

# HERITAGE

FOUNDATION OF WILLIAMSON  
COUNTY, TN



**HERITAGE  
FOUNDATION**  
WILLIAMSON COUNTY, TN

**2018-2019 ANNUAL REPORT**

MAY 2018 - APRIL 2019

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# DEAR FRIENDS,



At the two year mark of my tenure with the Heritage Foundation, I'm really proud of the growth and momentum we are experiencing. We have increased our staff size, enhanced our communication and marketing efforts, grown our educational programming, executed signature events, and raised millions of dollars to support our mission of "saving the places that matter" in Williamson County. Best of all, we're having fun as we work to make a difference in this community!

Our most recent undertaking, the preservation and restoration of Franklin Grove Estate and Gardens, is our biggest project in history. Once complete, it will have gardens, art collections, event space, a schoolhouse and so much more. I am especially proud that this project supports economic vitality in downtown Franklin, which is a big focus of our DFA division.

Without question, I believe the tremendous success of our organization is directly linked to the people who give of their time, resources and talents to help us achieve our mission. In my role, I am surrounded by outstanding community leaders who serve on the Heritage Foundation board. I also work daily with a very talented group of staff members who are completely invested in making sure the Foundation is successful in carrying out its mission. Additionally, we have countless volunteers, members, sponsors, donors and others who make a difference every single day for the Heritage Foundation.

We are truly in an unprecedented chapter of our collective story. Here's to another amazing year, together.

Sincerely,

*Bari A. Beasley*

# OVERVIEW

## HISTORIC PRESERVATION MATTERS





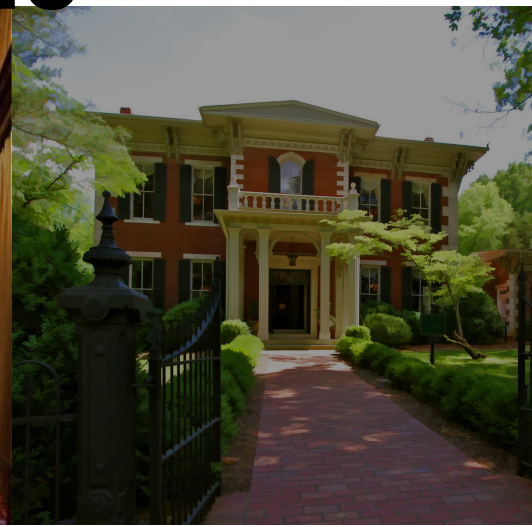


# WHAT WE DO

## SAVING PLACES THAT MATTER

The Heritage Foundation preserves the communities and cultural heritage of Williamson County. We work with area leaders to continually care for historic spaces, treasured landmarks, and cherished local businesses. In short, we save the places that matter in Williamson County, Tennessee.

## OUR DIVISIONS





# HERITAGE

FOUNDATION



# HISTORY. PRESERVATION. COMMUNITY.

In October 2016, Foundation staff, board members and other community leaders created a strategic plan. Over the course of 2017-2018, the Foundation achieved these goals.

1. Improve the finances.
2. Brand the Heritage Foundation and create a tagline.
3. Become more involved with the chamber of commerce, Williamson, Inc.
4. Expand countywide advocacy and be more inclusive.
5. Create a 50th Anniversary film.
6. Complete the Old, Old Jail capital campaign.
7. Increase member involvement by adding quarterly events, a newsletter, lecture series, etc.
8. Advocate against moving the courthouse out of downtown Franklin.
9. Support the Harlinsdale Farm restoration work.
10. Work as a community liaison and green space advocate for the Two Farms project.
11. Support the Franklin trails and riverwalk projects.
12. Build on the African-American and Native American history, story and tourism experience.
13. Grow the endowment.
14. Improve Foundation communications efforts.

## EXECUTIVE & ADMINISTRATIVE STAFF



**BARI BEASLEY**

Chief Executive Officer



**MIRIAM WIGGINS**

Executive Assistant &  
Office Manager

## BOARD OF DIRECTORS

**DAVID GARRETT** President  
**SEAN CARROLL** Secretary  
**PAM CHANDLER** VP of Membership  
**JOSH DENTON** VP of Development  
**BRYAN DOLESHEL** VP of DFA  
**CASSIE JONES** VP of Events  
**CHRIS KNOPF** VP of Finance  
**EMILY MAGID** VP of Preservation  
**JENNIFER PARKER** VP of Franklin Theatre  
**JESSICA REEVES** VP of Next Gen

**DANNY ANDERSON**  
**LISA CAMPBELL**  
**DONNA DOUGLAS**  
**STEPHANIE FARMER**  
**TRACY FRIST**  
**KAY HELLER**  
**KEVIN HERRINGTON**

**DAVID HOPKINS**  
**CHUCK ISAACS**  
**ANN JOHNSON**  
**JEFF LEDBETTER**  
**MARIANNE SCHROER**  
**DR. ALLEN SILLS**  
**NANCY SMITH**



# PRESERVATION





# MANAGING CHANGE OVER TIME

**Expand countywide advocacy and be more inclusive.**

In 2018, the Foundation advocated for the legislature to implement a state historic tax credit and advocated for and financially supported the saving of the Morton-Brittain house in Nolensville.

**Advocate against moving the courthouse out of downtown Franklin.**

Board president David Garrett served on a committee for several months to address this potential threat.

**Support the Harlinsdale Farm restoration work.**

The Foundation connected a major donor prospect to Friends of Franklin Parks regarding a potential gift.

**Work as a community liaison and green space advocate for the Two Farms project.**

The Foundation has stayed involved in conversations with the developer. If the project progresses, leadership has reason to believe that the home count will be less than originally proposed.

## STAFF & VOLUNTEER



**BLAKE WINTORY, PH.D.**

Director of Preservation



**RICK WARWICK**

County Historian, Volunteer

**Support the Franklin trails and riverwalk projects.**

The Foundation continues to collaborate with Friends of Franklin Parks and will support however it can.

