



Santa Barbara Trust for Historic Preservation

Annual Report 2015



Terease Chin and husband Ken Yamamoto with Soldados Martin Meza and Roger Knox at the Candlelight Dinner. Photo by Anna J. Photography.

### From the President

Welcome to the 53rd Annual Meeting of the Santa Barbara Trust for Historic Preservation. The Trust had another active and successful year in 2015 and we look forward to continuing this trend in 2016.

The annual meeting is a good opportunity for SBTHP to provide informative reports to its membership on its accomplishments in the past year.

There were several celebrations that highlighted 2015. On March 26th, 2015 a small ceremony of fifty observed the unveiling of the Prince's Plaque at El Presidio de Santa Bárbara State Historic Park. The plaque was installed on the exterior of the Presidio's northwest corner defense wall, which has been named The Prince's Wall. This special event commemorated the visit of Crown Prince Felipe of Spain, now King of Spain, to Santa Barbara on November 15, 2013. Joining the ceremony was Spanish Consul General Javier Francisco Vallaure. The beautiful plaque was by made by descendant Jeannie Davis.

On April 24th, 2015 SBTHP staff and volunteers put together another memorable event. The historic Presidio Chapel was transformed into an evening of romance and elegance as ninety guests bathed in the glow of a candlelight dinner by two renowned chefs: Michael Blackwell and David Reardon. The evening was highlighted with the successful fundraising of \$80,000 for the 4x4x4 campaign dedicated to the Visitor Center. The Candlelight dinner was a part of a three-prong event celebrating Santa Barbara's 233 years. The following afternoon the celebration continued with a Founding Day Festival and later in the evening, the Rancho Roundup. The hard work and dedication of David Bolton, Linda Rosso, Melissa Chatfield, Debby Aceves and Keith Mautino contributed to its success. We look forward to hosting more candlelight dinner events in the Presidio Chapel in the future. The beautiful painting featured on the front of the Annual Report program was painted by Charles G. Burggraf and was auctioned during dinner.

Every year generous grants and donations continue to allow the Trust to bring quality public events and educational programs to the community. Here are some notable results:

- Rehabilitation of the historic Alhecama Theatre which will be used for SBTHP's public programs and be made available for community use.
- Completed the design phase for a site wide signage program for El Presidio SHP which will be delivered and installed in early 2016.
- Provided transportation stipends for 700 third grade students selected by lottery to participate in Early California Days.
- Installation of a beautiful new wooden gate at the northwest corner of the Presidio.
- The Presidio hosted a record number of events: twenty-four weddings, eight wedding receptions, fifteen co-sponsored/nonprofit events, and four corporate events.

SBTHP is honored to receive generous support from many local foundations and we look forward to their continued support. Take a few minutes to read the Development Report for more details.

The continued success of SBTHP lies with its staff and volunteers. I have been so fortunate to work with a dedicated and committed Board in 2015. My sincere appreciation and heartfelt thanks to each of them for the devotion of the time and energy they have given to the organization this past year.

Lastly, our Executive Director, Dr. Jarrell Jackman, has retired after serving in this capacity for the past twenty-eight years. We are sincerely grateful for his years of service to SBTHP and for all that he has accomplished during his long and honored tenure. He truly embodied the visionary ambitions of Pearl Chase, who founded the organization in 1963. Like Pearl Chase, his legacy will be long remembered and treasured.



/ escase Chin
Terease Chin
Board President



Jarrell and Michele Jackman.

### From the Executive Director

This annual report captures SBTHP in action in 2015. I would like to spotlight just a few of the highlights of the past year. At the top of my list is finishing the adobe garden walls in the back yards of the Presidio Northwest Corner, some of the bricks of which I recently helped lay. Thus the Presidio project marches on, and I am sure Pearl Chase, our founder, would approve. Second, restoration of the Alhecama Theatre, which I have taken great pride in helping bring to fruition and is turning out to be yet another important achievement of SBTHP. Third, signing a ten-year extension of our lease-back agreement with State Parks for operation of the Santa Inés Mission Mills State Property. Fourth, the excellent management of our rental properties by Rob Ramirez of Meridian Group. Fifth, the moving Veterans Day Ceremony at the Presidio on November 11, honoring our local veterans. Many of the Presidio descendants attending spoke eloquently of their military service.

For me, loyalty is one of the great human virtues—that is, staying loyal to noble causes and to the people who share your common vision. Perhaps two of the people who best represented this great virtue were SBTHP Life Honorary Trustees Dr. Garvan Kuskey and Vivian Obern who died this past year, but to their last days they both remained absolutely dedicated to the Presidio project. I could call out many other loyalists, but one of them who especially comes to mind is Michele Jackman, described by *Executive Female* magazine in its cover story on her years back as a "Management Whiz." For thirty-five years as an unremunerated volunteer, she has committed her unstinting loyalty to SBTHP and helped the organization in so many ways.

