

## A WORD FROM SBTHP

#### Dear SBTHP Members,

We have enjoyed seeing you at events and programs at El Presidio de Santa Bárbara State Historic Park, Casa de la Guerra and the Santa Inés Mission Mills this year, and we are grateful for your ongoing support of our work to preserve and share Santa Barbara's historic places. We've been delighted at the turnout at the new membership enhancements during our beloved programs like the Asian American Neighborhood Festival and Una Noche de Las Posadas this year, and we are planning several more ways to welcome and celebrate your membership in the upcoming year.

Inside this report, we have compiled the highlights of 2023, including a new atmospheric experience for visitors to El Presidio SHP, critical maintenance work on our historic buildings, a new series of free weekend family activities and programs, and successful events including our inaugural Golf Tournament fundraiser. We also present our audited financials for fiscal year 2022-2023 and our donor registry.

Thank you again for all your contributions and support of SBTHP. We look forward to seeing you in the year ahead!

**Executive Director** 

Anne Reteism

**Board President** 

The Santa Barbara Trust for Historic Preservation stewards the past and present of the Presidio Neighborhood and inspires preservation advocacy throughout the County in order to create a more vibrant community.

## BOARD OF DIRECTORS & STAFF

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Accountant

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Visitor Experience Assistant











## BY THE NUMBERS: PEOPLE SERVED

1,330

7,642

33,246

15,989

School program attendees

Public Program participants

Event rental clients, guests, and markets

Visited El Presidio SHP and Casa de la Guerra

## DONOR REGISTRY

**ADVOCATES // MEMBERSHIP** 

Michael Alvarado

Miroslava Chavez-Garcia

Janet Colby\*\*

Dr. Mary Blackwood Collier

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**ANNUAL FUND** 

Mr. and Mrs. Roger Aceves
Appleton Partners LLP

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Shelley and Mark Bookspan

Mrs. Kathleen Brewster

In memory of Mary Triplett Ayers

Dr. and Mrs. W. E. Brownlee

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California Office of the Small Business Advocate

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Darlene Craviotto and Philip Levien

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In memory of Mary Elizabeth Days Alvarado,

Mary Triplett Ayers, & Lady Georgina Petty-

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Steven Rickborn

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In honor of Ms. Mary Louise Days

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Santa Barbara Tasting Tours\*\*

The Schell Family Charitable Fund

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Dr. and Mrs. Alexander Tang

**ASIAN AMERICAN PROGRAMMING** 

California Department of Social Services\*\* George H. and Olive J. Griffiths Foundation

CASA CANTINA

Mr. and Mrs. Roger Aceves

John and Tracie Doordan

Firestone Walker Brewing Company Impulse Advanced Communications

Pacific Beverage

CASA DE LA GUERRA AUDIO PROJECT

Mr. and Mrs. Roger Aceves Peter and Becky Adams

## DONOR REGISTRY

Michael Alvarado

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*In memory of Mary Triplett Ayers* 

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Mr. and Mrs. Michael H. Imwalle

Mr. and Mrs. Josiah C. Jenkins

Carrie Kelly

Ms. Lynn P. Kirst

Ellen Robinson

Mr. and Mrs. Bob Tuler

**Ernest and Leslie Zomalt** 

#### **COTA-KNOX HOUSE RESTORATION**

The Colonial Dames of America Chapter XXXVIII

Santa Barbara

Ms. Mary Louise Days

The Walter J. & Holly O. Thomson Foundation

#### **EDUCATION & OUTREACH**

Montecito Bank & Trust

June G. Outhwaite Charitable Trust

Patricia Nettleship\*\*

Santa Barbara/Puerto Vallarta Sister City

Committee\*\*

Sidney Stern Memorial Trust

The Ivano P. Vit Trust

#### **INAUGURAL GOLF TOURNAMENT**

Mr. and Mrs. Roger Aceves

Arnold Brothers Construction, Inc.