**Build on the African-American and Native American history, story and tourism experience.**

The Foundation saved the last unrestored Rosenwald school in either Davidson or Williamson Counties and will be working to restore and rehabilitate it.



“A Rosenwald school is a national treasure and a significant part of the African-American story of the early 1900s. These schools had a profound impact in the advancement of African-American education in our nation. To discover one still remaining in Williamson County and for the Heritage Foundation to take this project on is phenomenal. Preserving this important piece of history is a huge contribution to the rich heritage and history here in our community and the African American Heritage Society is truly grateful to the Foundation for realizing the importance and taking on this tremendous task and funding this project.

- Alma McLemore, President, African American Heritage Society and Franklin Grove Advisory Committee Member



# "WE USED TO SING TOGETHER"

After acquiring the Lee-Buckner school from Ms. Hattie Baines in June of 2018, the Heritage Foundation has been working to capture the stories of the school house, which will be told in exhibition form at the completion of the restoration project. In addition, the Foundation has secured funding for a feature-length documentary film about the history of the school and the restoration process.

Located near Spring Hill, the Rosenwald-funded school taught African-American children from 1926 until 1965. To understand and preserve this history, the organization hosted a round table with previous students and teachers of the school. Special moments were shared including the singing of "Jesus Loves Me," a song the students used to sing together. Renowned oral historian Sheree Scarborough recorded interviews with over a dozen people from the community. Their stories will give voice to this important structure for generations to come.

## RENOWNED SPEAKERS

The Heritage Foundation's first annual preservation symposium, "New Preservation Directions," presented by Renasant Bank, took place on June 2, 2018 with more than 100 preservation leaders in attendance.

The annual program is part of the Foundation's mission of preservation education for adults. The speakers included Vice President of Collections and Research, Old Salem and Curator, Museum of Early Southern Decorative Arts Robert Leath; Executive Director, Tennessee Historical Commission Patrick McIntyre; Co-Founder and Co-Owner, Adelphi Paper Hangings and Trustee and Former Chairman, Monuments Fund Chris Ohrstrom; and Grainger Director of Architectural Preservation and Research, Colonial Williamsburg Foundation Matthew Webster.

2nd Annual Preservation Symposium, "Practical Preservation," Presented by Renasant Bank  
Saturday, June 29, 2019 | Williamson County Enrichment Center  
Speakers: Principal, PlaceEconomics Donovan Rypkema and President & CEO,  
National Main Street Center Patrice Frey

100+  
attendees

3  
internationally  
renowned  
speakers

“

Williamson County is an amazing place. My experience in Franklin was both enlightening and inspiring. The spectacular historic resources, community support and work of the Heritage Foundation combine to create a unique and valuable resource for the community, region and nation. Events such as the preservation symposium allow for the resource to be showcased and open the larger preservation community to the region.

- Matthew Webster, 2018 Symposium  
Keynote Speaker

”





# ONE OF THE LAST HISTORIC BUILDINGS

The Heritage Foundation is proud to have partnered with the Nolensville Historical Society to save the Morton-Brittain House (1870). The historical society overcame numerous obstacles, raising more than \$45,000, of which the Foundation was able to donate \$5,000 due to its successful operating year in 2018, to save the home from devastating development.



“

As co-chairs of the Nolensville Historical Society's Morton-Brittain Project, we can say that the Heritage Foundation's advocacy, direction and support for the saving of this Nolensville historic house have been instrumental in successfully preserving it into the future of Williamson County.

- Greg Bruss & Beth Lothers

”

**\$5K**  
donated

Placed on the National Register in 1988, the Morton-Brittain house is one of only three nationally registered properties within the city. On February 4, 2019, a house mover carefully transported the home three miles into the Nolensville Historic District. While the home is now “saved,” the historical society is still raising funds for restoring the building.

## "I'M JUST A BILL"

For the past two years, the Heritage Foundation has lobbied as part of a network of architectural, contracting, preservation and heritage tourism professionals throughout Tennessee to pass a state historic tax credit. On January 13, 2019, the Heritage Foundation held a panel discussion on the need for a state historic tax credit in Tennessee. Despite much effort, the credits have still not made it into state law. The Foundation will continue to advocate for this tool in the future.





# EDUCATION





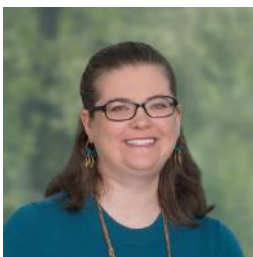
# YOUNG PEOPLE, OLD SOULS

## Heritage Classroom Mission:

The mission of the Heritage Classroom is to use Williamson County's historic resources to support educators, build community and develop future generations of historic preservation leaders.

This past year has been a building year for the Heritage Classroom program. The Foundation team is currently evaluating and redesigning our program offerings. The focus in 2019 is developing a slate of classroom resources that bring a local perspective to bigger historical events. As the Franklin Grove project develops, Heritage Classroom offerings will expand to include new field trips and other historically-based community events and programs.

## STAFF



### JARYN ABDALLAH

Heritage Classroom  
Educator

## JR. HERITAGE ADVISORY BOARD

<b>JOHN DENTON</b>	Chair
<b>DUNCAN KNOFF</b>	Vice Chair
<b>EVEY KNOFF</b>	Secretary
<b>JACKSON ROWLEY</b>	Treasurer



Currently a pilot program through Battle Ground Academy, Jr. Heritage Foundation is a membership-based program featuring quarterly member events designed to introduce students to Foundation projects and other preservation projects around the county. The Foundation plans to open membership to all Williamson County middle- and high-school students in 2020.



“It has been really great to see the Jr. Heritage Foundation actually come to life. Knowing that securing our past is securing our future, I am excited for kids to get involved with the history lessons and tours, community service and other fun activities we have in 2019.