While SBTHP has other interests, and in fact there is significant breadth and depth to each of the primary areas of our preservation and education commitments, the strength of this highly successful nonprofit is its continued loyalty to its common vision of restoring, protecting, and interpreting the Santa Barbara Presidio, Casa de la Guerra, and the Santa Inés Mission Mills.

Semper Fi!

Janelle & Jackman

Dr. Jarrell Clark Jackman
Executive Director

## <del>comence comence</del>

## El Presidio de Santa Bárbara State Historic Park & Business Affairs

Sally Fouhse



The Santa Barbara Trust for Historic Preservation continues to partner with the State of California Department of Parks and Recreation on the reconstruction, restoration, interpretation, and daily management of El Presidio de Santa Bárbara State Historic Park. This unique partnership between the Trust and California State Parks provides quality programming and experiences to visitors to El Presidio, at no cost to the State.

SBTHP manages several rental properties located on State-owned land surrounding El Presidio, and uses net rental income to operate the State Park. Additional operational income is derived from admission fees to enter the Park. For restoration and reconstruction projects, SBTHP raises funds through grants and donations. Once the projects are complete, their ownership automatically transfers to the State, benefiting residents and visitors alike.

New in 2015 is a pilot program involving renting out parking spaces in State Parks lots after hours and on weekends. Revenue from this type of venture provides valued unrestricted income to support programs and general operations.

SBTHP also owns and operates the Casa de la Guerra, the location of many events, both private and public, in 2015. Recent significant donations have enabled SBTHP to increase hours of operation at the Casa, so that more visitors to downtown Santa Barbara can enjoy this lovely site. Also in 2015, Standing Sun Winery opened a wine tasting room in the Casa's Bodega. Stop by to sample local wines in this historic setting.

SBTHP is pleased to report the highest gross sales to date at its annual summer fundraiser, Casa Cantina, now in its fourteenth consecutive year. We value our continued partnership with Plus One Events, and appreciate the contribution of dozens of volunteers to make the event a success.

SBTHP is a complex, fiscally stable nonprofit. Prudent management of Trust and State-owned assets by dedicated Board and staff members results in successful events and programs that are sustainable over many years. Once again, we thank our partners at State Parks for working with us to provide quality programs to our visitors.



### <del>comence comence</del>



Northwest Corner gate. Photo by Michael H. Imwalle.



# Archaeology & Restoration

Michael H. Imwalle

The Archaeology Department continues to work with the Restoration and Major Gift Committees to advance the 4x4x4 Capital Campaign. A generous grant from the California Missions Foundation is advancing the archaeology of the second defense wall. Findings from this excavation will help guide the plans for its reconstruction. This investigation will also lay the groundwork for relocating the Bonilla House. We advanced the Northwest Corner project by finishing the new gate and building the interior yard walls.

Work continued on the rehabilitation of the Alhecama Theatre. Thanks to generous grants from the Mosher Foundation, Santa Barbara Foundation, and the California Community Foundation the 1925 theatre has undergone numerous improvements including the completion of an accessible entrance patio, installation of accessible doors and hardware, and installation of a new HVAC system. The new venue will be used for SBTHP's public programs and be made available for community use.

Anacapa School student interns planted and harvested crops, and built trellises and planters in the Presidio Heritage Gardens. We also saved seeds and propagated cuttings from heritage trees. The new chicken coop and six black Minorcan hens are popular new additions to the heritage gardens. Staff continued to work with California State Parks Channel Coast District staff and the Santa Inés Mission Mills Committee on developing Interim Use Guidelines (IUG) for the State Park Property by contracting with Suzanne Elledge Planning & Permitting Services to advance the IUG and Naming and Classification processes. A draft of the IUG will be circulated for review in early 2016.

Bricklaying at the Northwest Corner garden walls with Isidro Pacheco Cruz and Jarrell Jackman. Photo by Michael H. Imwalle.

# Development

Christa Clark Jones

SBTHP is grateful for strong community support of events and programs in 2015. The Prince's Plaque was installed on the Northwest Corner wall of the Presidio on March 26. The plaque commemorates the visit of Crown Prince Felipe of Spain, now King of Spain, to Santa Barbara in 2013. Special guests and dignitaries celebrated its addition to the wall, a place where future plaques will be on display to recognize generous donors.

SBTHP presented one of our most memorable fundraisers, the Candlelight Dinner in the Presidio Chapel on April 24. Part of the *Celebrate Santa Barbara* series of events, this magnificent event warmed the hearts of many and raised funds to support the 4x4x4 Campaign. In addition at Rancho Roundup, guests enjoyed an evening of live music and dance to celebrate Santa Barbara's history.

