift of Frances and Loren Rothschild.

## BOTANICAL

The Huntington's bonsai holdings now number in the hundreds, representing many different species, styles, and sizes. Several important donations joined the collection, including a coast live oak (*Quercus agrifolia*) from Al Nelson and a Chinese elm (*Ulmus parvifolia*) styled in a clump form from Jim Barrett. Other bonsai donations included:

- A 200-year-old *Juniperus chinensis* 'Shimpaku' tree received from the Ritsurin Garden in Takamatsu, Japan, in exchange for a camellia bonsai from The Huntington's collections.

- Two California juniper (*Juniperus californica*) bonsai trees from Gib and Elissa Hoxie.
- A collection of a dozen small trees, pre-trained as bonsai, from Tom Chen.
- A refined bonsai pot with a smooth finish, clean lines, and the remnants of a red stain finish, created at a Japanese internment camp, a donation from Carol Upston.
- Five bonsai, including two California junipers, a Japanese black pine, a Chinese quince, and a Chinese elm, from the son of the late Hal Lee Rosenfeld, an esteemed bonsai collector.

Other donations to the botanical collections included:

- A group of 30 historically important cattleyas, a genus of orchid, from Donald Beebe, in honor of Arthur A. Chadwick, author of *Classic Cattleyas*.
- An assortment of 160 unusual hoyas, from Robert Beckman.
- A collection of 150 books on botanical illustrations, from Tania Norris.

Opposite page, left: George Tooker (1920–2011), *Bathers (Bath Houses)*, 1950, egg tempera on gessoed panel, 20 3/8 x 15 3/8 in. The Huntington Library, Art Collections, and Botanical Gardens. Opposite page, right: Agnes Pelton (1881–1961), *Passion Flower*, ca. 1945, oil on canvas, 24 x 16 in. The Huntington Library, Art Collections, and Botanical Gardens. Purchased with funds from the Virginia Steele Scott American Art Acquisition Fund. Right: Samuel Curtis (1779–1860), *A Monograph on the Genus Camellia*, with illustrations by Clara Maria Pope (d. 1838). London: John and Arthur Arch, 1819. The Huntington Library, Art Collections, and Botanical Gardens. Far right: Herbert W. Gleason (1855–1937), *A Snow-Banner*, ca. 1911, platinum print in William Frederic Badé's *The Writings of John Muir, The Mountains of California*, pt. 1, vol. 4. New York: Houghton Mifflin Co., 1916–24. The Huntington Library, Art Collections, and Botanical Gardens.



## Library

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June and Merle Banta  
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# RESEARCH

Approximately 550 scholars applied for research fellowships at The Huntington for the 2017-18 academic year. As a result of this competition, and through its usual rigorous external peer review process, The Huntington awarded roughly \$1.95 million for long- and short-term fellowships. Of these grantees, 20 enjoyed their residency at The Huntington for a full academic year. These research fellows represent only a small proportion of the scholars who conduct research here: in total, some 1,700 researchers came to conduct work in the institution's library, art, and botanical collections.

## Conferences

It was a rich year for exploring the nature and significance of those American and British authors whose writings are well represented in The Huntington's collections. Over the course of four academic conferences in the spring and early summer of 2017, scholars examined the literature of Octavia E. Butler (1947–2006), Hilary Mantel (b. 1952), Henry David Thoreau (1817–1862), and Evelyn Waugh (1903–1966).

The papers of award-winning science fiction author Octavia E. Butler have become one of the most actively researched archives at The Huntington. A daylong symposium, "Octavia E. Butler Studies: Convergence of an Expanding Field," explored the legacy of a writer whose relevance and influence continue to grow.

Hilary Mantel is a two-time winner of the Man Booker Prize for her novels about Thomas Cromwell—*Wolf Hall* and its sequel *Bring Up the Bodies*—and her papers reside at The Huntington. For her part, Mantel, the inspiration for the "Fictive Histories/Historical Fictions" conference, delivered two inspired plenary talks over the course of three days.

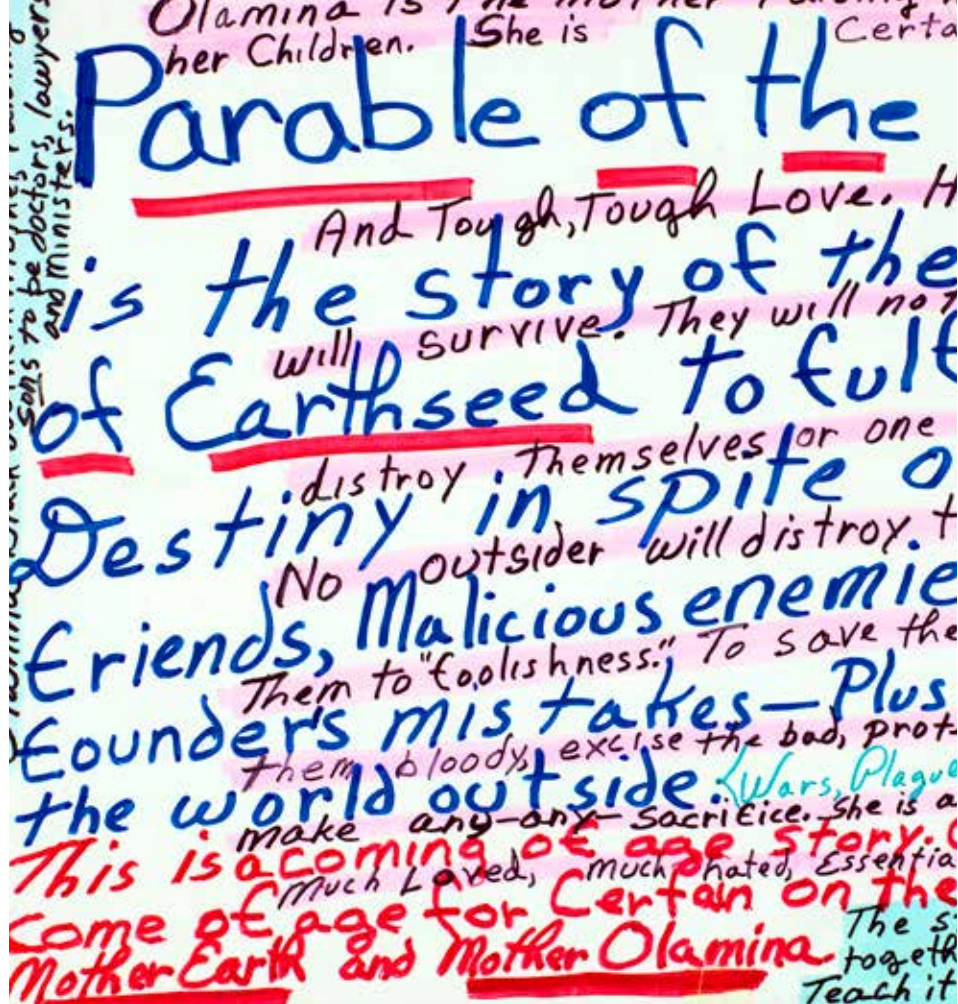
"West of Walden: Thoreau in the 21st Century" commemorated the bicentennial year of Thoreau's birth. The

Huntington owns seven draft manuscripts of *Walden*. During four sessions over two days, scholars examined Thoreau's career as a poet-naturalist in the context of his friendships, correspondence, and political and religious affiliations.

A conference on British author Evelyn Waugh focused on his appreciation for books as objects and as forms of literary art. The catalyst for the conference "Evelyn Waugh: Reader, Writer, Collector" was a 2013 gift by Loren and Frances Rothschild of their Evelyn Waugh collection, including 250 books and 135 letters and manuscripts by the author.

Another conference reached further back in time. In 1746, the renowned preacher and theologian Jonathan Edwards analyzed the wide variety of spiritual and emotional experiences that might be generated by doubt and faith. In *A Treatise Concerning Religious Affections*, Edwards argued that some experiences should be trusted as signs of grace; others, less so. Either way, Edwards remained emphatic about the importance of religious affections. "True religion," he insisted, "in great part, consists in holy affections." "Religious Affections in Colonial North America" brought together experts in history, literature,





Opposite page: Detail of *Pomegranate and Magnolia with Bird*, Qing dynasty, ca. 1700–1750. Artist: Ding Liangxian. Publisher: Jinchang district, Suzhou, Jiangsu province. Woodblock print with embossing, ink and colors on paper (multi-block technique with hand-coloring), 11 7/8 x 14 3/4 in. Museum of Fine Arts, Boston. Photograph © 2016 Museum of Fine Arts, Boston. Left: Octavia E. Butler, detail from notes for *Parable of the Talents*, ca. 1996. The Huntington Library, Art Collections, and Botanical Gardens. © Estate of Octavia E. Butler.

and religious studies to explore how religion shaped the roots, limits, and consequences of affections across the diverse terrain of early America. Opening and closing plenaries spoke to the larger field of American religious history and the study of emotions, with a keynote address by Pulitzer Prize–winning author Marilynne Robinson, professor emerita of the University of Iowa Writers' Workshop.

The complete schedule of 2016–17 conferences is below:

**"Ben Jonson, 1616–2016"** Convened by Martin Butler, professor of English Renaissance drama at University of Leeds, and Jane Rickard, associate professor in 17th-century English literature at University of Leeds. Funded by The Huntington's William French Smith Endowment.

**"Early Modern Literary Geographies"** Convened by Julie Sanders, professor of English at Newcastle University, and Garrett Sullivan, professor of English at Pennsylvania State University. Funded by The Huntington's William French Smith Endowment and the USC-Huntington Early Modern Studies Institute.

#### "Histories of Data and the Database"

Convened by Professors Soraya de Chadarevian and Theodore M. Porter of the UCLA history department. Funded by The Huntington's Dibner History of Science Program.

#### "Religious Affections in Colonial North America"

Convened by Abram Van Engen, professor of English at Washington University in St. Louis, and Caroline Wigginton, professor of English at University of Mississippi. Funded by The Huntington's William French Smith Endowment and the USC-Huntington Early Modern Studies Institute.

#### "West of Walden: Thoreau in the 21st Century"

Convened by Laura Dassow Walls, professor of English literature at University of Notre Dame. Funded by an anonymous donor.

#### "Evelyn Waugh: Reader, Writer, Collector"

Convened by Barbara Cooke, research associate at University of Leicester, and Joseph "Chip" Long, associate professor of international and European studies at Portland State University. Funded by Frances and Loren Rothschild; The Evelyn Waugh

Society; and The Complete Works of Evelyn Waugh Project.

#### "Fictive Histories/Historical Fictions"

Convened by Sophie Coulombeau, lecturer at the School of English, Communication, and Philosophy at Cardiff University. Funded by The Huntington's Dorothy Collins Brown Endowment and The Lluella Morey Murphey Foundation.

#### "Octavia E. Butler Studies: Convergence of an Expanding Field"

Convened by Ayana Jamieson, founder of the Octavia E. Butler Legacy Network and Helen Bing Fellow at The Huntington, and Moya Bailey, with the Octavia E. Butler Legacy Network and assistant professor of Cultures, Societies, and Global Studies and Women's, Gender and Sexuality Studies at Northeastern University. Funded by The Lluella Morey Murphey Foundation.

## Lectures

Public lectures give scholars the opportunity to share their research findings with a wider audience.

- Ray Allen Billington Lecture on the History of the American West | Karl Jacoby, professor of history, Columbia University | "The Strange Career of William Ellis: The Texas Slave Who Became a Mexican Millionaire"
- Ray Allen Billington Lecture on the History of the American West | John Mack Faragher, professor emeritus of history and American studies, Yale University | "'The Theater of Many Deeds of Blood': The Geography of Violence in Frontier Los Angeles"





## IN PRINT

Peter Lake, professor of history at Vanderbilt University, has researched several books on Elizabethan England during his various visits to The Huntington. When he arrived in 2006 to spend a year as the R. Stanton Avery Distinguished Fellow, his plan was to examine William Shakespeare's history plays. Halfway through the year, he realized that he had the makings of not one book but two. In 2016, he published *Bad Queen Bess?: Libels, Secret Histories and the Politics of Publicity in the Reign of Queen Elizabeth I*, which analyzed the political discourse between the Elizabethan regime and its Catholic critics. Eventually, however, Lake returned to his original research project, which was published in 2017. In *How Shakespeare Put Politics on the Stage: Power and Succession in the History Plays* (Yale University Press), Lake examines the first and second tetralogies, as well as *Julius Caesar* and *Hamlet*, to analyze Shakespeare's perspectives on dynastic succession, political factionalism, foreign relations, and confessional conflict—all themes that resonate in modern political contexts. As an account of how Shakespeare understood and mediated Elizabethan politics, one critic described this “astonishing book” as “learned, lively, provocative and often surprising.”

### Other books published this year by long-term fellows included:

David Armitage (Mellon, 2006–07), *Civil Wars: A History in Ideas*, Yale University Press, 2017.

Eric Ash (Dibner, 2013–14), *The Draining of the Fens: Projectors, Popular Politics, and State Building in Early Modern England*, Johns Hopkins University Press, 2017.

Sharla Fett (Mellon, 2008–09), *Recaptured Africans: Surviving Slave Ships, Detention, and Dislocation in the Final Years of the Slave Trade*, University of North Carolina Press, 2017.

Lisa A. Freeman (Mellon, 2005–06), *Antitheatricality and the Body Public*, University of Pennsylvania Press, 2017.

Rob Iliffe (Searle Visiting Professor, 2012–13), *Priest of Nature: The Religious Worlds of Isaac Newton*, Oxford University Press, 2017.

Susan Juster (Ritchie Distinguished Fellow, 2014–15), *Sacred Violence in Early America*, University of Pennsylvania Press, 2016.

Ann M. Little (Dornsife, 2014–15), *The Many Captivities of Esther Wheelwright*, Yale University Press, 2016.

