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!

Anne Peterson
Executive Director

Michael Walsh
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

Michael Neal Arnold  
President

Cody A. Makela  
First Vice President

Debby Aceves  
Second Vice President

James Krautmann  
Secretary

Kyle Slattery  
Treasurer

Anthony Grumbine  
Immediate Past President

Board Members
Shelley Bookspan
John Doordan
Jared Ficker
Salvador Güereña
Jeff Haight
Joe Handerhan
Jessica Haro
Nina Johnson
Mia Lopez
Lena Morán-Acereto
Kevin Nimmons
Andrea Steward
Kai Tepper
Tara Wood
Leslie Zomalt

Anne Petersen, Ph.D.  
Executive Director

Tim Aceves  
Associate Director for Advancement

Dez Alaniz  
Director of Presidio Research Center

Diane Black  
Visitor Experience Assistant

Eileen Daley  
Office Manager

Michael DeMetre  
Visitor Experience Assistant

Sarah Fenenga  
Director of Programs

Celina Garcia  
Programs & Marketing Coordinator

Claire Giroux  
Event Attendant

Iran Gonzalez  
Maintenance & Security Supervisor

Nicole Haggstrom  
Visitor Experience Assistant

Jordan Hitchens  
Director of Membership & Event Rentals

Leeann Haslouer & Tom Walton  
Santa Inés Mission Mills State Historic Park  
Agricultural & Maintenance Supervisors

Michael H. Imwalle  
Associate Executive Director of Cultural Resources

Melanie Magolan  
Director of Visitor Experience

Kevin McGarry  
Associate Director for Public Engagement

Joshua Richardson  
Event Attendant

Cay Sanchez  
Accountant

Isaac Speer  
Visitor Experience Assistant
In 2023, we made significant repairs to the roof at Jimmy’s Oriental Gardens (1947) and replaced the roof at the Moullet House (1896); both historic resources in El Presidio SHP. As part of the project, we reconstructed the delicate widow’s walk that tops the Moullet House.
We recently launched an important new element for visitors at El Presidio de Santa Bárbara State Historic Park, the Historical Wedding Experience. Guided by SBTHP’s Visitor Experience Plan, and significant planning, research, and technical achievements by a team of expert consultants and staff, the new experience in the Presidio Chapel will be available for school tours and the visiting public alike. The experience recreates an early wedding of Presidio residents using digital projection and audio effects.
The Presidio Research Center launched a Santa Barbara Filipino Community Oral History Project in 2023 with support from a City of Santa Barbara Community Arts Grant administered by the Santa Barbara County Office of Arts and Culture. The project has produced thirteen interviews to date, which will become the basis of an exhibit in 2024 funded by a Stop the Hate Grant from the California Department of Social Services and Asian Health Services.
Community festivals and family programs, including the Asian American Neighborhood Festival, Community History Day, Las Posadas and Dia de los Muertos, continued this year with record attendance. We also introduced free, quarterly family days at El Presidio SHP with engaging topics such as Junior Rangers Day, Archaeology Day, and Historical Games Day, and facilitated free interactive activities for families visiting the park on the weekends.
POP! (Presidio Orchard Party) returned for a second year and the community enjoyed yet another music and drink-filled Casa Cantina at Casa de la Guerra during this year’s Fiesta. We launched our newest fundraiser in April, SBTHP’s Inaugural Golf Tournament at the Glen Annie Golf Club. We look forward to all three of these events returning in 2024 and hope to see you there!

DONOR & MEMBERSHIP EVENTS

POPL (Presidio Orchard Party) returned for a second year and the community enjoyed yet another music and drink-filled Casa Cantina at Casa de la Guerra during this year’s Fiesta. We launched our newest fundraiser in April, SBTHP’s Inaugural Golf Tournament at the Glen Annie Golf Club. We look forward to all three of these events returning in 2024 and hope to see you there!
BY THE NUMBERS: PEOPLE SERVED

1,330
School program attendees

7,642
Public Program participants

33,246
Event rental clients, guests, and markets

15,989
Visited El Presidio SHP and Casa de la Guerra
DONOR REGISTRY

ADVOCATES // MEMBERSHIP
Michael Alvarado
Miroslava Chavez-Garcia
Janet Colby**
Dr. Mary Blackwood Collier
Carol Contreras
Central Coast Real Estate**
Darlene Craviotto and Philip Levien
David de L’Arbre
Mr. and Mrs. David S. Dwelley
Teresa Eggemeyer
Mr. C. W. Fairbanks III
Ms. Nancy H. Fee
Robert and Jane Forsyth
Sally Foxen & Darrell McNeill
Mr. Jeff Haight
Dacia Harwood
Peter and Nancy Jackson
Ms. Lynn P. Kirst
Barry and Kit Liker
Hsingyi Lin**
Dr. Hugo Loaiciga
Emma Malina**
Dr. and Mrs. Arthur Najera
Susan Petrovich
Charles J. Rennie III and Teresa K. Nakashima
Ellen Robinson
Ed and Judy Savage
Leslee and Jeffrey Sipress
Mr. Jack Theimer
Mr. and Mrs. Bob Tuler
Tara and John Wood