At the Tamale Fest on September 27, SBTHP honored the Outhwaite Foundation for its outstanding support. A ribbon cutting officially recognized the new gate outside the Pico Adobe.

SBTHP is honored to have received generous support from many local foundations and organizations including the California Community Foundation, California Missions Foundation, California State Parks Foundation, George Griffiths and Olive Griffiths Charitable Foundation, Henry W. Bull Foundation, John and Beverly Stauffer Foundation, Montecito Bank & Trust, Mosher Foundation, San Pasqual Trust, Santa Barbara County Arts Commission, Santa Barbara Foundation, and The Towbes Foundation.

It has been a bright year thanks to our friends and members who truly illuminate Santa Barbara and support SBTHP's mission to preserve the city's unique history.



Candlelight dinner in the Presidio Chapel. Photo by Anna J. Photography.



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Cloud Dance by Chris Chapman, featured in the Art of Preservation exhibit.



# Historic Resources Division

Anne Petersen, Ph.D.

The Historic Resources Division is proud to have partnered with several local museums and Sullivan Goss Gallery in 2015 as part of a community-wide celebration of artist Ray Strong. SBTHP's contribution to the project, *The Art of Preservation: The Oak Group Remembers Ray Strong*, was produced in collaboration with local painters' collective the Oak Group, who count Ray Strong as one of their founding members. The exhibit included paintings by Oak Group members in memory of and tribute to Ray Strong, and several Ray Strong paintings collected by members of the Oak Group. In addition, Guest Curator Rose Thomas has completed the research phase for our next exhibit, on the architect Reginald Johnson's Santa Barbara-area projects.

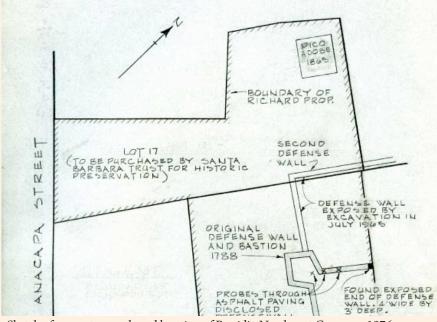
Final designs for the El Presidio SHP exterior signage project were approved for fabrication in late fall of this year, and the signs will be delivered in early 2016. We accepted several new objects into the curatorial collection, notably a dress formerly owned and worn by Pearl Chase. Historic Resources staff were also pleased to assist the Genealogy and Descendants committee with their annual luncheon on October 17.

## Presidio Research Center

Anne Petersen, Ph.D.

In 2015 the Presidio Research Center was accessed by research patrons via phone, email, in-person appointments and through material posted on the Online Archive of California (OAC). This year, researchers viewed finding aids for archival material posted on OAC in the Research Center collections 2,500 times. SBTHP faced a challenge in 2015 when the software used to post those finding aids was no longer supported. Contract Librarian Laurie Hannah found a solution with a negotiated group rate for ArchiveSpace software, which fulfills that function. It also enhances the online presence for the Research Center's finding aids with a standalone web interface.

Hannah and contract librarian Lisa Marsh cataloged books and processed manuscript and photograph collections. Hannah completed processing the Vie Obern papers as well as the Jeremy Hass papers, which includes valuable correspondence, research and planning materials related to the institutional history of SBTHP and the development of the Presidio project. Hannah and Marsh collaborated on completion of the two-year project to rehouse and reorganize SBTHP's photograph collection.



Sketch of property parcels and location of Presidio Northwest Corner, c. 1976. Jeremy Hass collection.





Spectators at the Asian American Neighborhood Festival enjoying the Lion Dancers. Photo by Myriah Nina Photography.



Living History Docent Elvira Tafoya teaches students how to write with a quill and ink at the Presidio Classroom station of Early California Days. Photo by Roger Knox.

## Education

Melissa Chatfield, Ph.D.

In 2015, the Education Department was pleased to continue offering free and paid public programs that encourage people of all ages to engage with the history of Santa Barbara in unique ways. Through a grant from the California State Parks Foundation, we offered transportation stipends to 700 third grade students selected by lottery to participate in Early California Days. During the summer, our Cultural Arts and Summer Adventures Camp, in partnership with the Housing Authority, continued to thrive. Our Founding Day Festival brought people together to celebrate the rich cultural history of the Presidio Neighborhood. Later in the year, we continued our *Dia de los Muertos* Kids Craft Day, including Presidio Family Altars, and our sixth year of the Asian American Neighborhood Festival, featuring the musical group, Latin Filipino Connection. Rounding out the year, we hosted *Una Noche de las Posadas*, ending in a traditional Christmas party at Casa de la Guerra.