Cynthia Nazarian (Thom, 2012–13), *Love's Wounds: Violence and the Politics of Poetry in Early Modern Europe*, Cornell University Press, 2017.

Katherine Paugh (Thom, 2012–13), *The Politics of Reproduction: Race, Disease, and Fertility in the Age of Abolition*, Oxford University Press, 2017.

Carla Gardina Pestana (Ritchie Distinguished Fellow, 2015–16), *The English Conquest of Jamaica: Oliver Cromwell's Bid for Empire*, Belknap Press, 2017.

Isaac Stephens (NEH, 2013–14), *The Gentlewoman's Remembrance: Patriarchy, Piety, and Singlehood in Early Stuart England*, Manchester University Press, 2016.

Alan Taylor (Ritchie Distinguished Fellow, 2012–13), *American Revolutions: A Continental History, 1750–1804*, W. W. Norton & Co., 2016.

Above: Detail of the cover of *How Shakespeare Put Politics on the Stage: Power and Succession in the History Plays* (Yale University Press, 2017), by Peter Lake.

- George and Arlene Cheng Foundation Lecture in Chinese-American Studies | Mae Ngai, professor of Asian American studies and professor of history, Columbia University | “The Chinese Question: The Gold Rushes and Global Politics”
  - Homer Crotty Lecture in British or European Civilization | Steve Hindle, W. M. Keck Foundation Director of Research, The Huntington | “Mapping the English Village”
  - Homer Crotty Lecture in British or European Civilization | Greg Walker, professor of English literature, University of Edinburgh | “A Satire of the Three Estates: Renaissance Scotland's Best Kept Secret?”
  - Dibner Lecture in the History of Science and Technology | Mary Terrall, professor of history of science, UCLA | “Colonial Dreams: A French Botanist's Encounter with Africa in the 1750s”
  - Paul G. Haaga Jr. Lecture on the History of American Entrepreneurship | Naomi R. Lamoreaux, professor of economics and history, Yale University | “The Value of Patents: A Historian's Perspective”
  - Isherwood-Bachardy Lecture | Edmund White, novelist | “Becoming Gay in the 1960s: Reading *A Single Man*”
  - Allan Nevins Lecture on American History | Christopher Brown, professor of history, Columbia University | “The Atlantic Slave Trade and the American Revolution”
  - Martin Ridge Lecture in Literature | Hilary Mantel, author | “I Met a Man Who Wasn't There”
  - Zamorano Lecture on the History of the Book | Stephen Orgel, professor of humanities, Stanford University | “Excavating the Book”
- The Research Division Public Lecture series also included talks delivered by this year's distinguished fellows:
- John Demos, professor emeritus of history, Yale University | “Potosi, Silver, and the Coming of the Modern World” | Robert C. Ritchie Distinguished Fellow
  - Steven Hahn, professor of history, New York University | “The United States from the Inside Out and Southside North” | Rogers Distinguished Fellow in 19th-Century American History



## LONG-TERM RESEARCH FELLOWS, 2016–17

### R. STANTON AVERY DISTINGUISHED FELLOW

**Jon Mee** (Professor, University of York) | Networks of Improvement?: Book Clubs, Reading Groups, and Philosophical Societies in Britain 1760–1840

### FLETCHER JONES FOUNDATION DISTINGUISHED FELLOW

**Margo Todd** (Professor, University of Pennsylvania) | Urban Community in Early Modern Scotland: Perth from Reformation through Cromwellian Occupation

### LOS ANGELES TIMES DISTINGUISHED FELLOW

**Woody Holton** (Professor, University of South Carolina) | Liberty is Sweet: An Integrated History of the American Revolution

### ROBERT C. RITCHIE DISTINGUISHED FELLOW

**John Demos** (Professor Emeritus, Yale University) | “I am Rich Potosi”: A Crucible of the Early Modern World

### ROGERS DISTINGUISHED FELLOW IN 19TH-CENTURY AMERICAN HISTORY

**Steven Hahn** (Professor, New York University) | Colonies, Nations, Empires: A History of the United States and the People Who Made It

### DIBNER RESEARCH FELLOW IN THE HISTORY OF SCIENCE & TECHNOLOGY

**Tawrin Baker** (Postdoctoral Fellow, University of Pittsburgh) | Chiasmata: Vision in the Intertwined Histories of Anatomy, Natural Philosophy, and Optics in the Early Modern Period

### DANA AND DAVID DORNSIFE FELLOW

**Keith Woodhouse** (Assistant Professor, Northwestern University) | Alternatives to Action: Environmental Impact Statements and American Environmentalism

### FLETCHER JONES FOUNDATION FELLOW

**Nicholas Ridout** (Professor, Queen Mary University of London) | Scenes from Bourgeois Life

### MELLON FELLOW

**Tiffany Werth** (Associate Professor, Simon Fraser University) | The English Lithic Imagination from More to Milton

### MOLINA FELLOW IN THE HISTORY OF MEDICINE & ALLIED SCIENCES

**Heidi Hausse** (Mellon Research Fellow, Columbia Society of Fellows) | Cutting, Coping, Curing: Surgical Dismemberment in the Holy Roman Empire, 1500–1700

### NATIONAL ENDOWMENT FOR THE HUMANITIES FELLOWS

**J. K. Barret** (Associate Professor, University of Texas, Austin) | Pandora's Clock: Contingent Ethics in Renaissance English Literature

**Laura Forsberg** (Assistant Professor, Rockhurst University) | The Miniature and Victorian Literature

**Matthew Hunter** (Assistant Professor, McGill University) | Fluid Cunning: The Temporally Evolving Chemical Object in the British Enlightenment

### BARBARA THOM POSTDOCTORAL FELLOWS

**M. Scott Heerman** (Assistant Professor, University of Miami) | Many Slaverys: An Entangled History of Human Bondage and Emancipation in the Illinois Country, 1730–1865

**María Bárbara Zepeda Cortés** (Assistant Professor, Lehigh University) | The Politics of Reform: José de Gálvez and the Transformation of the Spanish Empire

### FELLOW IN THE HUNTINGTON-UC RIVERSIDE PROGRAM FOR THE ADVANCEMENT OF THE HUMANITIES

**Fuson Wang** (Assistant Professor, City College of New York, CUNY) | Romantic Disease Discourse: A Radical Literary History of Smallpox Inoculation

### CALTECH-HUNTINGTON HUMANITIES COLLABORATIONS FELLOWSHIPS

**Bettina Koch** (Associate Professor, Virginia Tech) | Violence and Disordered Order in Theory and Historical Practice

**Leah Klement** (Post-doctoral Fellow, Caltech) | Violence and Order, Past and Present

### ELEANOR SEARLE VISITING PROFESSOR IN THE HISTORY OF SCIENCE AT CALTECH AND THE HUNTINGTON

**Stefano Gattei** (Independent Scholar) | The Phoenix and the Architect: Speaking Images and the Engraved Frontispiece of Kepler's *Tabulae Rudolphinae*

### OCCIDENTAL/BILLINGTON VISITING PROFESSOR IN U.S. HISTORY

**Bethel Saler** (Associate Professor, Haverford College) | A Republic for a New World: North Africa and the American Imagination, 1783–1825

Above: Steve Hindle, the W. M. Keck Foundation Director of Research (far left) stands with the 2016–17 long-term research fellows. Front row (L-R): Keith Woodhouse, Steve Hahn, Leah Klement, Tiffany Werth, J. K. Barret, María Bárbara Zepeda Cortés, Bethel Saler, Woody Holton. Back row: Margo Todd, Jon Mee, John Demos, Tawrin Baker, M. Scott Heerman, Nicholas Ridout, Bettina Koch, Fuson Wang, and Matthew Hunter.



## FELLOWSHIP APPLICANTS FOR 2017–18

The Huntington received 542 applications in the research fellowship competition for the academic year 2017–18:

### LONG-TERM (NEH, MELLON, DORNSIFE, THOM)

**97** applicants      **7** awards

### SHORT-TERM

**323** applicants      **117** awards

### DIBNER (SHORT-/LONG-TERM)

**44** applicants      **15** short-term awards  
                                  **3** long-term awards

### TRAVEL GRANTS FOR STUDY IN THE UK

**78** applicants      **12** awards

Approximately 35 percent of the 2017–18 grantees were international—from Australia, Canada, Colombia, Croatia, Finland, France, Germany, Ireland, Italy, Mexico, the Netherlands, Poland, Spain, Sweden, Switzerland, and the United Kingdom.

## PEER REVIEW COMMITTEES

### LONG-TERM FELLOWSHIPS

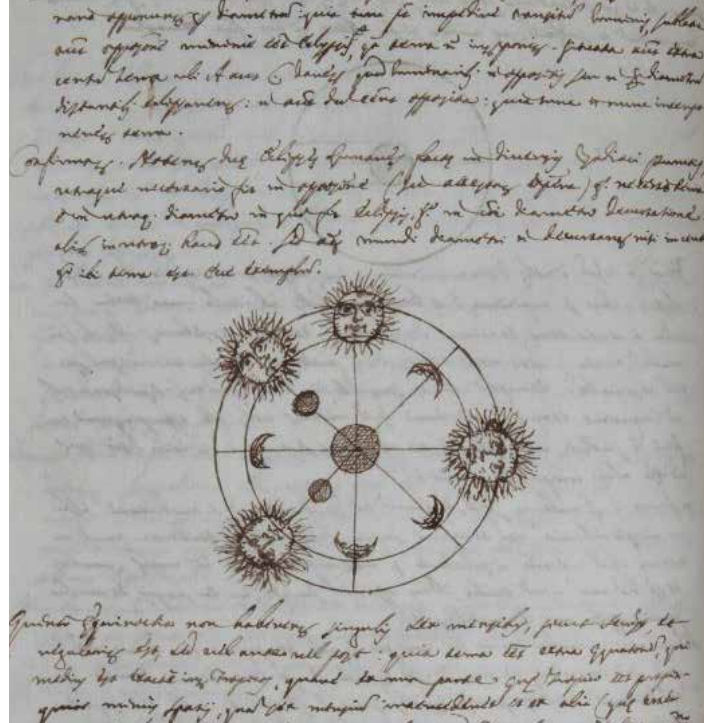
Susan Amussen, UC Merced | Tim Barringer, Yale University | Dympna Callaghan, Syracuse University | Stephen Cushman, University of Virginia | Mark Valeri, Washington University in St. Louis

### SHORT-TERM FELLOWSHIPS

Heidi Brayman, UC Riverside | Brian Cowan, McGill University | Paul Hammer, University of Colorado | Susan Juster, University of Michigan | Jeanette Kohl, UC Riverside | Zachary Leader, University of Roehampton | Alexander Nemerov, Stanford University | Gregory Nobles, Georgia Institute of Technology | Marjorie Rubright, University of Toronto | David Shields, University of South Carolina

### DIBNER FELLOWSHIPS

Peter Dear, Cornell University | Owen Gingerich, Harvard University | Ted Porter, UCLA | Elizabeth Watkins, University of San Francisco | Nico Wey-Gomez, Caltech



- Woody Holton, professor of American history, University of South Carolina | “The New Battlefield History of the American Revolution” | Los Angeles Times Distinguished Fellow in American Studies
- Jon Mee, professor of 18th-century studies, University of York | “Physics and Belles Lettres: The Arts and the Sciences in the Industrial Revolution” | R. Stanton Avery Distinguished Fellow in the Humanities
- Margo Todd, professor of history, University of Pennsylvania | “Sex in the City” | Fletcher Jones Foundation Distinguished Fellow in British History

## Research Institutes

The Huntington co-sponsors two advanced research institutes with the University of Southern California: the USC-Huntington Early Modern Studies Institute (EMSI) and the Huntington-USC Institute on California and the West (ICW). The institutes award research fellowships and convene dozens of seminar meetings, lectures, and workshops throughout the year.

An EMSI conference marking the 50th anniversary of Bernard Bailyn’s *Ideological Origins of the American Revolution* drew a packed crowd to the Whitney Humanities Center at Yale. Speakers included several Pulitzer Prize–winning scholars, such as Harvard history professor emeritus Bailyn (two-time winner), Brown University history professor emeritus Gordon Wood, and Stanford professor of history Jack Rakove.

The EMSI Distinguished Lecturer for 2017, John Demos, the Samuel Knight Professor Emeritus of History at Yale University, delivered a public lecture called “Travels with Satan: A Look Back at Fifty Years as a Witchcraft Historian” and taught a master class, “The Rebirth of Narrative History: Review and Appraisal.” During the same period, Demos was the Robert C. Ritchie Distinguished Fellow at The Huntington.

The EMSI annual workshop with the *William and Mary Quarterly*, “Early American Environmental Histories,” was convened by James Rice,

the Walter S. Dickson Professor of English and American History at Tufts University.

ICW's two-day conference, "Science Fiction Los Angeles: Words and Word Building in the City of Angels," featured authors Steve Erickson, Mark Frauenfelder, M. G. Lord, Margaret Wappler, and others talking about artificial intelligence, the sustained influence of the late Octavia Butler, and the ways in which Ray Bradbury's life in Los Angeles influenced his writing, among other topics. USC professors William Deverell and David L. Ulin convened the conference. USC Dornsife College and the USC Sidney Harman Academy for Polymathic Study provided support.

Other ICW events included Nicole Mitchell's "Xenogenesis Suite: A Musical Tribute to Octavia E. Butler," held in partnership with the Los Angeles arts organization Clockshop. An evening talk, "California's Climate Future: Water and the Sierra Nevada" featured Alex Hall, Director of the Center for Climate Science at UCLA.

ICW's "In Conversation" series continued, including a talk by Benjamin Madley, assistant professor of history at UCLA, who discussed

his recent book, *An American Genocide: The United States and the California Indian Catastrophe, 1846–1873*.