- John Denton, Chair, Jr. Heritage Foundation



**1,300+**

participants engaged in Heritage Classroom log cabin building experience at the 36th Annual Main Street Festival, presented by First Tennessee Bank



# 2 F E E





# PRESERVING CULTURAL HERITAGE

The Heritage Foundation produces four signature events annually. These special events together raise more than **\$1.2 million** each year in unrestricted fundraising which directly supports the preservation and educational mission of the Foundation. Additionally, our signature events serve as a cultural heritage program showcasing the places we have saved and educating visitors and attendees about the importance of protecting the parts of our community we hold most dear.

## STAFF



**KAYLEN CARRICK**

Director of the  
Heritage Ball



**LIZ HALL**

Director of Festivals



**HANNAH JOHNSON**

Festivals Manager



I just want to extend a big THANK YOU to all the Heritage Foundation volunteers. The help you all were able to provide was greatly felt and welcomed! I think it went really well, and the community really enjoyed the weekend!

- Samantha Gidcomb, Consumer  
Relations, MARS Petcare

**\$1.2M**  
raised from  
Foundation  
events



**GERALD ODOM**

Heritage Ball & Office  
Operations Assistant

# 100,000 OF YOUR CLOSEST FRIENDS

Each year, The Heritage Foundation hosts hundreds of thousands of visitors in historic downtown Franklin during our three major street festivals. What began as a tool to drive foot traffic to a diminishing Main Street district has grown to be regionally and nationally distinguished among arts festivals in the country. Today, Franklin's historic district is a thriving place for business owners and residents, and the festivals continue to support the initiatives that helped make it "America's Favorite Main Street."



## 35TH ANNUAL PUMPKINFEST, PRESENTED BY JACKSON

Saturday, October 27, 2018  
66,000+ attendees  
190+ craft & community vendors



## 34TH ANNUAL DICKENS OF A CHRISTMAS, PRESENTED BY FIRST CITIZENS NATIONAL BANK

Saturday, December 8 -  
Sunday, December 9, 2018  
30,000+ attendees  
200+ craft & community vendors



## 36TH ANNUAL MAIN STREET FESTIVAL, PRESENTED BY FIRST TENNESSEE BANK

Saturday, April 27 -  
Sunday, April 28, 2019  
101,000+ attendees  
2,654 app downloads  
265+ craft & community vendors

# 1.5M+

visitors to  
Williamson  
County each  
year

“

Franklin's historic Main Street is one of the most significant tourism draws in Williamson County, primarily because of the incredible charm it exudes. The annual festivals that the Heritage Foundation produces not only create but also showcase that charm which resonates with visitors and leads over 1.5 million visitors to our county each year. We are appreciative of the incredible work the Heritage Foundation does for our community through the preservation and curating of unique events that are appealing to visitors and residents alike.

- Ellie Westman-Chin, President & CEO, Williamson  
County Convention & Visitors Bureau

”





# BLACK TIE-"DYED" BALL



I have a new appreciation for all of the work that it takes to make a beautiful event of this scale. I can't say enough about the Heritage Foundation team and all the effort they put in to bring my vision to life.

- Emily Magid, 45th Annual Heritage Ball Chair & Presenting Sponsor

**750+**  
attendees

**28**  
corporate  
sponsors

**19**  
table hosts

45th Annual Heritage Ball | Saturday, September 15, 2018 | Eastern Flank Battlefield Park  
Chair & Presenting Sponsor: Emily Magid | Patron Award Winners: Andy & Jan Marshall  
King & Queen: Jamey & Jennifer Parker

Over five decades ago a group of Williamson County, Tennessee residents, saddened by seeing antebellum buildings and trees razed, banded together to create The Heritage Foundation of Williamson County, TN. The Heritage Foundation preserves the communities and cultural heritage of Williamson County. We work with area leaders to continually care for historic spaces, treasured landmarks, and cherished local businesses. In short, we save the places that matter in Williamson County, Tennessee. The Heritage Foundation produces the annual Heritage Ball, the longest-running black tie event in Williamson County, to help underwrite these preservation efforts.

The 45th Annual Heritage Ball Chair and Presenting Sponsor was longtime supporter, donor and volunteer to the Heritage Foundation, Emily Magid. Emily's vision for the Heritage Ball was a blast from the past, with a tie-dye theme. It was an evening for the books - colorful fashion, unforgettable floral arrangements, breathtaking decor, memorable moments and more. The night's top honor, the Patron Award, was presented to Andy and Jan Marshall. The 45th Annual Heritage Ball raised hundreds of thousands of dollars for preservation projects, \$90,000 of which was raised in less than an hour during the live auction.

46th Annual Heritage Ball | Saturday, October 5, 2019 | Eastern Flank Battlefield Park  
Chairs: Senator Bill & Tracy Frist

# ENGAGEMENT





# A COLLECTIVE VISION WE ALL SEE

Many community members have claimed "the Heritage Foundation is really doing a lot these days." The truth is the organization has always done a lot, but the general public may not have known about it. The Foundation's marketing and community engagement team is hard at work, ensuring the story of the organization's work and the stories of the community are being shared more widely. As a result, these efforts allow the Foundation to engage more volunteers, members and donors.

## STAFF



**MEG HERSHEY**

Senior Director of  
Marketing & Community  
Engagement



**ALEX HAYES**

Communications  
Manager



**HEATHER KANTOR**

Database & Volunteer  
Manager

## NEXT GEN ADVISORY BOARD

**JESSICA REEVES**  
**ABBY BENSON**  
**CATHERINE COLEY**  
**KELSEY LAMKIN**  
**KATIE LILLARD**  
**TUESDAY SLIGH**  
**SONNY TOPIWALA**

Chair  
Secretary  
Membership Chair  
Preservation Chair  
Events Chair  
Vice Chair  
Finance Chair

**SYDNEY BALL**  
**CHRISTEN BOHANON**  
**EMILY CARROLL**  
**ADAM DIETRICH**  
**SARAH LOCKER**  
**SARAH SMITH-OGLESBY**

### Next Gen's Mission:

To engage community members, ages 21-40, in the mission of the Heritage Foundation through education in local history, preservation of places that matter and furthering a sense of community.