In addition to our signature youth and family events, we offered adult educational opportunities. The summer of 2015 saw the reintroduction of our Archaeology Field School, with college course credit through UCSB Extension. A more traditional educational experience was available through various lectures: Charles Johnson, Dr. James Brooks, Michael Hardwick, Dr. Iker Arranz and Chef Aingeru Etxebarria, Dr. Barbara Voss, and Dr. Marie Duggan. In addition to lectures, we hosted public screenings of three films as part of our Asian American Film Series: *Harana*, *9man*, and *Jake Shimabukuro*: *Life on Four Strings*.

# Visitor Services & Rentals

Sue Udden

2015 has brought great changes to the Visitor Services. Gift Shop Manager Marguerite Williams joined us in July this year. Staff have been working diligently to make the Administrative Offices a more organized and highly efficient working environment

Weekend Supervisor David Martinez helped to put together SBTHP's Veterans Day Ceremony. We have an enthusiastic team of Weekend Interpreters. The Weekend Interpreters have done an excellent job in greeting visitors and helping with their support during our many public and private events over the course of the year. This season, there have been quite a lot of cruise ships visiting Santa Barbara. Casa de la Guerra and the Presidio were open for cruise ship visitors.

Facilities rentals had a slow start this year. However, by late spring we found ourselves trying to accommodate last minute bookings. It turned out to be a very busy summer and fall. One of the most exciting features of our weddings at the Presidio was the presence of the *Soldados* at some of the weddings. Guests and visitors had a wonderful experience watching the firing of the cannon. We hosted a total of twenty-four weddings, eight wedding receptions, and fifteen co-sponsored/nonprofit events. In addition we had four corporate events for a total of fifty-one events. Facilities rental coordinator, Renee Longo is already busy booking for the 2016 season.



A corporate event in the courtyard of Casa de la Guerra. Photo by Renee Jackman Longo.



Soldados stand at attention at a wedding at the Presidio Chapel. Photo by Renee Jackman Longo.

Casa Campers on a visit to the Mills. Photo by Wayne Sherman.



Anacapa School students picking olives at the Mills, October, 2015. Photo by Michael H. Imwalle.

## Santa Inés Mission Mills

Wayne Sherman

While the Santa Barbara Trust for Historic Preservation continues to work with State Parks to complete the necessary requirements to make our site an official California State Park, there seems to be an increase in local awareness of our task. Over the years there has been a steady increase in local visitors to the site. In fact the most common phrase overheard is, "I lived here x-many years and I never knew this was here." Now I see many familiar faces returning with friends and family to enjoy the beauty of the site while telling of its important connection to the California historical narrative. All express gratitude and excitement at SBTHP's foresight to preserve the land around the Mills and the prospect of a future park to enjoy. It truly makes all the hard work that goes into maintaining the site worth it to see people getting such enjoyment from our efforts.

And while we are on the topic of enjoyment from effort, despite the continuing drought, we have again produced a very high quality olive oil from our trees. This year's vintage results from a blend of volunteer and professional help with a heaping dose of community. Try it—you will like it and be supporting a great local asset at the same time.

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### 2015 Donor Registry

With gratitude for your enduring support of the Santa Barbara Trust for Historic Preservation and its mission, it is a pleasure to present the 2015 edition of our Donor Registry.

As a 501(c)(3) nonprofit organization the Santa Barbara Trust for Historic Preservation counts on the support of our members and friends; your partnership makes it possible for us to do remarkable things. Individuals and organizations named below made gifts valued at \$100 or more during 2015. Every effort has been made to ensure the accuracy of our donor listing. Please excuse any errors that may appear. To all our contributors we offer our deep appreciation for your support.

#### 4 X 4 X 4 CAMPAIGN

Mr. and Mrs. Roger Aceves Mr. Tim Aceves Mr and Mrs John Paul Beltran Mr. and Mrs. Reid Cederlof Terease Chin and Ken Yamamoto Diane Dodds-Reichert and David Reichert Lois S. Erburu Sally Fouhse and Dan Kronstadt George Griffiths and Olive Griffiths Charitable Foundation Mr. and Mrs. Michael Gifford Dr. and Mrs. Robert L. Hoover Mr. and Mrs. James Kahan Janet, Lester, and Lyndie Knispel Mr. Kevin Marvin Montecito Bank & Trust Holly Murphy Dr. and Mrs. Arthur Najera Mr. and Mrs. Kevin Nimmons Mr. and Mrs. John S. Poucher Mr. David Pratt Mrs. Virginia Ridder Mr. and Mrs. Richard Rojas San Pasqual Trust Mr. and Mrs. Donald G. Sharpe Mr. and Mrs. Kevin Snow Mr. Luke Swetland