## Publications

The exhibition catalogue *Gardens, Art, and Commerce in Chinese Woodblock Prints*, by T. June Li and Suzanne E. Wright, received three awards: judges' choice in the 2017 PubWest Book Design Awards; best of show in the scholarly book category of the 2017 Publishing Professionals Network Book Show; and second prize for exhibition catalogues in the American Alliance of Museums Publication Design Competition. The publication was made possible by a generous donation from the Sammy Yukuan Lee Family.

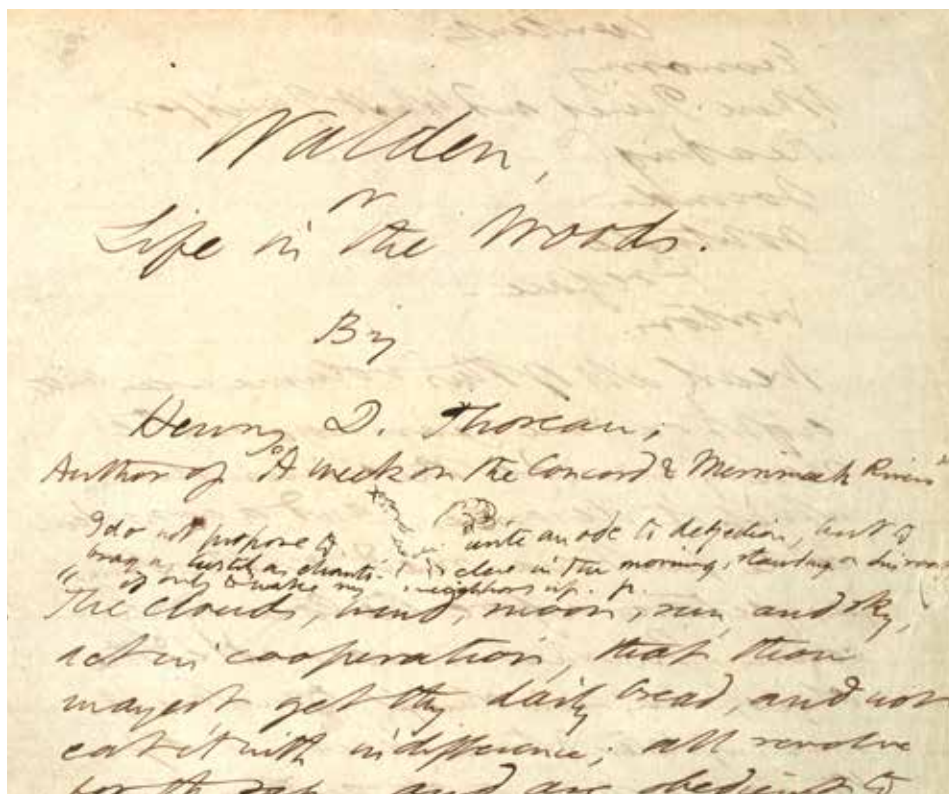
*Facing the Text: Extra-illustration, Print Culture, and Society in Britain 1769–1840* by Lucy Peltz draws on The Huntington's extensive collection of extra-illustrated books. The volume was distributed by Manchester University Press and received funding from the Paul Mellon Centre for Studies in British Art. It was the final publication of the Huntington Library Press imprint, which was discontinued in 2016.

## HUNTINGTON LIBRARY QUARTERLY

Now in its 80th year, the *Huntington Library Quarterly* specializes in the early modern period, publishing research in areas strongly represented in the Library's holdings.

Two special issues came out this year. "Forms of Address," which was dedicated to letter writing and guest edited by Linda C. Mitchell, traced the evolving genre of the letter in locales ranging from the medieval English classroom to the 19th-century American frontier. "Early Modern Manuscript Identities" examined the composition, transmission, and use of manuscripts from the 1560s to the 1660s and was guest edited by Cathy Shrank and Alan Bryson.

The introduction this year of web-based ScholarOne software to track submissions and manage the peer review phase resulted in a significant streamlining of the editorial process.



Opposite page: Detail of *Philosophia Naturalis*, manuscript consisting of lectures delivered by Carlo Rinaldini (1615–1698) at the University of Padua, ca. 1680. The Huntington Library, Art Collections, and Botanical Gardens. Left: Title page, *Walden, or Life in the Woods*, 1848–54, Henry David Thoreau (1817–1862). The Huntington Library, Art Collections, and Botanical Gardens.

## USING THE LIBRARY

Days open to Readers: **302**

Readers in residence: **1,776**

Readers each day on average: **76**

Reader visits: **23,076**

Rare materials used: **31,345**

# EDUCATION

More than 20,000 students and teachers visited The Huntington this year. Many of them participated in workshops, tours, and other education programs related to Huntington exhibitions.



The presence of NASA JPL's Orbit Pavilion—with its sound installation representing the International Space Station and 19 earth science satellites—made for some exciting connections with The Huntington's significant holdings in the history of science and technology.

Schoolchildren and visiting families found inspiration in the story of Pasadena author Octavia E. Butler, who became the first African American woman to win widespread recognition writing science fiction, and whose work and life were the focus of the acclaimed exhibition "Octavia E. Butler: Telling My Stories."

## Partner Schools

Sixth grade students from several partner schools spent a day diving deep into examining the role that creativity plays in scientific innovation. They toured the Orbit Pavilion and then learned about the history of astronomy in the Library's "Beautiful Science" exhibition. Then, guided by Caltech doctoral students in planetary science along with members of the JPL Earth Science outreach team and Carnegie Observatory, the students conducted experiments to help them understand how satellites survey and collect the Earth's vital signs. One of the most popular activities for students was making their own telescopes from cardboard tubes, cardstock, paper,

tape, and a glass lens. They also learned how to identify clouds and then conducted an experiment using alcohol and an air pump to see how clouds form. Participating schools included Arroyo Seco Museum Science Magnet School in Los Angeles, Eliot Middle School in Pasadena, and Rockdale Visual and Performing Arts Magnet in Eagle Rock.

Thirty students from Torres Engineering and Technology Academy participated in the second year of "Careers in Conservation," learning about what goes into managing and treating water to supply the needs of the Los Angeles region. Students explored water paths and habitats, visited the Tillman Water Reclamation Plant, and met with professors and graduate students at UCLA's Department of Geosciences and Environment to better understand career opportunities in the field, among other activities. At the end of the eight-session program, students made presentations outlining their assessments of water challenges facing Los Angeles.

And students from Esteban E. Torres High School's East Los Angeles Performing Arts Magnet performed William Shakespeare's *Hamlet* on the South Terrace of the Huntington Art Gallery. Part of their preparation was spending a day learning about the Bard. They visited his First Folio in the Library's Main Exhibition Hall, looked at images of his plays by engraver and publisher John





Opposite page: Students from Esteban E. Torres High School perform *Hamlet* on the South Terrace of the Huntington Art Gallery, Spring 2017. Photo by Martha Benedict. Left: Sixth graders participate in a “deep learning” exercise inside the Orbit Pavilion. Photo by Lisa Blackburn. Below: A young artist expresses herself during The Huntington Explorers Summer Camp. Photo by Martha Benedict.

Boydell, and viewed Joshua Reynolds’ painting of a famous Shakespearean actress, *Sarah Siddons as the Tragic Muse*.

## Kindergarten through 12th Grade

More and more schools are growing vegetables on school grounds, and The Huntington is joining in to assist, helping to support the Pasadena Unified School District’s school garden program called “Seed to Table.” That new initiative pairs botanical volunteers with students and teachers so they understand how to make best use of learning opportunities in the Huntington’s Ranch garden, herb garden, and orange groves. In the spring, several hundred second graders learned about fruit and vegetable varieties, planting techniques, soil health and more—new knowledge they could then apply back in their school gardens.

The Los Angeles Service Academy celebrated its fifth year serving high school juniors county-wide. Designed as a supplement to the regular school year, the program provides an intensive introduction to the infrastructure







Left: Schoolchildren participating in a docent-led field trip. Photo by Martha Benedict. Opposite page: The words of Octavia Butler helped inspire a creative writing project for students at Rockdale Visual and Performing Arts Magnet in Eagle Rock.

and institutions of greater Los Angeles to those with an interest in public, civic, and civil service. This year, 30 juniors participated in a week-long summer immersion program that included a series of seminars and fieldwork guided by scholars and experts in the field. Some of the activities were a visit to the Metropolitan Water District, working a shift at the Los Angeles Regional Food Bank, and taking a kayak trip along the Los Angeles River. Students then met one Saturday each month during the regular school year. The program is an initiative of the Huntington-USC Institute on California and the West.

### Lifelong Learners

More than 100 teen girls from WriteGirl, a Los Angeles-based creative writing and mentoring organization that works with underserved teens, came to The Huntington for an intensive one-day songwriting workshop. The girls were paired with one of almost 20 professional singers and songwriters. The mentors offered advice such as “Write with

abandon now. Edit later.” and “Always write from the heart.” The day ended with a concert in Rothenberg Hall showcasing the work they had created that day.

Orbit Pavilion inspired several related programs. Aerospace historian Peter Westwick joined Huntington senior history of science and technology curator Daniel Lewis for a panel discussion exploring the history of aerospace in Southern California, including satellite technology, the intersections between aerospace and California culture, and objects relating to aerospace in The Huntington’s collections. A dance performance, “Fluid Infinities,” by Diavolo Dance took place in an abstract dome structure, as the performers explored metaphors of infinite space, continuous movement, and a voyage into the unknown.

To increase public knowledge about local landscapes, The Huntington has continued its collaboration with the California Garden and Landscape History Society to hold public lectures. Landscape historian Steven Keyton

looked at how landscape architects Katherine Bashford and Fred Barlow Jr. created spaces that helped define a regional look for Southern California from the 1930s through World War II. In another talk, landscape historian Nancy Carol Carter examined the horticultural legacy of Kate Sessions (1857–1940), the pioneering nursery owner and garden designer who left an indelible mark with her iconic Arts & Crafts garden style.

Offerings for the seminar series Huntington U continued with Alice Fahs, professor of history from UC Irvine, teaching “The Creative Life in 19th-Century America.” Richard Samuelson, associate professor of history at California State University, San Bernardino, used objects in The Huntington’s collection to bring to life the history of George Washington and the first American presidency.

### Volunteers

The Huntington could not function without so many dedicated volunteers offering their time and expertise in the Library, art galleries, and gardens. More than 1,200 volunteers provided almost 60,000 hours of work this year, translating into a value of nearly \$1.2 million.

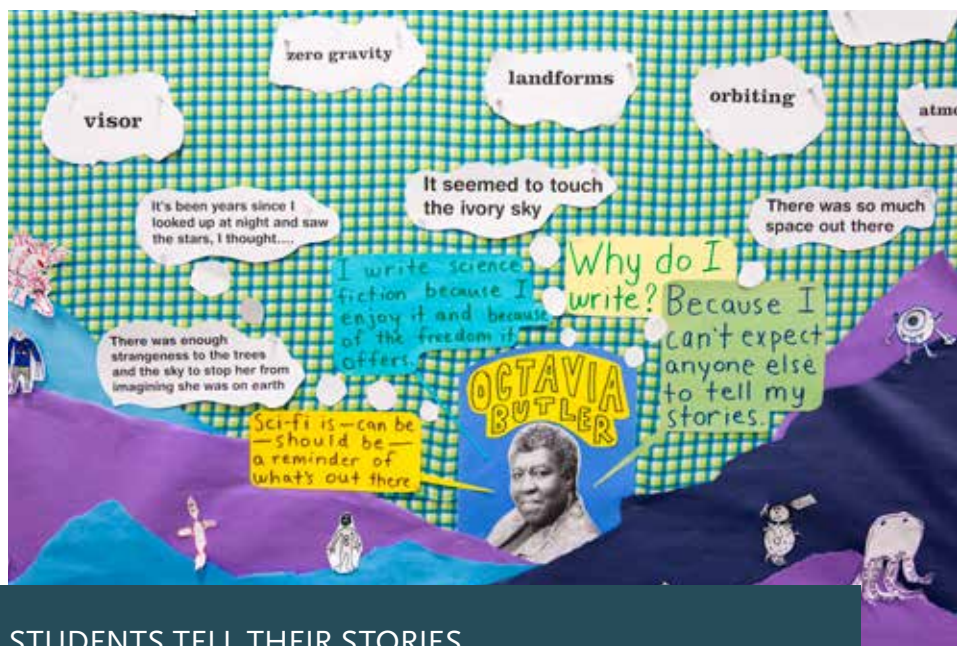
Volunteers work in more than 90 areas at The Huntington, doing everything from pruning roses and editing audio files to freelance writing and touring schoolchildren through the many exhibits and gardens.

High school volunteers worked at the Annual Plant Sale, as well as at their usual assignments with the Discovery Carts, and in welcome centers inside the galleries. Dozens of students from surrounding area schools apply every four months to enter the highly competitive volunteer program.

## Teacher Training

A two-week teachers' institute, "California's Place in American History," was back for a sixth year, showing a group of fourth and fifth grade teachers how to incorporate primary sources into their lessons. Instructors used images of objects from The Huntington's unparalleled collections to put historical themes into context from a regional, local, or even neighborhood perspective. Themes included the mission era in California, native peoples, and the colonial period. Said one teacher, "I will definitely be bringing source materials to the center of my social studies curriculum. Being able to provide these details and context has changed my whole mindset and will have a huge impact on the way I teach."

More than 50 teachers took part in the "Mastering Urban Agriculture program," an initiative now in its eighth year. Topics this year included fruit tree pruning and spring planting.



## STUDENTS TELL THEIR STORIES

Good storytellers have the power to inspire. That's what educators found when they used the works of renowned science fiction writer Octavia E. Butler as a basis for a creative writing program at Rockdale Visual and Performing Arts Magnet, an elementary school in nearby Eagle Rock.

Students in the school's fifth and sixth grades read samples of Butler's published work along with her motivational notes and drafts. Her process guided their own as they emulated how she went about her craft: keeping journals, drawing sketches, and conducting detailed research. In a sense, Butler became their mentor.