In 2018, Next Gen's goal was to raise funds for the Lee-Buckner school house project. The group did this through the 1st Annual Cornhole Tournament, raising over \$1,000 and supporting the Foundation's festival events by selling different beverages, also raising several hundred dollars.

In 2019, Next Gen is working toward greater engagement with prospective members, planning the 2nd Annual Cornhole Tournament to be held at Leiper's Fork Distillery on May 18, 2019 and the new Late Party in conjunction with the 46th Annual Heritage Ball.



# THEY DON'T HAVE THE TIME. THEY HAVE THE HEART.

This year marked an exceptional year of volunteerism with the Heritage Foundation of Williamson County. The organization saw growth from community citizens donating their time, talents and resources to enhance its preservation programs, festivals and member events. Some key accomplishments for the past year were:

- More volunteers than ever before assisted with the festivals, making these events run more smoothly
- The implementation of a new volunteer check-in and tracking system, which made it easier for volunteers to sign up for and track their volunteer hours
- Better volunteer orientation and more one-on-one communication, which led to greater feedback from the volunteers regarding events and responsibilities

## NO "MEMBERS ONLY" JACKETS, JUST EVENTS

Increase member involvement by adding quarterly events, a newsletter, lecture series, etc.

In 2018, the Foundation rolled out the first full year of member-only events and a regular member e-newsletter. Members enjoyed an exclusive movie night at The Franklin Theatre, lectures by County Historian Rick Warwick and several historic home tours. In addition, the Foundation hosts quarterly member open house events at their office to give tours of the historic jail and encourage members to meet and mingle with the staff.

**850+**

individual & family  
members

**50+**

Next Gen  
members

**80+**

business  
members outside  
DFA district

**20+**

Jr. Heritage  
members  
(pilot program)

**\$120K**

value of  
volunteer  
services

**5,300+**

volunteer  
hours

**850+**

volunteer  
shifts

“

Volunteering for such things as the Downtown Franklin Association, the Economic Vitality Committee, Franklin Locals, the Holiday Lighting Committee, the Visitors Center, as well as various festivals and events, has been a most satisfying way of giving back to my community. I'm passionate about Franklin and all of Williamson County, for the quality of life that it offers to all".

- Tom Golden, Volunteer





# "WHO PUTS ON THE FESTIVALS?"



**48M+**

potential reach of earned media

**\$450K+**

ad value of earned media

**184K+**

website pageviews

## BRANDING

Brand the Heritage Foundation and create a tagline.

During the brand refresh in 2017, the Foundation developed the tagline "HISTORY. PRESERVATION. COMMUNITY." and is actively implementing that in its communications efforts. After the refresh, the Foundation began making strides to activate the new brand, including streamlining and more actively "owning" the festivals brand. In early 2019, Foundation staff created a brand architecture that will better showcase the holistic breadth of sub-brands under the Foundation parent brand.



**HERITAGE FOUNDATION**  
WILLIAMSON COUNTY, TN



## OWNED MEDIA

Improve Foundation communications efforts.

Through many owned media channels - social media, email marketing, blogs, website, etc. - the Foundation has activated communications tactics to the general public and its member, donor and volunteer constituencies.

## EARNED MEDIA

Following the hire of an internal communications manager, the Foundation actively services about two to three press releases a month, garnering, if paid for, hundreds of thousands of dollars of earned media coverage in a year.

## PAID MEDIA

The Foundation continues to work with paid media partners to receive maximized value with its advertising investments. Thus far in 2019, more than \$150,000 of advertising value has been secured with about 10% of that invested.



Facebook Followers:

May 2018: 8,686

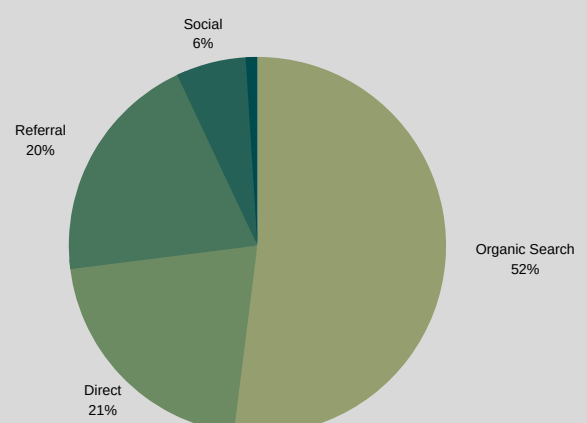
May 2019: 9,990

Facebook Likes:

May 2018: 8,833

May 2019: 9,538

Website Traffic Sources



# FINANCIALS





# PAYING IT FORWARD

## STAFF



### WENDY DUNAVANT

Senior Director of Finance  
& Administration

Improve the finances.

In 2018, total revenue increased \$6.1 million over 2017 results. The increase was due primarily to a 2100% increase in contributions and a 38% increase in revenue from program services. Total expenses for the organization increased approximately 5% in 2018 as well. Overall net profit increased to \$5.8 million in 2018 from a loss of \$93,000 in 2017.

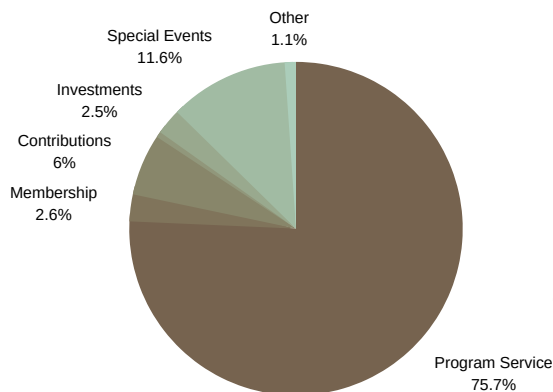
## EXPENSE TO REVENUE (%)

	2017		2018	
Programs	3,188,310	82%	3,246,785	32%
Fundraising	293,771	8%	305,000	3%
Management and General	496,111	13%	625,000	6%