ANNUAL FUND
Mr. and Mrs. Roger Aceves
Appleton Partners LLP
Mr. Richard Barbar
Shelley and Mark Bookspan

Mrs. Kathleen Brewster
  In memory of Mary Triplett Ayers
Dr. and Mrs. W. E. Brownlee
Dr. and Mrs. Robert E. Bryant
California Office of the Small Business Advocate
Mr. and Mrs. Reid Cederlof
Terease Chin and Ken Yamamoto
Darlene Craviotto and Philip Levien
Ms. Mary Louise Days
  In memory of Mary Elizabeth Days Alvarado,
  Mary Triplett Ayers, & Lady Georgina Petty-Fitzmaurice
Mary and Marguerite De la Peña
Ms. Pamela F. de Villaine
Betty Dominguez
John and Tracie Doordan
Dennis Doordan
Cass Ensberg
Mr. C. W. Fairbanks III
Mr. Glenn J. Farris
Robert W. Guy**
George Witter and Laurie Hannah
Jessica Haro
John Hayward**
Carolyn Holmquist and Ellen Rauch
Mr. David R. Jackson
Mr. and Mrs. Josiah C. Jenkins
Cecily A. Johns
Debbie and Frank Kendrick
Simon Kiefer**
Mr. and Mrs. Edwin Lenvik
Josh Lieberman**
Sheila Lodge
Mr. and Mrs. William Mahan
Mr. and Mrs. Craig A. Makela
Meridian Group
Patricia Montemayor
Dr. and Mrs. Arthur Najera

Mr. and Mrs. Ron Nye
Old Mission Santa Barbara
Roland and Susan Orfila
Eduardo and Judith Orias
Marlene M. and John F. Perrizo
Anne Petersen, Ph.D.
Mr. John Petersen
Dr. and Mrs. J. Carl Peus
Mr. Philip Pollastrino
Mr. and Mrs. Fred Przekop
Alexandra Rasic**
Mr. and Mrs. Bob Reingold
Steven Rickborn
Suzanne Riley
  In honor of Ms. Mary Louise Days
Ron Robertson
Mr. and Mrs. Richard Rojas
Santa Barbara Tasting Tours**
The Schell Family Charitable Fund
Tom Silva
Leslee & Jeffrey Sipress
Mr. David Stone and Dr. Bev Schwartzberg
Dr. and Mrs. Alexander Tang

ASIAN AMERICAN PROGRAMMING
California Department of Social Services**
George H. and Olive J. Griffiths Foundation

CAS A CANTINA
Mr. and Mrs. Roger Aceves
John and Tracie Doordan
Firestone Walker Brewing Company
Impulse Advanced Communications
Pacific Beverage

CAS A DE LA GUERRA AUDIO PROJECT
Mr. and Mrs. Roger Aceves
Peter and Becky Adams
DONOR REGISTRY

Michael Alvarado
Dr. and Mrs. Robert E. Bryant
Susan and Claude Case
James Patrick and Cecelia S. Donahue
In memory of Mary Triplett Ayers
Betty Dominguez
Harold and Kathy Drake
Laurie Hannah and George Witter
Ms. Letitia Harper
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.
Ashley and Vance Engineering
Linda and Robert Badal**
Mike Bergquist**
Gregory Blix**
Cambran Roofing**
Bunnin Chevrolet**
Chris Carty**
Shawn Considine**
Channel Coast Corporation
Jeffrey Dann**
John and Tracie Doordan
Andrew Doran
Kyle Folks**
Jeremy Gray**
Hammock, Arnold, Smith, & Company
Joe and Tina Handerhan
Harrison Design Associates
Mr. and Mrs. Michael H. Imwalle
Kenney Construction, Inc.
David Lumley**
Mr. Cody A. Makela
George Mansour**
Meridian Group
George Merino**
Mr. Michael Neal Arnold, MAI, MRICS
David Oettinger**
Dr. Monica Orozco
Curtis Peeples**
Anne Petersen, Ph.D.
Mr. and Mrs. John S. Poucher
Mr. and Mrs. Fred Przekop
Steven Rickborn**
Steven & Marta Rocha**
Daniel Sanchez**
Heather Schuyler**
Bill Smolenske**
Cama Stevens**
Mr. David Stone and Dr. Bev Schwartzberg
SW Locksmith**
Alan Turnbull**
Jesse Walz**