The students used passages from Butler's novels *Patternmaster* and *Dawn*, and her short story *Bloodchild*, as a starting point for imagining their own alien world in words and images. Their imaginations caught fire: some students who had previously been reluctant to produce a few lines of writing became inspired to fill pages and pages in their notebooks. Images of fantastic aliens appeared as sketches in their journals and then in bolder, more colorful, painted images, some of which were displayed just outside the Library exhibition "Octavia E. Butler: Telling My Stories."

In surveys, students said they loved using their imaginations and were intrigued by the fact that Butler was a local author who had forged a groundbreaking career writing in the sci-fi genre. "It was one of the best opportunities ever," gushed one child.

# FINANCES

The Huntington experienced a remarkable year, with an increase in the number of visitors and Members, coupled with strong donor contributions. A modest increase in the price of membership went into effect on July 1, 2016, recalibrating the price to more accurately reflect the benefits provided at the various levels. The price change and the addition of nearly 2,000 member households helped drive this year's financial success.

Operating revenues exceeded operating expenses by approximately \$520,000. Revenue from membership was \$1.2 million higher than the previous year, with revenue from admissions some \$887,000 higher as a result of heavy attendance. Several factors contributed to the large number of visitors: the "super bloom," the result of last winter's good rainfall, and popular exhibitions such as the Orbit Pavilion sound installation and "Van Gogh & Friends: Masterpieces of Impressionism and Post-Impressionism from the Hammer Museum." The Huntington Store exceeded prior-year sales by \$208,000, with a contribution of \$778,220 in net margin.

Even so, operating expenses came in over budget as a result of several one-time expenditures, such as the cost of the search for a new Avery Director of the Library, critical but unbudgeted maintenance and repair work, costs associated with putting on the exhibition "Van Gogh & Friends," and the costs associated with overtime and new hires.

The Huntington's total net assets as of June 30, 2017, are at a new high of \$669.4 million, up from last June's year-end balance of \$628.2 million, the result of higher cash, pledges, and endowment balances. The balance sheet is very strong, with the growth of cash, short-term investments, and planned gifts and pledges. The fixed

assets value decreased from \$163 million to \$151 million because of the depreciation of several new structures such as the Erburu Gallery expansion and the Education and Visitors Center; the institution added very little to fixed asset structures or improvements this fiscal year. Finally, the institution dramatically reduced its substantial inventory of books following the decision to discontinue the Huntington Library Press. Many volumes were sold to wholesalers and authors, or placed on consignment with a retail publisher. What remains are books now held as inventory for sale in the Huntington Store.

The endowment's growth this fiscal year was impressive, increasing in performance by 14.7 percent and benefitting, as well, by an influx of several new donor contributions totaling \$6.3 million. The endowment's current value of \$455 million is the highest value ever recorded on The Huntington's balance sheet, with the exception of FY2014, when it stood at \$462 million. With so much upside momentum in the markets, The Huntington's investments outperformed its benchmarks in every asset class for the last six months. The endowment performance reflects a variety of positive market trends, as earnings are strong, inflation is low, interest rates are low, and the global economy is doing well. The endowment is a critical resource, representing 66 percent of our balance sheet and 42 percent of our annual operating budget.







Opposite page: *Leucadendron* 'Pom Pom'. Photo by Lisa Blackburn.  
Left: Karin Fielding touring the new Jonathan and Karin Fielding Wing, Virginia Steele Scott Galleries of American Art, October 2016.

## The Year in Fundraising

Giving at The Huntington totaled a remarkable \$36.7 million in gifts, grants, and realized bequests. Of this amount, \$13.9 million supported the operating budget. This exceptional support from more than 42,000 households strengthens our collections, bolsters education programs, facilitates special exhibitions, optimizes staffing, promotes collections conservation, and much, much more. Each facet of our Advancement program showed results and continued promise.

### HIGHLIGHTS

Several gifts were made in recognition of individuals whose extraordinary dedication to The Huntington has enriched the whole institution:

- In honor of David Zeidberg's leadership as Avery Director of the Library over the past 21 years:
  - Heather and Paul Haaga, Claudia Huntington and Marshall Miller, and

Wendy Munger and Lenny Gumport cumulatively donated \$700,000 to help bolster salaries in the Library division.

- Scott Jordan contributed \$150,000 to endow the newly created annual David Zeidberg Lecture on the History of the Book.
- Trevor and Diane Morris kick-started the efforts to create the David Zeidberg Acquisition Fund with a gift of \$25,000.
- In honor of Stewart Smith's tenure as Trustee Chair, Carolyn Miller made a gift of \$100,000 for general operating support.
- In honor of Philip V. Swan, longtime Overseer and Chair of the Planned Giving Committee, the AS&F Foundation donated \$1 million to establish the Philip V. Swan Art Exhibition Endowment.

Thanks to a \$2.5 million pledge from Stephen E. Rogers, plans are underway to construct a residence for the W. M. Keck Foundation Director of Research. The home will be adjacent to the Allen Avenue entrance and will include space for hosting research-related Huntington functions.

Mario and Therese Molina donated \$2 million to endow the Molina Curator for the History of Medicine and Allied Sciences. The Molinas thoughtfully contributed an additional \$100,000 to support the position until the associated endowment payout begins.

Plans to complete the final phase of construction in the Chinese Garden moved closer to reality, thanks to generous commitments from:

- The Lin Family: Matthew, Joy, George, Amy, Jenny, Tim, Olivia Lee, Vanessa, Brandon, and Ryan (\$3 million)
- Judy Yin Shih and Joel Axelrod (\$2.5 million)
- June and Simon K. C. Li (\$2 million)
- The Ahmanson Foundation (\$1 million)

A significant \$250,000 commitment from Bank of America and a \$100,000 gift from Kim and Ginger Caldwell paved the way for the first major technical examination and conservation treatment of the iconic portrait *The Blue Boy* by English painter Thomas Gainsborough (1727–1788).

Operating support remains The Huntington's highest priority. Several donors deserve special mention for their exceptional financial leadership through annual unrestricted giving. With their individual gifts of \$100,000 or more, each of these donors demonstrated their commitment to a strong institutional core. It is worth noting that several of these individuals also made restricted donations during the same time period:

- Mr. and Mrs. Andrew F. Barth
- Mr. and Mrs. Lloyd E. Cotsen
- Dr. Robert N. Essick and Dr. Jenijoy La Belle
- Heather and Paul Haaga





Blaine and Lynda Fetter, chairs of the 2016 Huntington Ball.

- Gabrielle Jungels-Winkler
- Scott Jordan and Gina Valdez
- Anne F. Rothenberg

The combined total giving for operating support from Membership, the Society of Fellows, the Huntington Ball, Corporate Partners, undesignated bequests, and other unrestricted giving sources totaled \$13.9 million. Unrestricted annual support is essential funding for day-to-day operations and a critical component to meeting programmatic ambitions. Membership stands at nearly 42,000 families and the Society of Fellows totals 590 households.

This year 41 new families joined the Society of Fellows. 65 families donated \$25,000 or more, with four families contributing at the upper levels for the first time this year:

- Christine C. Benter
- Mr. and Mrs. Bruce Coffey
- Bernadette Glenn and Douglas Murray
- Kelly Sutherlin McLeod and Steven McLeod

While unrestricted operating support is key to daily operations, planned giving is key to The Huntington's long-term fiscal health. This was an exceptional year for planned giving in many respects. During this time period, 25 families confirmed their plans to make gifts to The Huntington through their wills, trusts, retirement assets, life insurance policies, or other planned giving vehicles.

The year was punctuated by several annual traditions that celebrate the remarkable Huntington community:

- In March, 110 of The Huntington's most cherished donors participated in the annual Huntington Successors event, which recognizes donors who have made significant gifts over time. The Huntington recognized 22 new Successors who have made cumulative gifts of \$100,000 or more. Fourteen ascending Successors crossed the threshold of cumulative giving exceeding the \$500,000, \$1 million, \$5 million, or \$10 million levels. This impressive group now

includes more than 570 donors who have cumulatively given more than \$900 million to The Huntington.

- The 43rd Annual Spring Plant Sale took place in late April. The Corporate and Foundation Relations team worked with more than 200 volunteers from our Corporate Partners, including The Walt Disney Co., Wells Fargo, Northern Trust, East West Bank, City National Bank, The Capital Group Companies Inc., Bank of America Merrill Lynch, and Panda Restaurant Group Inc. Member comments such as, "We came all the way from Ventura this morning to come to this sale!" and "This plant sale is the highlight of my year, thank you!" made everyone's efforts worthwhile. The sale raised over \$125,000 to support the gardens.
- In June, the institution hosted its fourth annual An Evening Among the Roses, an event celebrating the LGBTQ community. Nearly 500 guests, many of whom were new to The Huntington, enjoyed cocktails, hors d'oeuvres, and dancing in the Rose Garden. This year, the evening also included a performance by the Gay Men's Chorus of Los Angeles and a participatory art project by Kiki Loveday, an artist featured in the five-year cross-institutional initiative titled *"/five."* Wells Fargo was the lead sponsor, with additional support provided by Capital Group, U.S. Trust, and the David Bohnett Foundation.
- Over the summer, the Society of Fellows sponsored the ever-popular Scholarly Sustenance series. Eight evening programs were hosted by Fellows in their homes and at The Huntington. Approximately 320 people attended this year's Scholarly Sustenance series.
- The 2016 Huntington Ball raised more than \$420,000 net. The September gala was chaired by Lynda and Blaine Fetter. Five hundred guests were welcomed for cocktails along the garden at the entrance of the MaryLou and George Boone Gallery followed by dinner and dancing on the Dorothy Collins Brown Garden Lawn, which was transformed

by dynamic lighting, elegant décor, and stunning floral displays by Jacob Maarse. The soiree was catered by the Kitchen for Exploring Foods, with music provided by West Coast Music.

- The Huntington celebrated the mid-autumn moon with its Harvest Moon Celebration in late September. Some 700 people attended. The festivities took place in the Chinese Garden under a full moon and featured nearly 30 Asian or Asian-inspired restaurants that served tasting samples. Guests were entertained with traditional Chinese music, including a performance by the Beijing-based Chinese Music Orchestra. The special exhibition “Gardens, Art, and Commerce in Chinese Woodblock Prints” in the Boone Gallery was also open to guests that evening.
- During the holiday season, some 3,300 Members attended Members’ Champagne & Shopping. Separately, more than 3,000 families participated in the Members’ Santa Days held in the Frances Lasker Brody Botanical Center.
- Individuals who have included The Huntington in their estate plans are invited to join the Arabella and Henry Huntington Heritage Society. Heritage Society members are celebrated each year with a reception in the fall and a spring luncheon. This year, the annual luncheon on May 16 featured remarks by Interim President Steve Hindle and Interim Director of the Art Collections Catherine Hess. The guests then enjoyed a lively presentation on The Huntington’s British drawings collection by Melinda McCurdy, associate curator of British Art.
- The Huntington continues to be a must-visit destination for overseas delegations, particularly those from China. Chief among these was a visit in March from Chinese Minister of Culture Luo Shugang and his delegation. The visit provided a welcome opportunity to discuss opportunities for cross-cultural exchange.
- In recognition of the special relationship that The Huntington has with the City of San Marino, and to thank the residents of San Marino for their support, The Huntington held “San Marino Day at The Huntington” in April. More than 1,200 San Marino residents attended this free event, which featured the San Marino Chamber of Commerce’s “Taste of San Marino,” live music, the Rotary Club’s classic car display, The Huntington Education Division’s student art display, and community organization representatives.

## Unrestricted Giving

The Society of Fellows is a critical source of unrestricted giving, contributing almost \$5 million in operating support. Membership is another important stream of unrestricted support. Fiscal year 2017 marked an institutional high for Membership, with annual revenues of more than \$6 million. Close to a third of all Members are enrolled at the Contributor through Benefactor levels and enjoy the many

special opportunities extended to them, including early access to the gardens, guest privileges, and invitations to exclusive programming.

## FOUNDATION AND CORPORATE SUPPORT

Unrestricted giving from foundations and corporations provides the funds for a range of education initiatives and operations. We gratefully acknowledge:

- Alfred C. Munger Foundation – \$200,000
- Gardner Grout Foundation – \$100,000
- Fitzberg Foundation – \$80,000
- Wells Fargo Foundation – \$50,000 for First Thursdays
- Edison International – \$37,000
- Jerry A. and Kathleen A. Grundhofer Family Foundation – \$30,000
- Bank of America Foundation – \$25,000
- The Capital Group Companies Inc. – \$25,000
- The Rose Hills Foundation – \$25,000 at the direction of Richard Cook
- Wells Fargo – \$25,000
- Anonymous – \$25,000
- Compass Group – \$20,000
- Anonymous – \$10,000
- Bartlett Tree Experts – \$10,000
- MATT Construction Corporation – \$10,000
- Molina Healthcare, Inc. – \$10,000
- The Snider Foundation – \$10,000
- The Walt Disney Co. – \$10,000

## BEQUESTS

- A distribution of \$550,000 was received from the late Thomas W. Wilkins, a retired middle school teacher who made The Huntington the residual beneficiary of his estate.
- \$177,000 was received from the estate of Harold R. Sobel.
- Through two charitable gift annuities, the late Bill Eagleton provided \$73,000 in memory of his late wife Morgina Eagleton, a beloved Huntington colleague.
- \$55,000 was received from the Jean Fiora Preston Educational Charity. The gift extends the generous bequest made through the estate of Jean Fiora Preston, former chief curator of manuscripts.

## Restricted Giving

- Jay and Deborah Last generously donated \$840,000 for Library projects related to the Jay T. Last Collection.
- Toshie and Frank Mosher continued their extraordinary support of the Japanese Garden with gifts totaling \$500,000.
- John and Sharon Light directed a second \$500,000 donation from The Rose Hills Foundation. The grant provided \$100,000 for acquisitions in American art and \$200,000 for the exhibition “Visual Voyages: Images of Latin American Nature from Columbus to Darwin,” in addition to annual support.