## REVENUES AND GAINS

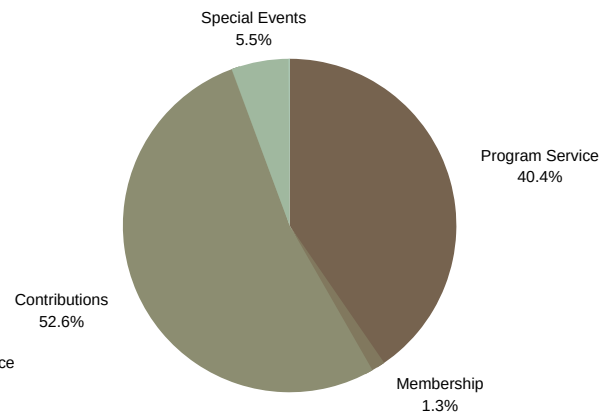
### 2017

JANUARY - DECEMBER

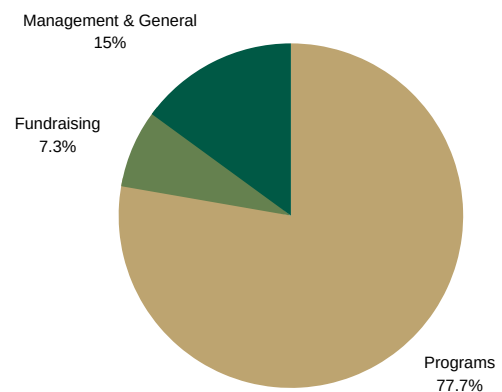
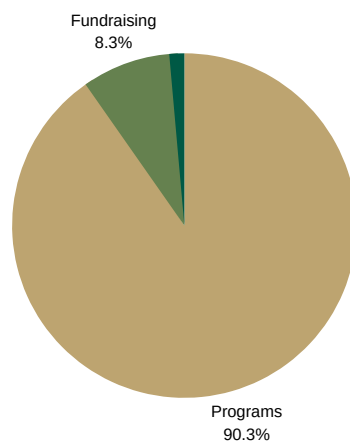


### 2018

JANUARY - DECEMBER



## EXPENSES



## NET

(\$93,000)

\$5,800,000

# DOWNTOWN

FRANKLIN ASSOCIATION



A Division of the Heritage Foundation  
of Williamson County, TN



# IT TAKES A SMALL TOWN

## Downtown Franklin Association Mission:

To revitalize Historic Downtown Franklin in the context of historic preservation and to make our historic downtown commercial district America's favorite Main Street.

## Downtown Franklin Association Vision:

To achieve the mission through promotion of the historic district, protection of its historic character, provision of organizational structure to achieve goals and focus on the economic development of the district.

## STAFF



### JILL BURGIN

Executive Director of the Main Street Program

## ADVISORY BOARD

### BRYAN DOLESHEL

Interim Chair/ Vice Chair

### JOHN BOND

Design Chair

### JONI COLE

Economic Vitality Chair

### EMILY MARSHALL

Secretary

### RYAN MCKINNEY

Organization Chair

### BRIAN MOYER

Treasurer

### JULIE WALTON-GARLAND

Promotions Chair

“

Local businesses are the heart and soul of downtown Franklin. The Heritage Foundation and the Downtown Franklin Association work tirelessly to make this a place where businesses can thrive. When one walks into Franklin, they instantly experience the historic charm... and are as equally impressed with the beautiful streetscape and community of businesses that call it home. As a family business that has called Main Street home for over 45 years, I can attest to the positive work these organizations have done to support local business.

- Julie Walton-Garland, owner of Walton's Jewelry and Promotions Chair, DFA

”



# ONWARD AND UPWARD

Last year was a year of transition for the Downtown Franklin Association (DFA), one in which the organization functioned for six months without an executive director. As the DFA's parent organization, the primary goal of the Heritage Foundation for the DFA was to fill that position with a qualified full-time candidate. At the end of the year they did so by hiring outgoing Brentwood Mayor Jill Burgin to begin work in January 2019 as Executive Director of the Main Street Program.

Because of that transition, the goals of 2018 focused primarily on maintenance of the DFA operations, while 2019 goals are focused on organization. This includes a review of the organizational chart relative to its parent organization the Heritage Foundation, auditing operating procedures, cultivating the prospective membership list, reviewing membership requirements and bolstering membership benefits. In 2019, Burgin also wants to reorganize membership pricing tiers, support festivals production and logistics to better showcase downtown businesses, brainstorm membership activities and streamline member communications and social media efforts. All of this is being undertaken with the goal of serving as a clearinghouse and advocacy agency for downtown businesses as well as to providing an organizational framework within which small businesses can contribute to the local economy while improving their own bottom line.

**176**

members

**\$10-\$45**

per square  
foot, rental  
range in  
downtown

**+42**

net gains and  
losses in jobs  
downtown

**3.9%**

ground floor  
vacancy rate  
downtown

“

By intentionally preserving the history and charm of Main Street and at the same time encouraging appropriate new developments, the Downtown Franklin Association continues to do a wonderful job in blending the old and the new. The DFA plays a key role in sustaining the growing economy of Franklin and is a great model for all other downtown associations.