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Mike Bergquist\*\*

Gregory Blix\*\*

Cambron Roofing\*\*

Bunnin Chevrolet\*\*

Chris Carty\*\*

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Three Pickles Deli and The Pickle Room

Village Properties

Valerie Yoshimura\*\*

Ernest and Leslie Zomalt

#### KING CARLOS STATUE REINTREPRETATION

The James S. Bower Foundation

California Humanities

#### **LA CAMPANA**

John and Beverly Stauffer Foundation

#### POP! // JUNE 3, 2023

Mr. and Mrs. Roger Aceves

**Arlington Financial Advisors LLC** 

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Shelley and Mark Bookspan

Terease Chin and Ken Yamamoto

Thomas Craveiro\*\*

Ms. Mary Louise Days

John and Tracie Doordan

Dr. and Mrs. Gerry and Aimee Doran

Meridian Group

Salvador Güereña

Jessica Haro

Mr. and Mrs. Michael H. Imwalle

Joseph Jester

Nina Johnson

Dr. Hugo Loaiciga

Elayna Maquinales\*\*

Meridian Group

Montecito Bank & Trust

Mr. Michael Neal Arnold, MAI, MRICS

Omega Financial Group

Anne Petersen, Ph.D.

Ms. Pat Saley

Mr. and Mrs. Thomas H. Sanborn

Heather Schuyler

## DONOR REGISTRY

### **POP! // JUNE 3, 2023 (CONTINUED)**

Dale and Judy Seborg Kyle Slattery Qing Xue\*\* Ernest and Leslie Zomalt

### **SANTA INÉS MISSION MILLS**

Suzanne Riley

\*\*Indicates first time donor

Businesses, individuals, and organizations listed on the previous three pages made gifts of \$100 or more during 2023. If you find any errors, please contact our Development Office at (805) 961-5378.

## AWARD WINNERS

## PEARL CHASE HISTORIC PRESERVATION & CONSERVATION AWARD

## GEORGE & VIVIAN OBERN PRESERVATION STEWARDSHIP AWARD

1989 \*Irene Suski Fendon1990 \*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 Higman1998 \*George and Vivian Obern

1999 \*Elizabeth Erro Hvolboll

2000 \*Jeremy D. 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 Gonzalez

2012 Kathi Brewster

2013 Old Mission Santa Inés

2014 \*Timothy Aguilar

2015 Donald G. Sharpe

2018 Hutton Parker Foundation

2019 Judith Dodge Orias

2022 \*M. Kay Van Horn

2023 \*Elvira Tafoya

2002 Santa Barbara Foundation

2003 Palmer Jackson

2003 Nancy Luton Jackson

2004 Alan Eliot

2006 Santa Ynez Valley High School

Environmental & 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

2016 Katie and David Hay

2017 Santa Barbara Conservancy

2019 \*Robert Harry Lovejoy

2022 City of Santa Barbara

Department of Parks & Recreation for the restoration of the Cabrillo

Pavilion

2023 Main-Begg Farmhouse

## SUE HIGMAN VOLUNTEER OF THE YEAR AWARD

2010 Anthony Spann and the Staff of Harrison Design Associates

2011 Kathy Chalfant

2012 Terease Chin2013 Katherine Lowe

2014 Jeannie Davis

2015 \*"Buffalo" Joe Schomer

2016 David Bolton

2017 Suzi Calderon Bellman

2018 Terease Chin

2019 Kyle Slattery

2020 Valerie Roses

2022 Pam Iuliano

2023 Dr. Paul Mori

## AWARD WINNERS

#### PARTNERSHIP AWARD

#### PRESIDENT'S AWARD

2019 Folk Orchestra of Santa Barbara2022 Mujeres Makers Market

2022 Cody A. Makela2023 Salvador Güereña

## LIFE HONORARY DIRECTORS

\*Amelia Acres Kathi Brewster Dr. W. E. Brownlee \*Norman Caldwell Terease Chin Mary Louise Days \*Julia Forbes \*Roy Gaskin Michael R. Hardwick Barbara Harris

\*Jeremy Hass
\*Sue Higman
Roger Horton
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\*Jean Storke Menzies
\*James G. Mills, Pharm.D.
\*Vivian Obern
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\*Alice Rypins
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Edward A. Williams II

## FINANCIAL STATEMENTS

## SANTA BARBARA TRUST FOR HISTORIC PRESERVATION (A NON-PROFIT CORPORATION) STATEMENT OF FINANCIAL POSITION JUNE 30, 2023