- Anne F. Rothenberg contributed \$500,000 for the Presidential Transition Fund.
- In addition to the previously reported gift in honor of David Zeidberg, Scott Jordan gave \$100,000 for “Visual Voyages: Images of Latin American Nature from Columbus to Darwin.”
- William H. Hurt donated a total of \$150,000, \$50,000 to three different programs: the Huntington-USC Institute on California and the West, the Los Angeles Service Academy, and Huntington education programs.
- Continuing their steadfast support of the art collections, Hannah and Russ Kully donated \$100,000 to help acquire *Female Head or Ideal Head* (ca. 1908–11) by Elie Nadelman and \$17,000 towards the acquisition of *La Mer* by French ceramist Pierre-Adrien Dalpayrat.
- Kelvin Lloyd Davis contributed \$100,000 to the Scott Art Acquisition Fund for the joint acquisition with Los Angeles County Museum of Art of a pair of Donald Judd chairs.
- The estate of Victor Gail provided \$100,000 to underwrite the handbook on Victor Gail and Tom Oxford’s American decorative arts collection at The Huntington.
- Mrs. James C. (Joan) Caillouette generously donated \$50,000 for supplies and equipment for art conservation.
- History of science research was bolstered by a \$50,000 gift from David and Kathleen Rips.
- Several generous gifts were made to replace the carpeting in the Huntington Art Gallery: \$50,000 from Geneva and Chuck Thornton through the Thornton Foundation, and \$10,000 apiece from Susan and Stephen Chandler, and Shannon and John Quinn.
- In memory of Victor and Georgianna Willits, Dr. and Mrs. Victor Willits contributed \$34,000 to offset expenses associated with operating the Huntington’s central plant.
- Birch Carlson donated \$49,000—\$24,500 for the Mikki Heydorff Transportation Fund and \$24,500 for the operating endowment.
- In honor of Daniel and Annie Jeng: the families of Kenneth, David, Clifford, Diane Jeng Wong, and Dennis Jeng donated \$38,000 for construction of the final phase of the Chinese Garden.
- The Wong Family: John, Cecilia, Webster, Susan, Meghan, Austin, and Makenna made a pledge of \$30,000 to support the final phase of the Chinese Garden construction.
- Continuing their steadfast support of the Huntington Art Gallery, George Dunning and Robert Marino made a gift of \$30,000 through the California Community Foundation.
- John and Cindy Carson pledged to underwrite a forthcoming conference on the History of the Medical Book.
- In memory of Yutung and Naichien Leu, Ming Taun Leu and family pledged \$25,000 toward final construction of the Chinese Garden.
- Tracy and Ken McCormick gave \$25,000 to begin processing the archives of the Pasadena Playhouse. The archives reside at The Huntington.

- Steve and Carol Rountree made a \$25,000 gift, through a director’s discretionary grant from the Ahmanson Foundation, for the botanical gardens.
- An anonymous gift of \$25,000 was received for final construction of the Chinese Garden.
- Lary and Mary Anne Mielke contributed \$20,000 towards the acquisition of *La Mer*.
- Through The Seaver Endowment, Laura and Carlton Seaver gave \$20,000 to defray expenses from the highly successful temporary exhibition “Van Gogh & Friends.”



- Eunice Erb Goodan made a gift of \$15,000 for “Decoding the Civil War,” a national crowdsourcing project to transcribe and decipher the Thomas Eckert Civil War telegrams.
- Henry and Myriam Hu committed \$15,000 toward final construction of the Chinese Garden.
- Loren and Frances Rothschild donated \$12,500 to help defray costs associated with the conference “Evelyn Waugh: Reader, Writer, Collector.”
- Richard Benefield and John F. Kunowski donated \$11,500 to acquire *Autobiography of a Garden on Twelve Engraved Plates* by American artist Andrew Raftery.
- Andy and Avery Barth contributed \$10,000 to acquire *Struggle* (1931–32) by Ruth Kempster.





Above: 'Raspberry Kiss' rose. Photo by Lisa Blackburn. Opposite page: Members of the Society of Fellows enjoy an exhibition opening for Van Gough & Friends: Masterpieces of Impressionism and Postimpressionism, Summer 2016.

- An anonymous donor contributed \$10,000 towards special projects in the Botanical division.
- Christine and Ken Bender made a gift of \$10,000 for the exhibition "Tiffany Favre Glass: Masterworks from the Collection of Stanley and Dolores Sirott."
- Fred and Diane Blum donated \$10,000 to augment funding for conferences sponsored by the Research division.
- In honor of their parents Ronald and Grace Ross, and Kirk and Min Shih: Steven Ross and Kitty Shih made a gift of \$10,000 for final construction of the Chinese Garden.
- Rita C. Rothman donated \$10,000 for the Shakespeare Summer Education Program, a teacher training program.
- In memory of Beverly Anne Wong, Ed, Ada, Tiffany, and Scott Wong made a gift of \$10,000 for final construction of the Chinese Garden.

- In memory of Ton and Gim Lan Wong, Lenore Wong contributed \$10,000 towards final construction of the Chinese Garden.
- In memory of Mr. and Mrs. Ho Jung Tsai and Shu Ging Tsai, the Sheree Tsai Family made a gift of \$10,000 for final construction of the Chinese Garden.

#### **FOUNDATION, CORPORATE, AND GOVERNMENT SUPPORT (GRANTS OF \$10,000 OR MORE)**

- The National Endowment for the Humanities provided \$129,000 to fund "The Formation and Re-formation of the Book" Summer Seminar.
- The Fitzberg Foundation donated \$100,000 in support of The Huntington's Centennial at the direction of Anne F. Rothenberg.
- The Alfred C. Munger Foundation contributed \$100,000 toward the Scholar Housing Project.
- The Ahmanson Foundation donated \$75,000: \$50,000 for Library acquisitions and \$25,000 to fund public parking improvements.

- Los Angeles County donated \$75,000 to support the ongoing cataloging and digitizing of Los Angeles County records and the transport of Supervisor Don Knabe's archives.
- The Francis Bacon Foundation gave a \$60,000 gift to fund the Bacon Foundation Fellows Program.
- East West Bank contributed \$60,000 toward sponsorship of the Chinese New Year Festival.
- The Robert Day Foundation donated \$50,000 to the President's Discretionary Fund.
- The Willametta K. Day Foundation donated \$50,000 to the President's Discretionary Fund.
- Ayco Charitable Foundation, directed by Louise Henry Bryson and John Bryson, made two gifts totaling \$54,000: \$25,000 for education programs and \$29,000 for a new special access golf cart.
- The Chapman Hanson Foundation made a gift of \$45,000 to support Library Acquisitions.
- The Frederick Hammersley Foundation contributed \$44,000 toward the exhibition "Frederick Hammersley: To Paint without Thinking" and its accompanying catalog.
- The Desert Community Foundation donated \$35,000 toward supplies, equipment, and housing for the avocado preservation project.
- The Dan Murphy Foundation donated \$35,000 to support transportation subsidies for school field trips.
- An anonymous foundation contributed \$25,000 in support of the William French Smith Seminars.
- The Annenberg Foundation donated \$25,000 to the Los Angeles Service Academy educational program.
- The Boone Foundation gave \$25,000 to underwrite the "California's Place in American History" teacher training summer institute.
- The Otis Booth Foundation committed \$25,000 to ongoing development of The Ranch Garden.
- Capital Group Companies Charitable Foundation contributed \$25,000 for Youth and Family Education Programs.
- The Rosalinde and Arthur Gilbert Foundation

provided \$25,000 to support education programs.

- The George and Marcia Good Family Foundation made a gift of \$25,000 in support of the exhibition “Van Gogh & Friends.”
- The Jerry and Terri Kohl Family Foundation donated \$25,000 to acquire *La Mer*.
- The MacTon Foundation made a \$25,000 gift toward the cataloging and digitization of the photographs collection.
- The Golden State Bonsai Federation contributed \$20,000 to the Golden State Bonsai Endowment.
- The Milo W. Bekins Foundation provided \$15,000 in support of the Chinese Garden’s final construction.
- The Edward A. and Ai O. Shay Family Foundation gave a \$15,000 gift to support education programs.
- Edison International made a \$13,000 donation toward the Torres High School Partnership.
- The Evelyn Waugh Society contributed \$12,500 to fund the William French Smith Seminars.

- Associated Foundations Inc., at the direction of Marie Herlihy, donated \$10,000 to support transportation of library materials.
- The John Brockway Huntington Foundation made a \$10,000 contribution toward the Warren Mohr Darwin Endowment.
- The Christopher Isherwood Foundation provided \$10,000 to fund the Isherwood Fellowship Program.
- New Century BMW donated \$10,000 to support the Harvest Moon Celebration.
- Tsan Tsung Memorial Foundation, at the direction of Jack and Grace Hou, donated \$10,000 in support of final Chinese Garden construction.

### Endowment

- Dr. Gloria Ricci Lothrop, a longtime Huntington scholar, made a bequest of \$335,000 to endow a library acquisitions fund and to endow a short-term research fellowship in the field of Western American Women’s History.

- Tania N. Norris created an endowed fund for botanical art and illustration.
- The Robert and Adelaide May Zimmerman Memorial Fund made quarterly gifts totaling \$30,000 in support of general operations.
- The estate of Eva and Loran Whitelock provided \$25,000 for the Loran and Eva Whitelock Endowment for Cycad Cultivation, Conservation, and Research.
- The I. N. and Susanna H. Van Nuys Foundation made ongoing an endowment distribution of \$20,000 for the Schweppe Library Fund for the acquisition of books, manuscripts, and art.
- Marty and Bruce Coffey continued their annual support of the Marty and Bruce Coffey Research Fellowship Endowment via their charitable lead trust with a distribution of \$12,500.
- Marcia Good continued her support of the Marcia A. and George C. Good Endowment with a gift of \$10,000.

### Future Commitments

- Dr. Robert N. Essick, Overseer Emeritus, established a generous \$435,000 charitable gift annuity, which will one day provide vital general unrestricted operating support.
- Nan Rae, brushstroke painting instructor and longtime member of the Huntington community, established a \$100,000 charitable gift annuity, which will ultimately support education.
- An anonymous couple made an \$85,000 addition to their two-life charitable remainder trust with a gift of securities.

New members of the Board of Overseers elected June, 2017. From left to right: Bob Breech, Barbara House, Phil A. Swan, Sandy Bane, and Joseph Chang.



## The Huntington Successors

The Huntington Successors are a symbol of the generosity that is at the heart of this remarkable institution. Donors are recognized as Successors when their cumulative gifts exceed \$100,000. Successors have contributed in excess of \$900 million to The Huntington to advance its mission as an international collections-based research and education institution. Recognition for the following individuals, foundations, corporations, and government agencies reflects cash gifts, grants, bequests, or gifts to the collections received through Dec. 31, 2016, as Successors' gifts are based on the calendar year.

### NEW SUCCESSORS

Anonymous (2)  
AS&F Foundation in honor of Philip V. Swan  
Richards and Ann Barger  
Mr. Titus Brenninkmeijer  
Ms. Catherine C. Cheney and Mr. Barry Jones  
Donald G. Davis  
Mr. Russell Hanlin  
Dr. Stephen A. Kanter  
The Lin Family: Matthew, Joy, George, Amy,  
Jenny, Jerry, Tim, Olivia Lee, Vanessa,  
Brandon, and Ryan  
Gloria Ricci Lothrop Trust  
Ilene and Howard Marshall  
In memory of Ray McSavane  
The Luella Morey Murphey Foundation  
Mr. and Mrs. Ralph Peer II  
Mr. and Mrs. John B. Quinn  
Nan Rae  
Susan W. and Carl W. Robertson  
John and Dorothy Shea  
Mr. and Mrs. William Guy Steele III  
Mr. Paul Theroux  
William and Eileen Zimmerman

### SUCCESSORS ASCENDING TO HIGHER LEVELS

Bank of America  
Christine C. and George H. Benter Jr.  
John and Louise Bryson  
Mr. and Mrs. Theodore G. Congdon  
Blaine and Lynda Fetter  
Jonathan and Karin Fielding  
Mr. and Mrs. Robert C. Goldsmith  
Gardner Groat Foundation  
Mr. and Mrs. Jerry Kohl  
June and Simon K. C. Li  
Sharon and John Light  
Gary, Brenda, and Hayley Ruttenberg  
The Hon. and Mrs. R. Carlton Seaver  
Judy Yin Shih and Joel Axelrod

### CUMULATIVE GIVING TOTALING MORE THAN \$10 MILLION

The Ahmanson Foundation  
MaryLou and George Boone  
Frances Lasker Brody  
Burndy Library  
Estate of Patricia D. Cassat  
Dibner Institute/Dibner Fund  
Hannah and Russel Kully  
Deborah and Jay Last  
Nancy and Charles Munger  
Mr. Peter A. Paanacker  
The Rose Hills Foundation  
Anne and Jim Rothenberg  
The Virginia Steele Scott Foundation  
Estate of Robert Shapazian  
Geneva and Charles Thornton

### CUMULATIVE GIVING TOTALING MORE THAN \$5 MILLION

Anonymous (2)  
Mr. and Mrs. R. Stanton Avery  
Gwen and Guil Babcock  
Estate of Mrs. Harry A. Batten  
Dr. and Mrs. Peter S. Bing  
Lloyd and Margit Cotsen  
Dr. Robert N. Essick and Dr. Jenijoy La Belle  
The Essick Foundation Inc.  
Jonathan and Karin Fielding  
Friends of The Huntington  
The Getty Foundation  
Heather and Paul Haaga  
The Fletcher Jones Foundation  
W. M. Keck Foundation  
June and Simon K. C. Li  
The Andrew W. Mellon Foundation  
Bradford M. and Christine J. Mishler  
Michael Monroe and Deane Weinberg  
National Endowment for the Humanities  
The Kenneth T. and Eileen L. Norris Foundation  
The Ralph M. Parsons Foundation  
Loren and Frances Rothschild  
Judy Yin Shih and Joel Axelrod  
Weingart Foundation