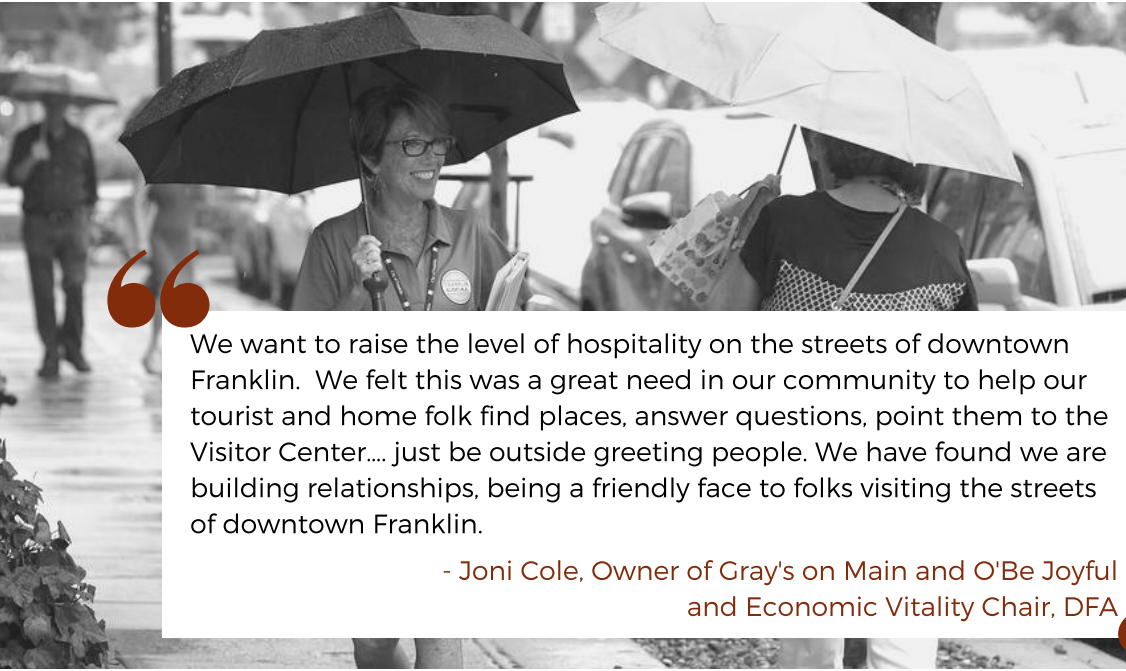
- Bryan Doleshel, Chief Operating Officer,  
Williamson, Inc. and Interim Chair, DFA

”





# CONCIERGE ON THE STREET



We want to raise the level of hospitality on the streets of downtown Franklin. We felt this was a great need in our community to help our tourist and home folk find places, answer questions, point them to the Visitor Center.... just be outside greeting people. We have found we are building relationships, being a friendly face to folks visiting the streets of downtown Franklin.

- Joni Cole, Owner of Gray's on Main and O'Be Joyful and Economic Vitality Chair, DFA

**60+**  
trained  
volunteers

**200+**  
volunteer  
hours

Franklin Locals is a greeter program consisting of on-the-street volunteers who answer questions, give recommendations and share the story of Franklin with visitors and residents alike. The Franklin Locals program was created with a desire to offer guests Southern hospitality through the recommendations and expertise of Franklin community members with the following mission: Volunteer greeters provide an amazing welcome with authentic Franklin hospitality to all who visit.

As visitors stroll the streets of historic downtown Franklin, they can clearly identify a Franklin Local volunteer by the "Franklin Local" patch on their clothing, an official City of Franklin name tag as well as a smile and friendly attitude. Guests are invited to ask questions about Franklin and interact with a local who will offer insight to the community.

Now in its second year, the program boasts approximately 60 Franklin Locals volunteers who go out in two-hour shifts from Friday through Sunday to welcome visitors to downtown Franklin. They assist these visitors by giving directions, sharing their knowledge of Franklin and pointing them in the direction of restaurants, museums, tours and more. They function similar to a concierge on the streets.



# THE FRANKLIN

THEATRE



A Division of the Heritage Foundation  
of Williamson County, TN



# BEST 300-SEAT MUSIC VENUE

## The Franklin Theatre Mission:

To create memorable experiences that entertain, inspire, enrich and connect our patrons, performers and communities.

## The Franklin Theatre Vision (Five Years):

### Innovative and Compelling Programming

We will be the best 300-seat music venue in the world. Programming priorities reflect that goal as we continue to seek high-level artists from a variety of genres that inspire and touch a diverse audience of patrons. We will also create a unique syndicated broadcast concept that allows our unique experience to touch people around the world. We will also create a signature annual event which is both a fundraising vehicle and enriches the cultural landscape in the community in ways no others can or currently do. We will continue to make the facility available for rental. We will also partner with other arts organizations and charities and make the facility available for important community functions. We will also continue our "Movies on Main" tradition. We will inspire, surprise, amaze and find ways to impact the quality of life and provide extraordinary services in ways we didn't even know were needed or possible.

### Fundraising and Legacy Giving

We will strengthen the financial health of the theater by raising \$500,000 annually and embarking on a legacy (estate) giving program that leads to a \$3 million endowment. It is important to broaden the base of supporters to over 300 people and/or organizations.

### Foster Downtown Growth and Music Offerings

We envision economic growth opportunities for our neighbors and will encourage increased business hours for merchants and a diverse and distinctive brand of shopping, eating, entertainment and places to stay for visitors. We will be active with our parent organization, the Heritage Foundation as well as the Downtown Franklin Association, Chamber of Commerce and other groups to help lead our community to the right opportunities that respect our history while fostering a bright future.

### Customer Satisfaction

Creating great experiences for our patrons and performers shall always be one of our highest priorities and we will make it a cornerstone of all we do, from the training of personnel to the policies and systems they engage with. We will regularly gauge their satisfaction and seek to exceed expectations rather than simply meet them.

## KEY STAFF

<b>DAN HAYS</b>	Executive Director
<b>CLAIRE ARMBRUSTER</b>	Programming
<b>BECKY BAUER</b>	Marketing and Community Relations
<b>LEAH GALLAGHER</b>	Operations
<b>RICHARD KORBY</b>	Technical & Facilities
<b>EMMA SHARP</b>	Ticketing & Hospitality

## ADVISORY BOARD

<b>KELLY FREY</b>	President	<b>DAVID GARRETT</b>	Ex-Officio
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<b>ROBERT DEATON</b>		<b>PAUL POLYCARPOU</b>	