Three Pickles Deli and The Pickle Room
Village Properties
Valerie Yoshimura**
Ernest and Leslie Zomalt

KING CARLOS STATUE REINTERPRETATION
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
Carmen Benz**
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. Michael Neal Arnold, MAI, MRICS
Omega Financial Group
Anne Petersen, Ph.D.
Ms. Pat Saley
Mr. and Mrs. Thomas H. Sanborn
Heather Schuyler

Three Pickles Deli and The Pickle Room
Village Properties
Valerie Yoshimura**
Ernest and Leslie Zomalt
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Name and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1989</td>
<td>*Irene Suski Fendon</td>
</tr>
<tr>
<td>1990</td>
<td>*Robert O. Easton</td>
</tr>
<tr>
<td>1991</td>
<td>Mary Louise Days</td>
</tr>
<tr>
<td>1992</td>
<td>*Jean Storke Menzies</td>
</tr>
<tr>
<td>1993</td>
<td>*Ray Strong</td>
</tr>
<tr>
<td>1994</td>
<td>*Joyce Parkinson</td>
</tr>
<tr>
<td>1995</td>
<td>*James G. Mills, Pharm.D.</td>
</tr>
<tr>
<td>1996</td>
<td>*David Gebhard</td>
</tr>
<tr>
<td>1997</td>
<td>*Sue Higman</td>
</tr>
<tr>
<td>1998</td>
<td>*George and Vivian Obern</td>
</tr>
<tr>
<td>1999</td>
<td>*Elizabeth Erro Hvolboll</td>
</tr>
<tr>
<td>2000</td>
<td>*Jeremy D. Hass</td>
</tr>
<tr>
<td>2001</td>
<td>*Helen Schott Pedotti</td>
</tr>
<tr>
<td>2002</td>
<td>David H. Anderson</td>
</tr>
<tr>
<td>2003</td>
<td>City of Santa Barbara Redevelopment Agency</td>
</tr>
<tr>
<td>2004</td>
<td>*Louise Boucher</td>
</tr>
<tr>
<td>2006</td>
<td>*Maria Herold</td>
</tr>
<tr>
<td>2008</td>
<td>Milford Wayne Donaldson</td>
</tr>
<tr>
<td>2009</td>
<td>Glenn Price</td>
</tr>
<tr>
<td>2010</td>
<td>*Kellam de Forest</td>
</tr>
<tr>
<td>2011</td>
<td>*Francisco Gonzalez</td>
</tr>
<tr>
<td>2012</td>
<td>Kathi Brewster</td>
</tr>
<tr>
<td>2013</td>
<td>Old Mission Santa Inés</td>
</tr>
<tr>
<td>2014</td>
<td>*Timothy Aguilar</td>
</tr>
<tr>
<td>2015</td>
<td>Donald G. Sharpe</td>
</tr>
<tr>
<td>2018</td>
<td>Hutton Parker Foundation</td>
</tr>
<tr>
<td>2019</td>
<td>Judith Dodge Orias</td>
</tr>
<tr>
<td>2022</td>
<td>*M. Kay Van Horn</td>
</tr>
<tr>
<td>2023</td>
<td>*Elvira Tafoya</td>
</tr>
</tbody>
</table>