### CUMULATIVE GIVING OF \$1 MILLION TO \$5 MILLION

Estate of Dr. and Mrs. Clarence H. Albaugh  
The Annenberg Foundation  
Anonymous (3)  
ARCO Foundation  
AS&F Foundation in honor of Philip V. Swan  
Associated Foundations Inc.  
The Francis Bacon Foundation  
June and Merle Banta  
Mr. and Mrs. Peter K. Barker  
Olin and Ann Barrett  
Mr. and Mrs. Andrew F. Barth  
The H. N. and Frances C. Berger Foundation  
Julia B. Bodman  
Dorothy Collins Brown  
Dr. and Mrs. George Byrne  
California State Library  
Capital Group Companies Inc.  
Susan and Stephen Chandler  
The Cheng Family Foundation  
Andrew and Peggy Cherng and the Panda  
Restaurant Group  
The Christensen Fund  
Marilyn and Don Conlan  
Paul and Kay Conrad  
Mrs. Homer D. Crotty  
Judith and Bryant Danner  
Estate of Elizabeth and Daniel Donno  
Mr. Donald Duke  
Estate of Dorothy Dumke Elliott  
and Glenn Dumke

Mr. George A. V. Dunning and  
Mr. Robert M. Marino  
Frances Crandall Dyke  
East West Bank  
Edison International  
Mr. and Mrs. Roger Engemann  
Mr. and Mrs. Robert F. Erburu  
Mr. and Mrs. Stanley F. Farrar  
Mr. and Mrs. Gordon Fish  
Estate of Howard W. "Tucker" Fleming Jr.  
and Charles H. Williamson  
Sam Francis Foundation  
Estate of Mary Isabel Fry  
Victor Gail and Tom Oxford  
Mr. and Mrs. Robert C. Goldsmith  
Mildred Browning Green  
The John Randolph Haynes and  
Dora Haynes Foundation  
Estate of George W. Hoffman  
Mary B. Taylor Hunt  
Claudia P. Huntington and Marshall Miller  
Mr. and Mrs. William H. Hurt  
The James Irvine Foundation  
Estate of Patricia Geary Johnson  
Mr. Scott Eric Jordan  
Mr. and Mrs. Earle M. Jorgensen  
Margery and Maurice Katz  
Mr. and Mrs. Peter D. Kaufman  
John Haskell Kemble  
Kennedy Galleries Inc.  
Cynthia Lasker  
Sharon and John Light  
The Lin Family: Matthew, Joy, George, Amy,  
Jenny, Jerry, Tim, Olivia Lee, Vanessa,  
Brandon, and Ryan  
Lawrence D. and Betty Jeanne Longo  
Los Angeles Times  
Mona and Frank Mapel  
Mr. Steve Martin  
Elise Mudd Marvin Trust  
Mr. and Mrs. Kenneth S. McCormick  
Margaret McKenzie  
Mr. and Mrs. Edwards H. Metcalf  
Margot and Mitch Milias  
Mr. and Mrs. Warren D. Mohr  
Dr. and Mrs. J. Mario Molina  
Nancy Cook Moll  
Mong Family Trust  
Mrs. Melvin S. Morse  
Mr. and Mrs. C. C. Moseley  
Frank and Toshie Mosher  
Peter W. and Merle Mullin  
Ms. Wendy Munger and  
Mr. Leonard L. Gumport  
The National Science Foundation  
Mr. Wallace Libby Neff  
Douglas and Elizabeth Nickerson  
Mr. and Mrs. J. Randolph Richards  
Mr. and Mrs. Stephen E. Rogers

Ronus Foundation  
The Seaver Institute  
William and Mary Jeannette Selwyn  
Mr. and Mrs. E. L. Shannon Jr.  
Lisa and Tim Sloan  
Mr. and Mrs. H. Russell Smith  
H. Russell Smith Foundation  
Mr. Stewart Smith and Ms. Robin A. Ferracone  
Mr. and Mrs. Alan G. Stanford  
The Starr Foundation  
Mr. and Mrs. John A. Sturgeon  
Mr. and Mrs. Philip V. Swan  
Mr. and Mrs. L. Sherman Telleen  
Barbara Thom  
The Times Mirror Foundation  
Mr. and Mrs. Lawrence R. Tollenaere  
Mr. and Mrs. David T. Traitel  
Leslie A. and Nancy J. Waite  
The H. R. Wang Family  
Wells Fargo  
Wan-go and Virginia Weng  
Estate of Eva and Loran Whitelock  
Estate of Thomas W. Wilkins  
Mr. and Mrs. Norman B. Williamson  
Mr. and Mrs. Warren Brooks Williamson  
The Beth and Wilbur Woo Family Foundation  
Mr. and Mrs. Robert E. Wycoff  
Gene and Billie Yeager  
Robert Zimmerman and Adelaide May  
Zimmerman Memorial Fund

### CUMULATIVE GIVING OF \$500,000–\$999,999

Anonymous  
Avery-Tsui Foundation  
Don Bachardy  
Bank of America  
Elizabeth Hay Bechtel  
Mr. and Mrs. Robert P. Beckham Jr.  
Christine C. and George H. Benter Jr.  
The Philip and Muriel Berman Foundation  
Maribeth and Hal Borthwick  
Anne Bradulov  
John and Louise Bryson  
Linda Lee Bukowski  
Jonathan D. Bulkeley  
Estate of Octavia E. Butler  
Mrs. William B. Coberly Jr.  
Marty and Bruce Coffey  
Mr. and Mrs. Theodore G. Congdon  
Miss Anne Lloyd Crotty  
Rosario Curletti  
Mr. and Mrs. Trent R. Dames  
Mr. Kelvin L. Davis  
Sandra and Bram Dijkstra  
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*Aeonium arboreum* 'Zwartkop' in flower in the Desert Garden. Photo by Lisa Blackburn.





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*Phaius pulchellus*, from the orchid collection. Photo by Lisa Blackburn.

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Kelly Fernandez watering plant beds in The Ranch garden. Photo by Kate Lain.





In the Ranch Garden, California native plants such as this *Verbena lilacina* 'De La Mina' attract Monarch butterflies and other insect pollinators.

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## REPORT OF INDEPENDENT CERTIFIED PUBLIC ACCOUNTANTS

### To the Board of Trustees of The Henry E. Huntington Library and Art Gallery

We have audited the accompanying financial statements of The Henry E. Huntington Library and Art Gallery ("The Huntington"), which comprise the statement of financial position as of June 30, 2017, and the related statements of activities and changes in net assets, functional expenses and cash flows for the year then ended, and the related notes to the financial statements.

### Management's responsibility for the financial statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Henry E. Huntington Library & Art Gallery as of June 30, 2017, and the results of its operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### Other Matters

#### *Report on 2016 Summarized Comparative Information*

We have previously audited The Huntington's 2016 financial statements (not presented herein), and we expressed an unmodified audit opinion on those audited financial statements in our report dated November 30, 2016. In our opinion, the accompanying summarized comparative information as of and for the year ended June 30, 2016, is consistent, in all material respects, with the audited financial statements from which it has been derived.

*Grant Thornton LLP*

Los Angeles, California

November 15, 2017

## Statement of Financial Position

Year ended June 30, 2017 (With Summarized Comparative Financial Information for the Year Ended June 30, 2016)

	2017	2016
<b>ASSETS</b>		
Cash and cash equivalents	\$ 14,866,610	\$ 15,910,366
Short-term investments	33,731,598	22,529,063
Accounts and other receivables	667,422	348,463
Grants and contributions receivable	15,973,725	14,336,857
Prepaid expenses	806,231	1,034,571
Inventories	855,181	1,065,981
Pooled investments	438,850,112	396,947,606
Beneficial interests in trusts, insurance, and real estate	26,775,136	25,247,678
Real estate	1,832,437	1,804,379
Property and Equipment, net	151,323,845	162,745,247
Total assets	<u>\$ 685,682,297</u>	<u>\$ 641,970,211</u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Liabilities</b>		
Accounts payable and accrued expenses	\$ 5,999,994	\$ 4,627,689
Note payable	-	1,000,000
Obligations under unitrust and annuity agreements	10,107,201	7,750,056
Asset retirement obligation	437,292	416,469
Total liabilities	<u>16,544,487</u>	<u>13,794,214</u>
<b>Net assets</b>		
Unrestricted	341,926,889	336,684,641
Temporarily restricted	188,984,044	156,983,403
Permanently restricted	138,226,877	134,507,953
Total net assets	<u>669,137,810</u>	<u>628,175,997</u>
Total liabilities and net assets	<u>\$ 685,682,297</u>	<u>\$ 641,970,211</u>

## Statement of Activities and Changes in Net Assets

Year ended June 30, 2017 (With Summarized Comparative Financial Information for the Year Ended June 30, 2016)

	Unrestricted	Temporarily Restricted	Permanently Restricted	2017 Total	2016 Total
Operating support and revenue					
Investment return used for operations	\$ 13,396,557	\$ -	\$ -	\$ 13,396,557	\$ 14,450,155
Individual, corporate and foundation contributions	13,062,299	18,246,846	3,718,924	35,028,069	42,222,594
Fees, auxiliary services, sales and other revenue	13,923,567	-	-	13,923,567	12,105,655
Total operating support and revenue	40,382,423	18,246,846	3,718,924	62,348,193	68,778,404
Net assets released from restriction					
Satisfaction of restrictions	(1,021,132)	1,021,132	-	-	-
Total net assets released from restrictions	(1,021,132)	1,021,132	-	-	-
Total operating support and revenue and net assets released from restrictions	39,361,291	19,267,978	3,718,924	62,348,193	68,778,404
Operating Expenses					
Program	49,941,670	-	-	49,941,670	48,205,210
Supporting	12,766,860	-	-	12,766,860	9,205,032
Cost of sales and auxiliary services	4,858,396	-	-	4,858,396	4,931,131
Total operating expenses	67,566,926	-	-	67,566,926	62,341,373
Change in net assets from operations	(28,205,635)	19,267,978	3,718,924	(5,218,733)	6,437,031
Other non-operating revenue, gains and losses					
Investment return	34,414,894	28,566,412	-	62,981,306	(10,942,302)
Change in value of split interest agreements	(967,011)	(2,437,192)	-	(3,404,203)	(3,349,807)
Investment return used for operations	-	(13,396,557)	-	(13,396,557)	(14,450,155)
Total non-operating revenue, gains and losses	33,447,883	12,732,663	-	46,180,546	(28,742,264)
Change in net assets	5,242,248	32,000,641	3,718,924	40,961,813	(22,305,233)
Net assets at beginning of fiscal year	336,684,641	156,983,403	134,507,953	628,175,997	650,481,230
Net assets at end of fiscal year	\$ 341,926,889	\$ 188,984,044	\$ 138,226,877	\$ 669,137,810	\$ 628,175,997



Year ended June 30, 2017 (With Summarized Comparative Financial Information for the Year Ended June 30, 2016)

	Programs				Supporting			Cost of Sales	Allocated Expenses	2017 Total	2016 Total
	Library	Research	Art	Botanical	Public Services	Admin	Fund Raising				
Acquisitions	\$ 1,807,518	\$ 6,952	\$ 2,044,899	\$ 33,232	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,892,601	\$ 3,828,297
Conservation	75,869	-	51,577	3,094	-	-	-	-	-	130,540	105,933
Cost of merchandise and services	-	-	-	-	4,610	-	-	1,796,888	-	1,801,498	1,734,552
Exhibits and programs	210,274	561,734	647,230	743,735	709,946	588,342	1,180,646	162,823	134,350	4,939,080	3,469,008
Grants awarded	-	1,721,778	(373)	54,697	-	-	-	-	-	1,776,102	2,113,501
Insurance	-	-	91,069	-	-	917,846	-	-	1,553	1,010,468	720,564
Maintenance and repair	12,170	7,094	6,105	727,144	87,280	201,175	2,077	12,262	1,113,709	1,988,016	1,783,304
Outside services	173,988	5,554	33,335	21,405	10,875	862,961	13,136	14,307	111,444	1,247,005	939,792
Professional and institutional development	101,886	44,649	83,564	144,736	154,207	257,836	131,487	72,036	44,912	1,035,113	1,106,889
Salaries and benefits	5,323,324	955,970	1,274,133	5,493,764	2,533,094	4,562,721	2,424,769	1,933,684	6,525,591	31,027,050	29,118,123
Supplies, materials, equipment and other	125,401	37,264	55,338	722,167	114,229	366,332	367,333	333,009	619,873	2,740,946	3,093,994
Utilities	-	-	-	218,300	4,811	1,348	7,172	379	1,642,036	1,874,046	1,804,723
Subtotal before allocated expenses	7,830,130	3,340,995	4,286,977	8,162,274	3,619,052	7,577,561	4,126,620	4,325,388	10,193,468	53,462,465	49,818,680
Security, maintenance, and operations	3,962,202	100,915	2,094,757	2,036,655	1,061,140	450,351	165,134	322,114	(10,193,468)	-	-
Subtotal	11,792,332	3,441,910	6,381,734	10,198,929	4,680,192	8,028,112	4,291,754	4,647,502	-	53,462,465	49,818,680
Asset retirement obligation	6,824	-	7,273	2,690	-	4,036	-	-	-	20,823	19,831
Depreciation	3,500,005	58,855	2,804,621	6,480,311	585,994	331,335	111,623	210,894	-	14,083,638	12,502,862
Total expenses FYE 2017	\$1 5,299,161	\$ 3,500,765	\$ 9,193,628	\$1 6,681,930	\$ 5,266,186	\$ 8,363,483	\$ 4,493,377	\$ 4,858,396	\$ -	\$ 67,566,926	\$ 62,341,373
Total expenses FYE 2016	\$1 4,981,176	\$ 3,802,579	\$ 8,662,840	\$1 5,215,729	\$ 5,542,886	\$ 5,154,690	\$ 4,050,402	\$ 4,931,131			
Total Program										\$ 49,941,670	\$ 48,205,210
Total Supporting										\$ 12,766,860	\$ 9,205,032
Total Cost of Sales										\$ 4,858,396	\$ 4,931,131