# IT'S ABOUT A FEELING

## 2018 PROGRAM HIGHLIGHTS

Taj Mahal  
Indigo Girls  
Bobby Bones  
Steven Curtis Chapman  
Patty Griffin  
The Bacon Brothers  
Chubby Checker  
Charles Esten  
BJ Thomas  
Fisk Jubilee Singers  
Gary Puckett & The Union Gap  
Ricky Skaggs & Kentucky  
Thunder  
The Righteous Brothers  
Joy Williams  
Karla Bonoff  
Herman's Hermits  
TobyMac  
John Waite  
Bruce Cockburn  
Jeffrey Steele  
Rodney Crowell  
Henry Cho  
AJ Croce  
David Archuleta  
Five For Fighting  
Asleep At The Wheel  
The Bellamy Brothers

The Glenn Miller Orchestra  
Lee Greenwood  
Exile  
Chris Knight  
Doyle Lawson & Quicksilver  
Steve Dorff  
Nashville Elvis Festival  
Ernie Haase & Signature Sound  
The Zmed Brothers  
Lee Roy Parnell  
Gary Morris  
The Gatlin Brothers  
George Winston  
Beth Nielsen Chapman & David  
Wilcox  
Restless Heart  
Pat Boone  
Gretchen Peters  
Crystal Bowersox  
Hal Ketchum  
Marty Stuart  
Gateway Chamber Orchestra  
Riders in the Sky  
Charlie Worsham  
James Gregory  
Radney Foster  
Mary Gauthier  
Pokey LaFarge

Joan Osborne  
Dailey & Vincent  
Joshua Radin  
Michael Martin Murphey  
Kelly Willis  
Deborah Allen  
Lorrie Morgan  
Louis York & The Shindellas  
Lynda Carter  
Ray Wylie Hubbard  
John McEuen  
Martin Sexton  
Suzy Bogguss  
Mike Farris  
Pam Tillis  
Tab Benoit  
John Schneider  
Paul Thorn  
Jimmie Vaughan  
Pure Prairie League  
Rodeo & Juliet  
Sierra Hull  
Street Corner Symphony  
Renee Armand  
Doyle & Debbie Show  
Bishop Gunn  
The Establishment

100+

"1937 Club"  
members

“

The Franklin Theatre is a venue second to none. The acoustics, the seating, the history, and the small-town charm make this intimate setting our favorite place to see a show. When you step into the Franklin Theatre you are able to celebrate the past, reconnect with friends and enjoy the present.

- John and Margie Maher

”





# DOING WELL & DOING GOOD

## 2018 ACCOMPLISHMENTS

JANUARY 1 - DECEMBER 31, 2018

TYPES OF EVENTS	NUMBER OF EVENTS	NUMBER OF TICKETS
Movies	334	29,376
Music & More	86	24,809
Live Theater	39	8,766
Rentals (Full Day)	35	9,114
Rentals (Half Day)	43	6,221
Community Events	34	3,688
<b>TOTALS</b>	<b>571</b>	<b>81,974</b>



### DELIVERING EXTRAORDINARY CUSTOMER SERVICE

**98.5%**

Met or Exceeded Expectations

### QUALITY PROGRAMMING



**96.1%**

Music Programming is Above Average or Excellent



**93.4%**

Movies are Above Average or Excellent



### OUR PATRONS ARE OUR CHAMPIONS

**81.6%**

Extremely Likely to Recommend to Others



### ECONOMIC IMPACT OF OVER \$7.4 MILLION ANNUALLY

**17.3%**

Tickets Sold Outside Middle Tennessee



### HELPED RAISE OVER \$5.5 MILLION FOR IMPORTANT CHARITIES SINCE 2011

### SPONSORS

Jackson  
Animalia Health & Wellness  
Puckett's Grocery & Restaurant  
Franklin Synergy Bank  
Mr. and Mrs. Pierre Pons

# FRANKLIN GROVE

ESTATE & GARDENS

FRANKLIN  
*Grove*  
ESTATE & GARDENS



A Division of the Heritage Foundation  
of Williamson County, TN



# LARGEST PROJECT IN OUR HISTORY

In August 2018, the Heritage Foundation announced its intent to purchase the former O'More College of Design property. In December 2018, in a letter to Belmont President Dr. Bob Fisher, CEO Bari Beasley expressed gratitude for giving the Foundation the option to purchase the campus. A target date for closing on the property was set for the first quarter of 2019. In February 2019, that dream became a reality, and the Foundation took ownership of the property.

Currently in the leadership phase of the capital campaign for the project, the non-profit Heritage Foundation plans to restore and rehabilitate the five-acre site into a multi-use campus with new educational offerings, publicly displayed collections, beautiful gardens and unique private event space. Williamson, Inc. will create the Innovation Center, an idea and entrepreneurship hub in the Victorian mansion on the property.

## STAFF



**SHANNON LAPSLEY**

Director of Special Projects  
& Campus Planning

## ADVISORY COMMITTEE

**DANNY ANDERSON**

**TOM ATEMA**

**BARI BEASLEY**

**JOHN BOND**

**TRACY FRIST**

**DAVID GARRETT**

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**SHARON MCNEELY**

**MAYOR KEN MOORE**

**ELLEN MORE**

**SONDRA MORRIS**

**ED SILVA**

**ELLIE WESTMAN-CHIN**



“

The recently acquired O'More property is a milestone for Franklin's preservation efforts and a great tribute to the importance of this community's effort to preserve its past and prepare for its future. The renaming as the Franklin Grove reaches into the rich history of the property. The Heritage Foundation's leadership sets the bar high for the future and shows other communities the importance of preservation.

- Franklin Mayor Ken Moore

”

# WHAT'S IN A NAME?

In preparing to rename the campus, Heritage Foundation Director of Preservation Dr. Blake Wintory, Ph.D. and County Historian Rick Warwick heavily researched the property looking for something special to bring to the surface. In the Williamson County archives, everything started to come together with an advertisement, ca. 1834.

The advertisement described the Female Seminary at Franklin Grove as “Near the Town of Franklin” and offering “Female Education including...Needle-work on Muslin, Canvas, Bolting...Tambour, Lace-work, Embroidery on Satin and Velvet, Drawing, Painting on Paper and Velvet [and] Music.”