Mr and Mrs Bob Tuler

#### ALHECAMA THEATRE RESTORATION

California Community Foundation Ehlen Spiess & Haight Mosher Foundation Santa Barbara Foundation

#### **BUY-A-BRICK CAMPAIGN FOR** THE PRESIDIO NORTHWEST CORNER

Ayala, Calderon, Celaya, DeMarco, Grand, Goena, Hardy, Janssens, Martinez, Pico, Potts, Prescott, and Sangster

> In memory of Felipe Santiago de la Cruz Pico

Ms. Jacqui Cacan

In honor of the Architectural Foundation of Santa Barbara

Mr. and Mrs. Reid Cederlof In memory of Joan Stewart

Cina Hodges

In memory of Joan Stewart

Marcie Ide

In honor of Rov Gaskin Dr. and Mrs. Jarrell C. Jackman In honor of Dr. Robert Hoover. Dr. James Mills, Mike Imwalle, Sally Fouhse. Eduardo Garcia. Christa Clark Jones. and Sophia Rubenstein

Dr. and Mrs. Jarrell C. Jackman In memory of Joan Stewart Mr. and Mrs. Josiah C. Jenkins W Kurt Kuker In memory of Joan Stewart Jean Martin In memory of Joan Stewart Mr. Keith J. Mautino In memory of Norma Jean

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El Presidio de Santa Bárbara State Historic Park

Dr. and Mrs. Arthur Najera Omega Financial Group Mr. and Mrs. John S. Poucher Lisa Reich and Bob Johnson Mr. and Mrs. Richard Roias Mr. and Mrs. Steven Rosso Santa Barbara County Courthouse Mr. and Mrs. Donald G. Sharpe Mr. and Mrs. Kevin Snow Mr. and Mrs. Bob Tuler Jo Beth Van Gelderen Mr. and Mrs. Richard Welch Mr. and Mrs. James Westby Gary Yoshimura and Sandra Chan Zaytoon

#### **CASA CANTINA**

Logic Monitor Pacific Beverage

#### CASA DE LA GUERRA **OPERATIONS**

Ms. Pamela F. de Villaine

#### COTA-KNOX

Ms. Mary Louise Days In memory of Hank Arellanes, Janice Cota Chase. Glady Robles Diaz. Peter W. Ehlen. Garvan Kuskey, Vivian Obern. and Mike Perry

#### **EDUCATION AND OUTREACH**

California State Parks Foundation George Griffiths and Olive Griffiths Charitable Foundation Henry W. Bull Foundation Perry Mazda of Santa Barbara The Towbes Foundation

#### **EL PRESIDIO SHP SIGNAGE**

M. Kay Van Horn

#### FOUNDING DAY FESTIVAL

Santa Barbara County Arts Commission

#### **GENERAL OPERATIONS**

Mr. and Mrs. Timothy Aguilar

Argonaut Charitable Foundation Mr. Richard Barbar *In memory of Mike Perry* Mrs. Judy Beraldo In memory of Mike Perry Mrs. Stephen R. Boyle In memory of Stephen R. Boyle Mr. and Mrs. John Branquinho California Community Foundation Ms. Catherine Cavaletto Mr. and Mrs. Reid Cederlof In memory of Vivian Obern Mr. and Mrs. Albert Chan and Betty Ikeda In memory of Vivian Obern Ms. Helen Couclelis In memory of Vivian Obern Daughters of Union Veterans of the Civil War, Tent 22 In memory of Vivian Obern Mr. and Mrs. Patrick DeYoung Mr. and Mrs. Jay Di Silvestri In memory of Garvan F. Kuskey Mr. and Mrs. James Donahue Mr. James N. Favor Ms. Nancy H. Fee In honor of Elizabeth C. Fee and Mary Jane Brinton Mrs. Alma Gray In memory of Garvan F. Kuskey Randall and Jana Waring Green Mr. and Mrs. Thomas M. Gunder Dr. and Mrs. Robert L. Hoover Dr. and Mrs. Jarrell C. Jackman Mr. and Mrs. Michael Jacoby John and Beverly Stauffer Foundation Mr. and Mrs. James Kenney In memory of Garvan F. Kuskey Ms. Jill Dore Kent La Boheme Dance Group In memory of Garvan F. Kuskey Gretchen Lauppe Jones Sheila Lodge Mr. and Mrs. Leroy Lugo In memory of Richard Lugo MacFarlane, Faletti & CO. LLP Mr. and Mrs. Craig A. Makela