### GEORGE & VIVIAN OBERN PRESERVATION STEWARDSHIP AWARD

<table>
<thead>
<tr>
<th>Year</th>
<th>Name and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>Santa Barbara Foundation</td>
</tr>
<tr>
<td>2003</td>
<td>Palmer Jackson</td>
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<tr>
<td>2003</td>
<td>Nancy Luton Jackson</td>
</tr>
<tr>
<td>2004</td>
<td>Alan Eliot</td>
</tr>
<tr>
<td>2006</td>
<td>Santa Ynez Valley High School Environmental &amp; Spatial Technologies Class</td>
</tr>
<tr>
<td>2007</td>
<td>Casa del Herrero Foundation</td>
</tr>
<tr>
<td>2008</td>
<td>Goleta Valley Historical Society</td>
</tr>
<tr>
<td>2009</td>
<td>The Jimmy Chung Family</td>
</tr>
<tr>
<td>2010</td>
<td>Channel Coast Corporation</td>
</tr>
<tr>
<td>2010</td>
<td>Santa Barbara Contractors Association and Built Green Santa Barbara</td>
</tr>
<tr>
<td>2011</td>
<td>City of Solvang</td>
</tr>
<tr>
<td>2012</td>
<td>La Huerta Project</td>
</tr>
<tr>
<td>2013</td>
<td>Historic Resources Element Task Force, City of Santa Barbara</td>
</tr>
<tr>
<td>2014</td>
<td>Santa Barbara Courthouse Legacy Foundation</td>
</tr>
<tr>
<td>2015</td>
<td>Santa Barbara Maritime Museum</td>
</tr>
<tr>
<td>2016</td>
<td>Katie and David Hay</td>
</tr>
<tr>
<td>2017</td>
<td>Santa Barbara Conservancy</td>
</tr>
<tr>
<td>2019</td>
<td>*Robert Harry Lovejoy</td>
</tr>
<tr>
<td>2022</td>
<td>City of Santa Barbara Department of Parks &amp; Recreation for the restoration of the Cabrillo Pavilion</td>
</tr>
<tr>
<td>2023</td>
<td>Main-Begg Farmhouse</td>
</tr>
</tbody>
</table>

### SUE HIGMAN VOLUNTEER OF THE YEAR AWARD

<table>
<thead>
<tr>
<th>Year</th>
<th>Name and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>Anthony Spann and the Staff of Harrison Design Associates</td>
</tr>
<tr>
<td>2011</td>
<td>Kathy Chalfant</td>
</tr>
<tr>
<td>2012</td>
<td>Terease Chin</td>
</tr>
<tr>
<td>2013</td>
<td>Katherine Lowe</td>
</tr>
<tr>
<td>2014</td>
<td>Jeannie Davis</td>
</tr>
<tr>
<td>2015</td>
<td>*“Buffalo” Joe Schomer</td>
</tr>
<tr>
<td>2016</td>
<td>David Bolton</td>
</tr>
<tr>
<td>2017</td>
<td>Suzi Calderon Bellman</td>
</tr>
<tr>
<td>2018</td>
<td>Terease Chin</td>
</tr>
<tr>
<td>2019</td>
<td>Kyle Slattery</td>
</tr>
<tr>
<td>2020</td>
<td>Valerie Roses</td>
</tr>
<tr>
<td>2022</td>
<td>Pam Iuliano</td>
</tr>
<tr>
<td>2023</td>
<td>Dr. Paul Mori</td>
</tr>
</tbody>
</table>

*Indicates deceased*
AWARD WINNERS

PARTNERSHIP AWARD

2019 Folk Orchestra of Santa Barbara
2022 Mujeres Makers Market

PRESENTER’S AWARD

2022 Cody A. Makela
2023 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
*Harold Kirker
*Garvan F. Kuskey, D.D.S.
Barbara S. Lindemann
Sheila Lodge
*Richard Lugo
*William F. Luton, Sr.
Craig A. Makela
*Jean Storke Menzies
*James G. Mills, Pharm.D.
*Vivian Obern
Dr. Richard E. Oglesby
*Helen Schott Pedotti
John S. Poucher
*Russell A. Ruiz
*Alice Rypins
*James D. Scheinfeld

*Mike Acosta
Hon. Inocencio F. Arias
Kathy Chalfant
*Father Virgil Cordano
*George “Bud” Decker
*Irene Suski Fendon
Hon. Eduardo Garriguess
Nicole Hernandez
*Jim Higman
Don Kinney
Harry and Ellen Knill
William LaVoie
Father Michael Mahoney

*LIFE HONORARY MEMBERS

Jim Elwell Martinez
*Norman Neuerburg
*George Obern
Ignacio Piña
*Vince Pownall
Dan Preece
Richard A. Rojas
Catherine Rudolph
Russell Clay Ruiz
*Virginia Scott
Steven B. Treanor
Edward A. Williams II
# 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