In 1829, the Rev. Canelm H. Hines and his wife Sarah purchased 30 acres of land from the estate of William Murfee. In December 1832, the couple began operating the Female Seminary. According to Warwick, Franklin Grove was the name of the Hines farm that extended along the west side of the Harpeth River and Leesburg Pike. This land included part of what was most recently O'More College of Design. It included the Hines family home, now the location of the ca. 1897 Berry (Fleming-Farrah) Mansion.

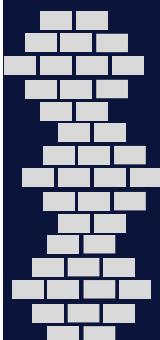
Rev. Hines is listed as a farmer in the 1850 Census; however, his son-in-law, James A. McNutt is listed as a teacher in the 1860 Census. County records suggest the school operated up until the Civil War began. After the Civil War, Sallie Hines McNutt returned to find a Freedmen's School in her home. By August 1866, James McNutt reopened his school calling it Buena Vista English and Classical School.

**\$18-20M**

estimated  
total

**\$8M**

capital funds  
raised to date



“

As the fastest growing county in the state of Tennessee, Williamson County has seen a considerable uptick in local entrepreneurial activity. 30% of all Inc. 5,000 companies in the state of Tennessee call Williamson County home, and Williamson, Inc. is regularly approached about offering entrepreneur services and having a “front door” for the startup community. Due to the rapidly growing job market, Williamson County office space has reached a premium that can be difficult for start-up companies to afford. By offering temporary office space to scalable startups, we increase the likelihood of keeping these businesses and the jobs they create in Williamson County. The downtown Franklin campus offers a unique opportunity, as a highly desirable location with a creative ambiance. The partnership with the Heritage Foundation makes the project financially viable for Williamson, Inc., and as historically preserved property we can charge well below the market rate to businesses using the space.

- Matt Largen, President & CEO, Williamson, Inc.

”





# \$8 MILLION IN EIGHT MONTHS



HERITAGE FOUNDATION SECURES OPTION TO PURCHASE PROPERTY FROM BELMONT UNIVERSITY FOR \$6 MILLION.

FOUNDATION EXERCISES OPTION TO PURCHASE AND ANNOUNCES FIRSTBANK AS LENDING PARTNER.

FOUNDATION ANNOUNCES PARTNERSHIP WITH WILLIAMSON, INC. ON INNOVATION CENTER.

**AUG  
'18**

**DEC  
'18**

**DEC  
'18**

**FEB  
'19**

FOUNDATION CLOSES ON THE PROPERTY AND ANNOUNCES CAMPUS ADVISORY COMMITTEE.

**MAR  
'19**

FOUNDATION HITS \$8 MILLION AND NAMES PROPERTY FRANKLIN GROVE ESTATE & GARDENS.

**APR  
'19**

FOUNDATION HIRES DIRECTOR OF SPECIAL PROJECTS & CAMPUS PLANNING TO MANAGE THE PROJECT.

**MAY  
'19**

FOUNDATION UNVEILS NEW LOGO AND POSSIBLE RENDERINGS AND NAMES CAPITAL CAMPAIGN CHAIR.





RECOGNITION

# LEHEW MAGID BIG HOUSE FOR HISTORIC PRESERVATION

WITH GRATITUDE TO ALL DONORS WHOSE OUTSTANDING GENEROSITY DEMONSTRATED  
A COMMITMENT TO THE HISTORY OF YESTERDAY AND THE VISION FOR TOMORROW

## MAJOR DONORS

CALVIN AND MARILYN LEHEW

EMILY A. MAGID

FirstBank • Roderick and Kay Heller • Pamela L. Lewis • Valere Menefee • Middle Tennessee Electric Customer Care, LLC • Tim Pagliara, CapWealth Advisors, LLC  
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## PRESERVATION LEADERS

Denise and Mike Alexander • Danny and Teresa Anderson • John Thomas Atema • [Name] and Ernie Bacon  
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Connie and Carl [Name] • Kelly Harwood • [Name]  
James Kreider • [Name]  
John [Name] • Jan and Andy Mars





# NAMING THE BIG HOUSE



“

The importance of the gift from Calvin and Marilyn LeHew and Emily Magid cannot be overstated. It not only paid off the debt for our historic office building, but most importantly, it allowed our CEO and board to start dreaming of the future. The direct result of their generosity is the Franklin Grove Estate & Gardens project.

- David Garrett, Board President

”

## \$900K+

paid off the totality of the loan on the Old, Old Jail project

### Complete the Old, Old Jail capital campaign.

In February 2018, Calvin and Marilyn LeHew and Emily Magid stepped forward to pay off the rest of the loan on the Old, Old Jail project, allowing the Foundation to move forward with the Franklin Grove project.

In October 2018, the LeHew Magid Big House for Historic Preservation was formally dedicated.

# THANKING OUR SPONSORS

In November 2018, the Foundation hosted more than 50 people, representing numerous corporate sponsors at the partner-level and above, at the historic McConnell House for an evening of celebration.

There was fellowship between sponsors, board members and staff. CEO Bari Beasley walked through key accomplishments and milestones.

The end-of-year sponsor party will be an ongoing annual event,



## HERITAGE FOUNDATION OF WILLIAMSON COUNTY, TN

## LEADERSHIP SOCIETY OF GIVING

## TRAILBLAZERS

\$50,000+

Anonymous  
The Honorable Bill and  
Tracy Frist  
Rita Rae Gathmann Estate  
Mr. and Mrs. Calvin LeHew  
Ms. Emily Magid  
Ms. Sondra Morris

## VISIONARIES

\$25,000 - \$49,999

Mr. and Mrs. Jim Stark, III

## FOUNDERS

\$10,000 - \$24,999

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HERITAGE FOUNDATION

\$10,000+

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Kevin Wimpy, WTVF-TV.



**HERITAGE  
FOUNDATION**  
WILLIAMSON COUNTY, TN



HISTORY. PRESERVATION. COMMUNITY.  
WILLIAMSONHERITAGE.ORG

Be part of the story. Join us in our work to save  
the places that matter in Williamson County.

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