Mr. and Mrs. Frank McGinity

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#### PRESIDIO CHAPEL TILE

Dr. and Mrs. Jarrell C. Jackman In honor of Sophia Rubenstein

#### PRESIDIO HERITAGE GARDEN

California Missions Foundation

#### PRESIDIO VISITOR CENTER

Outhwaite Foundation

#### REGINALD JOHNSON EXHIBIT

Mrs. Virginia Ridder

#### SANTA INÉS MISSION MILLS

California Missions Foundation Ms. Mary Louise Days In memory of Carol McCormick Dr. Richard E. Oglesby In memory of Jeremey D. Hass

Ella Isabel Paris In memory of Jeremey D. Hass

#### **TAMALE FEST**

Mr. and Mrs. James Westby

### **MEMBERSHIP**

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William and M. Kay Van Horn Dr. Charles Varni Mr. and Mrs. Edward W. Vernon Mr. and Mrs. James Westby Katy and Robert Zappala Mr. and Mrs. Ernest Zomalt



Leave a Legacy that's Historic Determining your personal legacy is a special part of estate planning. Your attorney can help you design an estate plan that that can benefit the people and places you love. If you would like to learn more about how your generosity today can save special places and preserve our local heritage for years to come please call (805) 965-0093. It's your turn to make history!

**Gift Membership** Giving a SBTHP membership to a friend or family member is an effective way to spread the word about historic preservation in Santa Barbara County. Recipients are notified of your gift with a welcome packet and as a member, they receive La Campana, our membership publication, and invitations to our events and activities. Gift memberships expand our ranks and include your loved ones in the effort to save special places for future generations to enjoy. Visit www.sbthp.org.

### Santa Barbara Trust for Historic Preservation Consolidated Statements of Financial Position June 30, 2015 and 2014

#### **ASSETS**

#### LIABILITIES AND NET ASSETS

| Current Accete   | 2015   | 2014   |  | 2014  | 2013  |
|--|--|--|--|---|---|
| Current Assets Cash and cash equivalents Accounts receivable Grants receivable Gift shop inventory Prepaid expenses Current portion of note receivable (Note 3)                                    | \$ 235,629<br>126,415<br>-<br>18,454<br>5,260<br>5,631                           | \$ 397,248<br>128,776<br>138,485<br>20,257<br>2,917<br>7,065                     | Liabilities Accounts payable Accrued expenses Deposits Margin loan (Note 6) Line of credit (Note 6)  | \$ 28,955<br>10,264<br>18,328   | \$ 27,249<br>9,181<br>17,228<br>222,291                                   |
| Total Current Assets   | 391,389  | 694,748  | Total Liabilities, all current   | 57,547  | 275,949   |
| Property and Equipment Land Buildings and improvements Equipment Artifacts and collections Less accumulated depreciation Net Property and Equipment  | 1,991,735<br>823,676<br>187,758<br>40,962<br>3,044,131<br>(426,036)<br>2,618,095 | 1,991,735<br>823,676<br>168,860<br>39,720<br>3,023,991<br>(394,027)<br>2,629,964 | Net Assets     Unrestricted net assets     Board designated     Temporarily restricted net assets (Note 7)     Permanently restricted net assets (Note 7) Total Net Assets  Total Liabilities and Net Assets | 1,829,504<br>237,340<br>6,838,055<br>713,860<br>9,618,759<br>\$ 9,676,306 | 2,102,561<br>37,340<br>6,999,259<br>707,710<br>9,846,870<br>\$ 10,122,819 |
| Other Assets Cash value of life insurance Investments (Note 4) Note receivable, net of current portion (Note 3) Interests in charitable remainder trusts (Note 5) Total Other Assets  Total Assets | 20,793<br>6,327,595<br>238,091<br>80,343<br>6,666,822<br>\$ 9,676,306            | 6,471,843<br>245,611<br>80,653<br>6,798,107<br>\$ 10,122,819                     |  |   |   |

# Santa Barbara Trust for Historic Preservation Consolidated Statements of Activities For the Year Ended June 30, 2015 With Comparative Totals for the Year Ended June 30, 2014