## Statement of Cash Flows

Year ended June 30, 2017 (With Summarized Comparative Financial Information for the Year Ended June 30, 2016)

	2017	2016
<b>Cash flows from operating activities</b>		
Change in net assets	\$ 40,961,813	\$ (22,305,233)
Adjustments to reconcile changes in net assets to net cash used by operating activities		
Depreciation	14,083,638	12,502,862
Non-cash change to asset retirement obligation	20,823	19,831
Amortization of pledge discounts	840,674	(1,193,105)
Receipt of contributed securities	(2,686,591)	(5,624,828)
Contributions for long-term investment	(5,523,643)	(1,146,033)
Net realized and unrealized (gains) and losses on investments	(60,048,012)	15,205,053
Changes in operating assets and liabilities		
Accounts and other receivables, including accrued investment income	(418,688)	(184,161)
Grants and contributions receivable	(3,256,565)	6,989,423
Prepaid expenses	228,340	(576,782)
Inventories	210,800	(128,738)
Accounts payable and accrued expenses	1,593,729	1,196,542
Other Liabilities	-	(8,573,565)
Net cash used by operating activities	(13,993,682)	(3,818,734)
<b>Cash flows from investing activities</b>		
Proceeds from sales and maturities of investments	136,885,090	101,183,694
Proceeds from sales of contributed securities	2,686,591	5,624,828
Purchases of investments	(131,646,535)	(93,369,916)
Purchases of property and equipment	(2,883,659)	(9,412,952)
Improvements of real estate holdings	(28,058)	(65,353)
Net cash provided by investing activities	5,013,429	3,960,301
<b>Cash flows from financing activities</b>		
Contributions for long-term investment	6,302,663	1,208,533
Change in beneficial interests in trusts and insurance	2,633,834	(1,769,038)
Borrowings on notes payable	-	1,000,000
Repayments on notes payable	(1,000,000)	-
Net cash provided by financing activities	7,936,497	439,495
Net (decrease) increase in cash	(1,043,756)	581,062
Cash and cash equivalents at beginning of fiscal year	15,910,366	15,329,304
Cash and cash equivalents at end of fiscal year	\$ 14,866,610	\$ 15,910,366
<b>Supplement cash flow information:</b>		
Gifts of securities	\$ 2,686,591	\$ 5,624,828
Accounts payable related to the acquisition of fixed assets	\$ 28,986	\$ 250,409

## Notes to Financial Statements

Year ended June 30, 2017 (With Summarized Comparative Financial Information for the Year Ended June 30, 2016)

### 1. ORGANIZATION

The Henry E. Huntington Library and Art Gallery ("The Huntington") is a California nonprofit charitable trust created in 1919 by Henry E. Huntington to promote and advance "learning, the arts and sciences, and to promote the public welfare; to render the books, manuscripts and other contents available to scholars and other persons engaged in research or creative work in history, literature, art, science and kindred subjects; to disseminate and contribute to the advancement of useful information and knowledge; ...and generally to conduct an institution of educational value to the public."

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### Basis of Presentation

The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America ("GAAP"). The Huntington reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets and permanently restricted net assets.

**Unrestricted net assets** – net assets that are not subject to donor-imposed stipulations. The Board of Trustees may elect to designate such net assets for specific purposes or to function as endowment. This designation may be removed at the Board's discretion.

**Temporarily restricted net assets** – net assets that are subject to donor-imposed stipulations that either expire by passage of time or can be fulfilled and removed by actions of The Huntington pursuant to these stipulations. As the restrictions are satisfied, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the accompanying financial statements as net assets released from restrictions. Donor restricted contributions received and expended in the same reporting period may be recorded as unrestricted contribution.

**Permanently restricted net assets** – net assets that are subject to donor-imposed stipulations that must be maintained in perpetuity while permitting The Huntington to use or expend part or all of the income derived from the donated assets.

#### Cash and Cash Equivalents

All highly liquid investments with maturity of three months or less when purchased are considered to be cash equivalents. The Huntington maintains its cash and cash equivalents with major financial institutions. Accounts at these institutions are guaranteed by the Federal Deposit Insurance Corporation ("FDIC") up to \$250,000 for each bank. The Huntington is exposed to credit risk for amounts held in excess of the FDIC limit. The Huntington does not anticipate nonperformance by these institutions.

#### Short-Term Investments

Short-term investments were comprised of money market mutual funds, short term commercial papers and short-term treasury notes. The Huntington's short term investments are measured at fair value using quoted prices that represent Level 1 inputs.

#### Inventories

Inventories are reported at the lower of cost or market on a first-in, first-out ("FIFO") basis and consist of items held by The Huntington Store and Huntington Library Press publications.

#### Investments

Investments with a readily determinable market value are stated at fair value; hedge funds and limited partnerships are also stated at fair value. Other investments including real estate are stated at cost. Gains or losses and investment income on investments are reported in the statement of activities and changes in net assets as increases or decreases in unrestricted net assets, unless their use is temporarily or permanently restricted by explicit donor stipulation. Interest and dividends are accrued as earned or declared.

#### Beneficial Interests in Trusts, Insurance and Real Estate

The Huntington has a beneficial interest in several split-interest agreements. Interests in the gift annuity fund, pooled income fund, and charitable remainder trusts are stated at fair value, with a corresponding liability for the present value of estimated future payments, using discount rates ranging from 3% to 7.5% and life expectancy tables, to the beneficiary(ies) other than The Huntington. A reserve account is maintained for the gift annuity fund in compliance with California Department of Insurance regulations. The Huntington is the beneficiary of life insurance policies with a cash surrender value. The Huntington is also a beneficiary of a one-sixth interest in an apartment building. The gains or losses and investment income on split-interest agreements are reported in the statement of changes in net assets as investment income. When The Huntington is named as trustee under the terms of a split-interest agreement, the agreement is recorded at the fair value of the trust on the date of the trust; a corresponding liability is recorded to recognize the present value of expected future cash flows to be paid to the beneficiary(ies). When The Huntington is not named as trustee under the terms of a split-interest agreement in which it has a beneficial interest, the agreement is recorded when The Huntington is notified of the beneficial interest and when the market value of the agreement can be readily ascertained.

#### Property and Equipment, Net

Property and equipment are recorded at cost or amounts assigned at date of gifts, less accumulated depreciation. The Huntington's policy is to capitalize property acquisitions of non-expendable items with a cost of over \$10,000 and with a useful life of more than one year. Depreciation is computed on a straight-line basis over the estimated useful lives of the buildings and building improvements (10-30 years), equipment and vehicles (3-15 years), and land improvements (15-25 years).

#### Note Payable – Line of Credit

In October 2015, The Huntington entered into an unsecured line of credit with a Bank for \$7 million. The line bears interest at LIBOR plus 0.45%, with an expiration date of September 2017. As of June 30, 2017, The Huntington had a zero balance on the line of credit. Interest paid during the year ended June 30, 2017 and 2016 was \$12,214 and \$7,541, respectively. Covenants on the line of credit require The Huntington to maintain unencumbered liquid assets of 200% of the total commitment with the bank, based on the investment account statements of The Huntington. The Huntington has renewed the line of credit through February 28, 2019; with the same terms mentioned above.

#### Asset Retirement Obligation

The Huntington records conditional asset retirement obligations consistent with Accounting Standards Codification ("ASC") 410, Asset Retirement Obligations. Accrued asset retirement obligations, net of accumulated amortization, at June 30, 2017 and 2016 are \$437,292 and \$416,469, respectively.

#### Contributions and Grants

Unconditional contributions and grants are recorded as revenue when executed, and other contributions are recorded when received. The Huntington records gifts of cash and other assets as temporarily restricted contributions if they are received with stipulations from the donor that limit their use or are to be received in the future. When a donor restriction expires,

that is, when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restriction.

#### **Contributed Services**

A substantial number of volunteers have donated significant amounts of time and services to The Huntington's program operations and to its fundraising campaigns. Contributed services are recognized by The Huntington if the services received (a) create or enhance long-lived assets or (b) require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation. The services donated by volunteers are not reflected in the accompanying financial statements as an expense or as income from donations; such services do not meet the above criteria for recording under GAAP.

#### **Fees, Auxiliary Services, Sales and Other Revenues**

Fees, auxiliary services, sales and other revenues include admissions, bookstore sales, publications sales, fees for reproducing Huntington images, commission fees from the food services provider, fees for filming on The Huntington property, and revenues from other supporting services.

#### **Use of Estimates**

The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses. While management believes that these estimates are adequate as of June 30, 2017, it is possible that actual results could differ from those estimates.

#### **Impairment of Long-lived Assets**

Management reviews each asset or asset group for impairment whenever events or circumstances indicate that the carrying value of an asset or asset group may not be recoverable. The review of recoverability is based on management's estimate of the undiscounted future cash flows that are expected to result from the asset's use and eventual disposition. If an impairment event exists due to the projected inability to recover the carrying value of an asset or asset group, an impairment loss is recognized to the extent that the carrying value exceeds estimated fair value. No impairment provision was recorded by The Huntington during fiscal year 2017.

#### **Taxes**

The Huntington operates as a not-for-profit organization and has been recognized by the Internal Revenue Service as an organization exempt from income taxation pursuant to Internal Revenue Code Section 501(c)(3) on its income other than unrelated business income and has also been recognized by the Franchise Tax Board as exempt from state franchise or income tax pursuant to California Revenue and Taxation Code Section 23701(d) on its income other than unrelated business income.

As required by GAAP, The Huntington has identified and evaluated its significant tax positions for which the statute of limitations remain open and has determined that there is no material unrecognized benefit or liability to be recorded. There have been no material changes in unrecognized benefits as of June 30, 2016 or June 30, 2017, nor are any material changes anticipated in the twelve months following June 30, 2017. There have been no material related tax penalties or interest, which would be classified as a tax expense in the statement of activities.

#### **Functional Expense Reporting**

The costs of providing program and supporting services have been summarized by function, based on estimates developed by management.

#### **Prior Year's Summarized Financial Information**

The financial statements include certain prior-year summarized information in total, but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP in the United States of America. Accordingly, such information should be read in conjunction with The Huntington's financial statements for the year ended June 30, 2016, from which the summarized information was derived.

Reclassification of prior year presentation - For the prior year ended June 30, 2016, the contributions for long-term investments and grants and contributions receivable have been revised in the statement of cash flows to be consistent with the current year presentation. This reclassification had no effect on the statement of financial position or statement of activities and changes in net assets.

#### **Recent Accounting Pronouncements**

In May 2015, the Financial Accounting Standards Board ("FASB") issued Accounting Standard Update ("ASU") 2015-07, Disclosures for Investments in Certain Entities That Calculate Net Asset Value per Share (or its Equivalent). The guidance specifically classified how investments valued using the net asset value ("NAV") practical expedient within the fair value hierarchy should be classified. The ASU was issued in order to address diversity in practice. The amended standard's key provision exempts investments measured using the ("NAV") practical expedient from categorization within the fair value hierarchy and related disclosures. The ASU is effective for fiscal years beginning after December 31, 2016. Management is evaluating the impact on The Huntington.

In August 2015, the FASB issued ASU 2015-14, Revenue from Contracts with Customers (Topic 606); Deferral of the Effective Date. The guidance defers the implementation date of ASU 2014-09, Revenue from Contracts with Customers (Topic 606) to reporting periods beginning after December 15, 2019 for nonpublic entities. Management is evaluating the impact on The Huntington.

In August 2016, the FASB issued ASU 2016-14, Not-for-Profit Entities (Topic 958). The provisions of this ASU include a change from three classes of net assets to two, net assets with donor restrictions and net assets without donor restrictions. Certain enhanced disclosures are also required. The amendments in this update are effective for fiscal years beginning after December 15, 2017, with early adoption permitted. Management is evaluating the impact on The Huntington.

### **3. POOLED INVESTMENTS**

The investments of The Huntington include permanent endowments, funds established by the Board of Trustees to function as endowment, and other balances. Investment returns related to the assets of permanent endowments is classified depending on donor stipulation.

The Endowment Fund investments are managed on a total return basis to provide both income and capital appreciation. Under The Huntington's endowment spending policy, a spending rate is assessed against endowments that support unrestricted and certain temporarily restricted activities, consistent with an annual budget approved by the Board of Trustees. The spending policy allows the expenditure of a prudent amount of the total investment return over a period of time that preserves the future purchasing power of endowment principal. A spending rate of 4.99% of the preceding twelve-quarter average market value of Endowment Fund investments was appropriated to support current operations for the year ended June 30, 2017; 5.08% of the preceding twelve-quarter average market value of Endowment Fund investments was appropriated for the year ended June 30, 2016.

The following schedule summarizes the investment return in the pooled investments and investments from beneficial interest in trusts, insurance, and real estate:



**Pooled investment returns**

Dividends and interest  
 Net realized and unrealized gains (losses)  
 External fees  
 Investment return

	June 30,		2017 Total	2016 Total
	Unrestricted	Temporarily Restricted		
	\$ 3,612,133	\$ 3,014,723	\$ 6,626,856	\$ 7,042,829
	32,942,750	27,105,262	60,048,012	(15,205,053)
	(2,139,989)	(1,553,573)	(3,693,562)	(2,780,078)
	<u>\$ 34,414,894</u>	<u>\$ 28,566,412</u>	<u>\$ 62,981,306</u>	<u>\$ (10,942,302)</u>

The Endowment Fund includes cash and cash equivalents of \$14,733,070 and \$8,746,843 at June 30, 2017 and 2016, respectively, and short-term investments of \$1,506,714 and \$4,364,413 at June 30, 2017 and 2016, respectively.