With Comparative Totals for the Year Ended June 30, 2022

#### **ASSETS**

	Without Donor Restrictions	With Donor Restrictions	Total June 30, 2023	Total June 30, 2022	
Current Assets					
Cash and cash equivalents	\$ 853,022	\$ 398,243	\$ 1,251,265	\$ 1,450,083	
Cash held with fiscal agent	45,128	-	45,128	55,570	
Accounts and grants receivable	1,000	6,000	7,000	1,000	
Gift shop and fundraising inventory	22,869		22,869	26,841	
Total Current Assets	922,019	404,243	1,326,262	1,533,494	
Property and Equipment					
Land	1,906,735		1,906,735	1,906,735	
Buildings and improvements	568,676		568,676	568,676	
Equipment	238,932	-	238,932	228,801	
Artifacts and collections	44,161		44,161	44,161	
	2,758,504	-	2,758,504	2,748,373	
Less accumulated depreciation					
and amortization	(535,988)	-	(535,988)	(530,651)	
Net Property and Equipment	2,222,516		2,222,516	2,217,722	
Other Assets					
Investments (see Notes 3, 11 and 12)	1,479,818	7,107,589	8,587,407	8,164,994	
Cash value of life insurance	25,990		25,990	26,993	
Interests in charitable trusts (see Note 4)	245,151		245,151	231,960	
Total Other Assets	1,750,959	7,107,589	8,858,548	8,423,947	
Total Assets	\$ 4,895,494	\$ 7,511,832	\$ 12,407,326	\$ 12,175,163	

# SANTA BARBARA TRUST FOR HISTORIC PRESERVATION (A NON-PROFIT CORPORATION) STATEMENT OF FINANCIAL POSITION JUNE 30, 2023

## With Comparative Totals for the Year Ended June 30, 2022

#### LIABILITIES AND NET ASSETS

	Without Donor Restrictions		R	With Donor Restrictions		Total June 30, 2023		Total June 30, 2022	
Current Liabilities									
Accounts payable	\$	17,795	\$		\$	17,795	\$	8,976	
Accrued payroll and vacation pay		84,713				84,713		75,579	
Accrued interest		-				-		5,500	
Event deposits and advance facility rentals		82,825				82,825		66,445	
Tenant deposits		63,548				63,548		45,950	
Rents received in advance		12,628				12,628		23,070	
		12,020		-		12,020			
Current portion of long term debt		-						1,107	
Total Liabilities, all Current		261,509	-			261,509		226,627	
DEBT								98,893	
Net Assets									
Without donor restrictions		2,894,527				2,894,527		3,213,039	
Without donor restrictions:		2,004,027				2,00 .,02.		0,2.0,000	
board designated (see Note 6)		1,739,458				1,739,458		1,417,731	
,		1,739,430		7 544 022		7,511,832		7,218,873	
With donor restrictions (see Note 6)		1 000 005		7,511,832					
Total Net Assets		4,633,985		7,511,832		12,145,817		11,849,643	
Total Liabilities and Net Assets	\$	4,895,494	\$	7,511,832	\$	12,407,326		12,175,163	

## SANTA BARBARA TRUST FOR HISTORICAL PRESERVATION (A NON-PROFIT CORPORATION) STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS JUNE 30, 2023

### With Comparative Totals for the Year Ended June 30, 2022

	Without Donor estrictions	With Donor Restrictions		Total June 30, 2023		Total June 30, 2022	
Revenue, Gains and Other Support							
Contributions and grants	\$ 42,076	\$	68,500	\$	110,576	\$	210,506
Membership dues	11,995		-		11,995		15,100
Special events (net of expense of \$78,104 and \$7,317, respectively)	62,288		-		62,288		16,629
Rental income-commercial properties	1,159,368		-		1,159,368		1,162,468
Facility rental income	158,575		-		158,575		121,177
Gift shop and other income	25,050				25,050		18,728
Program income	31,065		-		31,065		22,671
Change in value of charitable trusts	13,191				13,191		(26,812)
Interest on loans receivable and checking Investment income:	7,918		-		7,918		1,303
Interest and dividends	46,383		190,147		236,530		239,159
Investment expenses	(10,910)		(54,921)		(65,831)		(74,774)
Realized gains	(23,830)		(138,806)		(162,636)		384,578
Unrealized gains (losses)	140,787		636,347		777,134		(1,523,910)
Net investment income	152,430		632,767		785,197		(974,947)
Net assets released from restrictions	408,308		(408,308)				
Total Revenue, Gains and Other Support	 2,072,264		292,959		2,365,223		566,823
Expenses							
Program	1,753,370				1,753,370		1,463,268
Management and general	235,433		-		235,433		146,432
Fundraising	80,246		-		80,246		76,993
Total Expenses	2,069,049		-		2,069,049		1,686,693
Increase (decrease) in Net Assets	3,215		292,959		296,174		(1,119,870)
Net Assets at Beginning of Year	4,630,770		7,218,873		11,849,643		12,969,513
Net Assets at End of Year	\$ 4,633,985	\$	7,511,832	\$	12,145,817	\$	11,849,643