|  |              | Unrestricted<br>Board | Temporarily  | Permanently | 2015         | 2014         |
|--|--------------|-----------------------|--------------|-------------|--------------|--------------|
|  | Unrestricted | Designated            | Restricted   | Restricted  | Total        | Total        |
| Revenue and Support:   | Offication   | Designated            | restricted   | Treatmoted  | TOTAL        | Total        |
| Contributions and grants   | \$ 17.924    | s -                   | \$ 289,153   | \$ 6,150    | \$ 313,227   | \$ 620,966   |
| Membership dues  | 27,825       |                       | -            |             | 27,825       | 25,468       |
| Rent   | 105,369      | -                     | -            |             | 105,369      | 177,276      |
| Special events, net of expenses<br>of \$95,139 and \$104,624, respectively | 10,018       | -                     |              |             | 10,018       | (16,591)     |
| Gift shop net gain/(loss)  | 2,417        | -                     | -            |             | 2,417        | (984)        |
| Interest and dividends, net  | 134,767      | -                     | 29,256       |             | 164,023      | 136,566      |
| Unrealized (loss)/gain on investments                                      | (340,373)    | -                     | (42,198)     |             | (382,571)    | 459,912      |
| Change in charitable remainder trust                                       | -            | -                     | (310)        | -           | (310)        | (12,459)     |
| Realized gain on sale of investments                                       | 338,946      | -                     | 24,887       |             | 363,833      | 414,674      |
| Loss on sale of real property  | -            | -                     | -            |             | -            | (555,853)    |
| Interest on loan receivable  | 15,592       | -                     | -            |             | 15,592       | 15,593       |
| Other income   | 12,364       | -                     | -            | -           | 12,364       | 49,715       |
| Reimbursement of state park payroll costs                                  | 498,522      |                       |              |             | 498,522      | 395,203      |
| Total Revenue and Support  | 823,371      |                       | 300,788      | 6,150       | 1,130,309    | 1,709,486    |
| Net assets released from restrictions                                      | 461,992      | -                     | (461,992)    | -           | -            | -            |
| Expenses   |              |                       |              |             |              |              |
| Archaeology and restoration  | 311,049      | -                     | -            |             | 311,049      | 352,437      |
| Curatorial and education   | 82,063       | -                     | -            |             | 82,063       | 103,124      |
| Research   | 28,338       | -                     | -            |             | 28,338       | 35,172       |
| Rental expenses  | 12,317       | -                     | -            |             | 12,317       | 34,374       |
| Development and marketing  | 72,887       | -                     | -            | -           | 72,887       | 59,203       |
| State park payroll costs   | 498,522      | -                     | -            | -           | 498,522      | 395,203      |
| General and administrative   | 352,695      | -                     | -            | -           | 352,695      | 434,984      |
| Interest   | 549          |                       |              |             | 549          | 23,522       |
| Total Expenses   | 1,358,420    |                       |              |             | 1,358,420    | 1,438,019    |
| Change in Net Assets   | (73,057)     | -                     | (161,204)    | 6,150       | (228,111)    | 271,467      |
| Transfer   | (200,000)    | 200,000               | -            |             | -            |              |
| Net Assets at Beginning of Year  | 2,102,561    | 37,340                | 6,999,259    | 707,710     | 9,846,870    | 9,575,403    |
| Net Assets at End of Year  | \$ 1,829,504 | \$ 237,340            | \$ 6,838,055 | \$ 713,860  | \$ 9,618,759 | \$ 9,846,870 |

### Santa Barbara Trust for Historic Preservation Consolidated Statements of Cash Flows For the Years Ended June 30, 2015 and 2014

|   | 2015         | 2014        |
|---|--------------|-------------|
| Cash Flows from Operating Activities:   |              |             |
| Change in net assets Adjustments to reconcile change in net assets to net cash (used)/provided by operating activities: | \$ (228,111) | \$ 271,467  |
| Depreciation  | 32,009       | 57.080      |
| Gain on sale of investments   | (363,833)    | (414,674)   |
| Loss on sale of real property   |              | 555,853     |
| Unrealized loss/(gain) on investments   | 382,571      | (459,912)   |
| Change in interests in charitable remainder trusts  | 310          | 12,459      |
| Permanently restricted cash contributions for endowment   | 6,150        | 350         |
| Changes in:   |              |             |
| Accounts receivable   | 2,361        | (44,942)    |
| Notes receivable  | 8,954        | 5,758       |
| Pledges receivable  | -            | 1,288       |
| Grants receivable   | 138,485      | (138,485)   |
| Gift shop inventory   | 1,803        | (596)       |
| Prepaid expenses  | (2,343)      | (334)       |
| Cash value of life insurance  | (20,793)     | -           |
| Accounts payable  | 1,706        | (5,465)     |
| Accrued expenses  | 1,083        | (635)       |
| Deposits  | 1,100        | (3,750)     |
| Net Cash Used by Operating Activities   | (38,548)     | (164,538)   |
| Cash Flows from Investing Activities:   |              |             |
| Purchase of fixed assets  | (20,140)     | (39.937)    |
| Proceeds from sale of property, net   | ,,           | ,,,         |
| of selling expenses of \$0 and \$53,228, respectively   |              | 2,281,772   |
| Proceeds from sale of investments   | 2,994,062    | 3,378,532   |
| Purchase of investments   | (2,868,552)  | (3,543,026) |
| Net Cash Provided By Investing Activities   | 105,370      | 2,077,341   |
| Cash Flows from Financing Activities:   |              |             |
| Draw on loan  |              | 222,291     |
| Repayment on loan   | (222,291)    | (1,243,829) |
| Permanently restricted contributions for endowment  | (6,150)      | (350)       |
| Repayment on line of credit   |              | (699,500)   |
| Net Cash Used By Investing Activities   | (228,441)    | (1,721,388) |
| Net (Decrease)/Increase in Cash and Cash Equivalents  | (161,619)    | 191,415     |
| Beginning Cash and Cash Equivalents   | 397,248      | 205,833     |
| Ending Cash and Cash Equivalents  | \$ 235,629   | \$ 397,248  |
|   |              |             |