Pooled investments other than cash and short-term investments are comprised of the following:

	June 30,	
	2017	2016
Treasuries	\$ 17,113,626	\$ 18,816,858
US equities	109,691,689	92,421,953
International equities	67,334,526	58,075,596
Emerging markets investments	44,631,486	35,854,855
Marketable alternative investments	59,967,203	62,376,760
Non-marketable alternative investments	67,716,453	58,567,954
Bonds	7,909,298	4,592,559
Real asset funds	64,332,185	66,229,389
Accrued interest and dividends	153,646	11,682
	<u>\$ 438,850,112</u>	<u>\$ 396,947,606</u>

**4. FAIR VALUE OF INVESTMENTS**

The Huntington accounts for its investments at fair value. ASC 820, Fair Value Measurements, defines fair value, established a framework used to measure fair value, and expands disclosures about fair value measurements. The standard prioritized, within the measurement of fair value, the use of market-based information over entity-specific information and established a three-level hierarchy for fair value measurement based on the transparency of information, such as the pricing source used in the valuation of an asset or liability as of the measurement date.

Investments measured and reported at fair value are classified and disclosed in one of the following categories:

Level 1 – Quoted prices in active markets for identical investments as of the reporting date, without adjustment.

Level 2 – Pricing inputs, including broker quotes, are generally those other than exchange-quoted prices in active markets, which are either directly or indirectly observable as of the reporting date, and fair value is determined through the use of models or other valuation methodologies.

Level 3 – Pricing inputs are unobservable for the investment, and includes situations where there is little, if any, market activity for the investment. Investments that are included in this category generally include privately held investments and securities held in partnership format.

The determination of where an asset or liability falls in the hierarchy requires significant judgment. The Huntington evaluates its hierarchy disclosures each reporting period and, based on various factors, it is possible that an asset or liability may be classified differently from period to period. However, The Huntington expects that changes in classifications between different levels will be rare.

The Huntington's valuation methodologies used for alternative investments measured at fair value is based on net asset value ("NAV") of shares held by The Huntington at fiscal year-end. There have been no changes in the methodologies used at June 30, 2017. The preceding method described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although The Huntington believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The following table summarizes the valuation of The Huntington's investments by the ASC 820 fair value hierarchy levels as of June 30:

	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Other Unobservable Inputs (Level 3)	2017 Total	2016 Total
Short Term Investments	\$ 33,731,598	\$ -	\$ -	\$ 33,731,598	\$ 22,529,063
US Treasuries	\$ 17,113,626	\$ -	\$ -	\$ 17,113,626	\$ 18,816,858
US equities	83,461,672	26,230,017	-	109,691,689	92,421,953
International equities	-	67,334,526	-	67,334,526	58,075,596
Emerging markets investments	26,225,169	-	18,406,317	44,631,486	35,854,855
Marketable alternative investments	-	-	59,967,203	59,967,203	62,376,760
Non-marketable alternative investments	-	-	67,716,453	67,716,453	58,567,954
Bonds	-	7,909,298	-	7,909,298	4,592,559
Real asset funds	28,267,327	6,298,744	29,766,114	64,332,185	66,229,389
	<u>\$ 155,067,794</u>	<u>\$ 107,772,585</u>	<u>\$ 175,856,087</u>	<u>\$ 438,696,466</u>	<u>\$ 396,935,924</u>
Total beneficial interests in trusts, insurance, and real estate	\$ 18,364,516	\$ -	\$ 8,410,620	\$ 26,775,136	\$ 25,247,678

Total investments as of June 30, 2017 and 2016 amounted to \$438,850,112 and \$396,947,606, respectively, which include the investments in the table above and accrued interest and dividends amounting to \$153,646 and \$11,682, respectively.

The following table includes a roll-forward of the amounts for the year ended June 30, 2017 for the investments classified within Level 3. The classification of an investment within Level 3 is based upon the significance of the unobservable inputs to the overall fair value measurement.

Fair value measurements using significant unobservable inputs (Level 3):

	Emerging Markets	Marketable Alternative Investments	Non- Marketable Alternative Investments	Real Asset	Beneficial Interests in Trusts, Insurance, and Real Estate
Beginning Balance June 30, 2016	\$ 15,100,905	\$ 62,376,760	\$ 58,567,954	\$ 27,436,009	\$ 8,267,596
Total gains or losses					
Net realized (losses) and gains	(243,325)	8,696,417	3,685,946	3,067,688	-
Net realized and unrealized appreciation (depreciation)	3,427,599	(805,311)	5,076,555	935,032	143,024
Purchases	(122,188)	14,240,152	8,849,712	4,248,622	-
Sales	243,326	(24,540,815)	(8,463,714)	(5,921,237)	-
Ending Balance June 30, 2017	\$ 18,406,317	\$ 59,967,203	\$ 67,716,453	\$ 29,766,114	\$ 8,410,620

The Huntington uses the NAV to determine the fair value of all the underlying investments which (a) do not have a readily determinable fair value and (b) to prepare their financial statements consistent with the measurement principles of an investment company or which have the attributes of an investment company. Per Accounting Standards Update ("ASU") 2009-12, the following table lists investment in other investment companies (in partnership format) by major category:

Category	Strategy	NAV in Funds	# of Funds	Remaining Life	\$ Amount of Unfunded Commitments	Timing to Draw Down Commitments	Redemption Terms	Redemption Restrictions
Marketable alternative investments	Investments with managers who use alternative strategies, including hedging, to provide returns with reduced volatility compared to the equity and bond markets	\$ 59,967,203	18	NA	\$ 4,000,000	NA	8 funds 45–90 day notice, annual only; 7 funds 30–90 day notice, calendar quarter-end; 3 are other time periods	3 funds have side pockets; 1 fund has lock-up 6 months; 1 fund has ongoing soft lock-up, 6 have redemption gates 10%–33%
Non-marketable alternative investments	Illiquid investments in privately held companies which are expected to produce returns in excess of traditional equities	\$ 67,716,453	43	1–13 years	\$ 47,864,048	8 funds, commitment period has expired; remaining funds range from 1–13 years	NA	3–13 year lockup, with 2–4 years extension
Real asset funds	Investments that will provide protection from the longterm effects of inflation	\$ 29,766,114	19	1–10 years	\$ 16,517,056	1 fund, commitment period has expired; remaining funds range from 1–10 years	NA	17 funds have 5–15 year lock-up with 1–2 year extensions

## 5. GRANTS AND CONTRIBUTIONS RECEIVABLE

Unconditional promises to give are included in the financial statements as grants and contributions receivable, and revenue is recorded in the appropriate net asset category. Certain promises to give are recorded after discounting, at a rate between 1% and 9% at June 30, 2017, at the present value of the future cash flows. As of June 30, unconditional promises to give are expected to be realized in the following periods:

	June 30,	
	2017	2016
Amounts due in		
Less than one year	\$ 5,936,523	\$ 7,583,790
One to five years	6,699,000	2,480,690
More than five years	7,401,500	7,495,000
Less: discount	(4,063,298)	(3,222,623)
	<u>\$ 15,973,725</u>	<u>\$ 14,336,857</u>

## 6. ENDOWMENTS

The Huntington's endowment consists of 262 individual donor-restricted endowment funds. The net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

The Board of Trustees of The Huntington has interpreted the Uniform Prudent Management of Institutional Funds Act ("UPMIFA") as requiring the preservation of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, The Huntington classifies as permanently restricted net assets (a) the original value of the gifts donated to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund.

The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by The Huntington in a manner consistent with the standard of prudence prescribed by UPMIFA. In accordance with UPMIFA, the following factors are to be considered in making a determination to appropriate or accumulate endowment funds:

- The duration and preservation of the fund.
- The purposes of the organization and the donor-restricted endowment fund.
- General economic conditions.
- The possible effect of inflation and deflation.
- The expected total return from income and the appreciation of investments.
- Other resources of the organization.
- The investment policies of the organization.

The following table presents The Huntington's endowment composition, and net asset classification as of June 30, 2017:

	Unrestricted	Temporarily Restricted	Permanently Restricted	2017 Total	2016 Total
Donor-restricted endowment funds	\$ -	\$ 149,093,160	\$ 135,639,507	\$ 284,732,667	\$ 257,188,446
Board-designated endowment funds	180,800,528	-	-	180,800,528	163,454,751
Total endowment funds	180,800,528	149,093,160	135,639,507	465,533,195	420,643,197
Total beneficial interests in trusts, insurance, and real estate	1,227,716	9,555,678	2,587,370	13,370,764	14,252,642
Total Endowment Net Assets	\$ 182,028,244	\$ 158,648,838	\$ 138,226,877	\$ 478,903,959	\$ 434,895,839

From time to time, the fair value of the assets associated with individual donor-restricted endowment funds may fall below the value of the initial and subsequent donor gift amounts. Deficits of this nature were reported as an adjustment to unrestricted net assets of \$(133,790) and \$(1,271,846) as of June 30, 2017 and 2016, respectively.

#### 7. PROPERTY AND EQUIPMENT

At June 30, property and equipment consist of the following:

	June 30,	
	2017	2016
Land	\$ 2,082,008	\$ 2,082,008
Land improvements	54,558,082	52,901,279
Buildings and improvements	188,532,526	187,581,747
Equipment and vehicles	22,969,653	20,329,872
Construction in progress	1,480,059	4,065,186
Total Land, buildings and equipment	\$ 269,622,328	\$ 266,960,092
Less accumulated depreciation	(118,298,483)	(104,214,845)
	\$ 151,323,845	\$ 162,745,247

Depreciation expense was \$14,083,638 and \$12,502,862 for the years ended June 30, 2017 and 2016, respectively.

#### 8. LIBRARY, ART AND GARDEN COLLECTIONS

The collections, which were acquired through purchases and contributions since The Huntington's inception, are not recognized as assets on the statement of financial position. The collections are held for public education or research in furtherance of public service rather than financial gain.

Collections items are expensed when purchased. Contributed collections items are not reflected on the financial statements. The estimated fair value of contributed collections items amounted to \$6,400,000 and \$1,260,000 for the years ended June 30, 2017 and 2016, respectively.

The Huntington continually reviews its collections and may deaccession or acquire additional items. Proceeds from deaccessions are classified as unrestricted, except when donor restrictions apply. The collections are subject to a policy that requires proceeds from deaccessioning to be used to acquire other items for collections.

During fiscal year 2017 and 2016 certain items of art were deaccessioned at auction. They had a value of approximately \$13,000 and \$287,000, respectively. The proceeds are restricted for future acquisitions of art.

#### 9. CONTRIBUTED SERVICES

The Huntington received contributed services of \$48,000, and \$23,000 for the years ended June 30, 2017 and 2016, respectively, in the form of shipping, production services, and lighting.

#### 10. RETIREMENT PLANS

The Huntington maintains a qualified defined contribution retirement plan. As of January 1, 2016, all employees scheduled to work 20 hours or more are eligible to participate. The Huntington's contributions to the plan were \$1,755,207 and \$1,666,165 for the years ended June 30, 2017 and 2016, respectively. The Huntington will provide all eligible employees with a base contribution that is immediately vested in the participants' accounts, and a matching contribution that has a one-year vesting period for all new employees after January 1, 2016.

The Huntington maintains a 457(b) deferred compensation plan for management and highly compensated employees. The plan balance was \$314,399 and \$283,785 as of June 30, 2017 and 2016, respectively.

## 11. NET ASSETS

Net assets consist of the following:

	2017 Total	2016 Total
Unrestricted net assets:		
Available for operations	\$ 7,912,128	\$ 7,392,572
Invested in fixed assets	151,986,517	164,387,976
Beneficial interests in trusts and insurance	1,227,716	1,449,342
Funds held for investment	180,800,528	163,454,751
Total unrestricted net assets	<u>\$ 341,926,889</u>	<u>\$ 336,684,641</u>
Temporarily restricted net assets:		
For program activities	\$ 9,743,578	\$ 9,114,545
For acquisitions	1,536,591	1,721,690
For fixed assets	19,055,037	10,663,375
Beneficial interests in trusts and insurance	9,555,678	10,154,854
Funds held for investment	149,093,160	125,328,939
Total temporarily restricted net assets	<u>\$ 188,984,044</u>	<u>\$ 156,983,403</u>
Permanently restricted net assets:		
Beneficial interests in trust and insurance	\$ 2,587,370	\$ 2,648,446
Endowment	135,639,507	131,859,507
Total permanently restricted net assets	<u>\$ 138,226,877</u>	<u>\$ 134,507,953</u>

Net assets were released from donor restriction by incurring expenses satisfying the restricted purpose or by occurrence of other events specified by donors and also includes investment return used for operations, as follows:

	June 30,	
	2017	2016
Expenditures for program activities, including acquisition of collection items	\$ 10,764,348	\$ 28,677,231
Expenditures for fixed assets	1,611,078	8,500,683
	<u>\$ 12,375,426</u>	<u>\$ 37,177,914</u>

## 12. COMMITMENTS AND CONTINGENCIES

In the normal course of operations, The Huntington is named as a defendant in lawsuits and is subject to periodic examinations by regulatory agencies. After consultation with legal counsel, management is of the opinion that liabilities, if any, arising from such litigation and examinations would not have a material effect on The Huntington's financial position.

## 13. SUBSEQUENT EVENTS

The Huntington evaluated its June 30, 2017 financial statements for subsequent events through November 15, 2017, the date the financial statements were available to be issued. The Huntington is not aware of any subsequent events which would require recording or disclosure in the financial statements.