# SANTA BARBARA TRUST FOR HISTORIC PRESERVATION (A NON-PROFIT CORPORATION) STATEMENT OF CASH FLOWS FOR THE YEAR ENDED JUNE 30, 2023

### With Comparative Totals for the Year Ended June 30, 2022

	Jun	Total e 30, 2023	Total June 30, 2022		
Cash Flows from Operating Activities					
Increase (decrease) in net assets	\$	296,174	(1,119,870)		
Adjustments to reconcile increase (decrease) in net assets					
to cash used by operating activities:					
Depreciation		18,500	22,895		
Unrealized gain on investments		(777, 134)	1,523,910		
Realized gain on investments		162,636	(384,578)		
Change in operating assets and liabilities:					
Accounts receivable		(6,000)	2,082		
Gift shop inventory		3,972	(2,380)		
Cash surrender value		1,003	(1,181)		
Interests in charitable trusts		(13,191)	26,813		
Accounts payable		8,819	(41,549)		
Accrued expenses		3,634	16,442		
Event deposits		16,380	52,805		
Tenant deposits and rents received in advance		7,156	6,529		
Net Cash (Used by) Provided by Operating Activities	_	(278,051)	101,918		
Cash Flows from Investing Activities					
Proceeds from sale of investments		2,178,077	1,612,444		
Purchases of investments		(1,985,991)	(1,454,770)		
Purchase of fixed assets		(23,295)	.,,		
Net Cash Provided by Investing Activities		168,791	157,674		
Cash Flows from Financing Activitites		(400.000)			
Payment against debt obligation		(100,000)			
Net Cash Used by Financing Activities		(100,000)			
Net (Decrease) Increase in Cash and Cash Equivalents		(209,260)	259,592		
Cash and Cash Equivalents at Beginning of Year		1,505,653	1,246,061		
Cash and Cash Equivalents at End of Year	\$	1,296,393	\$ 1,505,653		

## UPCOMING EVENTS

PRESIDIO BY CANDLELIGHT • February 1, 2024

**ILLUMINATING BLACK CALIFORNIA: STORIES FROM THE JIM CROW ERA (LECTURE)** • February 8, 2024

YEAR OF THE DRAGON FESTIVAL • February 10, 2024

FAMILY DAYS AT EL PRESIDIO SHP • February 25, June 23, September 15, October 20, 2024

**SBTHP 2ND ANNUAL GOLF TOURNAMENT** • April 19, 2024

WOMEN AND THE MEXICAN REVOLUTION (BOOK TALK) • April 24, 2024

**COMMUNITY HISTORY DAY** • April 28, 2024

POP! (PRESIDIO ORCHARD PARTY) • June 1, 2024

15TH ANNUAL ASIAN AMERICAN FILM SERIES • July 5, 12, 19, 26, 2024

CASA CANTINA AT CASA DE LA GUERRA • August 1 - 3, 2024

**ASIAN AMERICAN NEIGHBORHOOD FESTIVAL** • October 13, 2024

DÍA DE LOS MUERTOS & MUJERES MAKERS MARKET • November 3, 2024

**UNA NOCHE DE LAS POSADAS** • December 13, 2024

**IMAGE CREDITS:** Front cover // students learn the history of Jimmy's Oriental Gardens by Solange Aguilar; Page 3 // (left) completed Moullet House roof and widow's walk by Tim Aceves, (right) roof repair underway at Jimmy's Oriental Gardens by Michael H. Imwalle; Page 4 // projection test of the Historical Wedding Experience by Kevin McGarry; Page 5 // SBTHP staff with oral history contributors by Celina García; Page 6 // (left) kids participate in staff-led activities at Día de los Muertos Craft Day by Celina García, students participate in Our Communities, Our Stories by Solange Aguilar; Page 7 // (left) golf carts lined up at the Inaugural Golf Tournament by Tim Aceves, (right) Val-Mar Records performs at Casa Cantina by Tim Aceves; Back cover // SBTHP member's gathering for music and wine in the Orchard prior to Una Noche de Las Posadas by Tim Aceves.