### Santa Barbara Trust for Historic Preservation

El Presidio de Santa Bárbara SHP • Casa de la Guerra Santa Inés Mission Mills + Jinuny's Oriental Gardens

2015

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#### **GEORGE AND VIVIAN OBERN PRESERVATION** STEWARDSHIP AWARDEES

2002 - Santa Barbara Foundation

2003 - Palmer G. Jackson

2003 - Nancy Luton Jackson

2004 - Alan Eliot

2006 - Santa Ynez Valley High School Environmental and Spatial Technologies Class

2006 - Casa del Herrero Foundation

2007 - Goleta Valley Historical Society

2007 - Derek Westen

2008 - The Jimmy Chung Family 2009 - Channel Coast Corporation

2010 - Santa Barbara Contractors Association and Built Green Santa Barbara

2011 - City of Solvang

2012 - La Huerta Project

2013 - Historic Resources Element Task Force. City of Santa Barbara

2014 - Santa Barbara Courthouse Legacy Foundation

2015 - Santa Barbara Maritime Museum

#### **PEARL CHASE** HISTORIC PRESERVATION AND CONSERVATION

1989 - \*Irene Suski Fendon

1990 - \*Robert O. Easton 1991 - Mary Louise Days

1992 - \*Jean Storke Menzies

1993 - \*Ray Strong

1994 - \*Joyce Parkinson

1995 - James G. Mills, Pharm.D.

1996 - \*David Gebhard

1997 – Sue Higman

1998 - (\*George) and Vivian Obern

1999 - Flizabeth Erro Hyolboll

2000 - \*Jeremy Hass

2001 - Helen Schott Pedotti

2002 - David H. Anderson

2003 - City of Santa Barbara Redevelopment Agency

2004 - Louise Boucher

2006 - \*Maria Herold

2008 - Milford Wayne Donaldson

2009 - Glenn Price

2010 - Kellam de Forest

2011 – Francisco González

2012 - Kathi Brewster

2013 - Old Mission Santa Inés

2014 - Timothy Aquilar

2015 - Donald G. Sharpe

#### **SUE HIGMAN VOLUNTEER** OF THE YEAR AWARD

2010 - Anthony Spann and the Staff of Harrison Design Associates

2011 - Kathy Chalfant

2012 - Terease Chin

2013 - Katherine Lowe 2014 - Jeannie Davis

2015 - "Buffalo" Joe Schomer

#### **SUE HIGMAN INTERNSHIP**

2011 - Tacy Kennedy Santa Inés Mission Mills **GIS Survey** 

2012 - Michael Orth, Stephanie Byrd SBTHP 50th Anniversary Project

2013 – Emelie Engstrom SBTHP 50th Anniversary Project

2014 - Mika Thornburg **Exhibits and Collections** 

2015 – Madison Lowery and Dana Hughes **Education Programs** 

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The Santa Inés Mission Mills Olive Oil comes from trees planted at the Santa Inés Mission Mills State Property. It is locally cold-pressed from a blend of Manzanillo, Mission, Arbequina, Lucca, and Grappolo varieties of olives. The Santa Inés Mission Mills complex includes water-powered fulling and grist mills, exceptional examples of Spanish efforts to industrialize the mission agriculture and economy. Part of the Mission Santa Inés National Historic Landmark District that includes the Santa Inés Mission and 95 acres of surrounding land, the mills complex is under the stewardship of the Santa Barbara Trust for Historic Preservation. SBTHP works in partnership with California State Parks, the Santa Inés Mission, and the City of Solvang to ensure that the natural and cultural resources that make this a special place are protected and preserved for future generations.

#### SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

El Presidio de Santa Bárbara State Historic Park • Casa de la Guerra Santa Inés Mission Mills • Jimmy's Oriental Gardens 123 EAST CANON PERDIDO STREET, SANTA BARBARA, CA 93101 (805) 965-0093 • FAX (805) 568-1999 • WWW.SBTHP.ORG