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total June 30, 2023</th>
<th>Total June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$853,022</td>
<td>$396,243</td>
<td>$1,251,265</td>
<td>$1,450,083</td>
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<tr>
<td>Cash held with fiscal agent</td>
<td>45,128</td>
<td>-</td>
<td>45,128</td>
<td>55,570</td>
</tr>
<tr>
<td>Accounts and grants receivable</td>
<td>1,000</td>
<td>6,000</td>
<td>7,000</td>
<td>1,000</td>
</tr>
<tr>
<td>Gift shop and fundraising inventory</td>
<td>22,866</td>
<td>-</td>
<td>22,869</td>
<td>26,841</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>922,015</td>
<td>404,243</td>
<td>1,326,262</td>
<td>1,533,494</td>
</tr>
<tr>
<td><strong>Property and Equipment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land</td>
<td>1,006,736</td>
<td>-</td>
<td>1,006,735</td>
<td>1,006,735</td>
</tr>
<tr>
<td>Buildings and improvements</td>
<td>568,676</td>
<td>-</td>
<td>568,676</td>
<td>568,676</td>
</tr>
<tr>
<td>Equipment</td>
<td>238,932</td>
<td>-</td>
<td>238,932</td>
<td>228,801</td>
</tr>
<tr>
<td>Artifacts and collections</td>
<td>44,161</td>
<td>-</td>
<td>44,161</td>
<td>44,161</td>
</tr>
<tr>
<td>Total Property and Equipment</td>
<td>2,222,516</td>
<td>-</td>
<td>2,222,516</td>
<td>2,217,722</td>
</tr>
<tr>
<td>Less accumulated depreciation and amortization</td>
<td>(535,988)</td>
<td>-</td>
<td>(535,988)</td>
<td>(530,651)</td>
</tr>
<tr>
<td><strong>Net Property and Equipment</strong></td>
<td>2,222,516</td>
<td>-</td>
<td>2,222,516</td>
<td>2,217,722</td>
</tr>
<tr>
<td><strong>Other Assets</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments (see Notes 3, 11 and 12)</td>
<td>1,479,818</td>
<td>7,107,589</td>
<td>8,587,407</td>
<td>8,164,994</td>
</tr>
<tr>
<td>Cash value of life insurance</td>
<td>25,990</td>
<td>-</td>
<td>25,990</td>
<td>26,993</td>
</tr>
<tr>
<td>Interests in charitable trusts (see Note 4)</td>
<td>245,151</td>
<td>-</td>
<td>245,151</td>
<td>231,960</td>
</tr>
<tr>
<td>Total Other Assets</td>
<td>1,750,559</td>
<td>7,107,589</td>
<td>8,886,548</td>
<td>8,423,947</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$4,895,464</td>
<td>$7,511,822</td>
<td>$12,407,325</td>
<td>$12,175,163</td>
</tr>
</tbody>
</table>
### 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

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total June 30, 2023</th>
<th>Total June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Accounts payable</td>
<td>$ 17,795</td>
<td>$</td>
<td>$ 17,795</td>
<td>$ 8,976</td>
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<tr>
<td>Accrued payroll and vacation pay</td>
<td>84,713</td>
<td></td>
<td>84,713</td>
<td>75,579</td>
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<tr>
<td>Accrued interest</td>
<td>-</td>
<td></td>
<td>-</td>
<td>5,500</td>
</tr>
<tr>
<td>Event deposits and advance facility rentals</td>
<td>82,825</td>
<td>-</td>
<td>82,825</td>
<td>66,445</td>
</tr>
<tr>
<td>Tenant deposits</td>
<td>63,548</td>
<td></td>
<td>63,548</td>
<td>45,950</td>
</tr>
<tr>
<td>Rents received in advance</td>
<td>12,628</td>
<td></td>
<td>12,628</td>
<td>23,070</td>
</tr>
<tr>
<td>Current portion of long term debt</td>
<td>-</td>
<td></td>
<td>-</td>
<td>1,107</td>
</tr>
<tr>
<td>Total Liabilities, all Current</td>
<td>261,509</td>
<td>-</td>
<td>261,509</td>
<td>226,627</td>
</tr>
<tr>
<td>Debt</td>
<td></td>
<td></td>
<td></td>
<td>98,893</td>
</tr>
</tbody>
</table>

| Net Assets                 |                            |                         |                     |                     |
| Without donor restrictions | 2,894,527                  | -                       | 2,894,527           | 3,213,039           |
| Without donor restrictions |                            |                         |                     |                     |
| board designated (see Note 6) | 1,739,458                  | -                       | 1,739,458           | 1,417,731           |
| With donor restrictions (see Note 6) | -                         | 7,511,832              | 7,511,832           | 7,218,873           |
| 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

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total June 30, 2023</th>
<th>Total June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue, Gains and Other Support</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions and grants</td>
<td>$42,076</td>
<td>$66,500</td>
<td>$110,576</td>
<td>$210,506</td>
</tr>
<tr>
<td>Membership dues</td>
<td>11,995</td>
<td>-</td>
<td>11,995</td>
<td>15,100</td>
</tr>
<tr>
<td>Special events (net of expense of $78,104 and $7,317, respectively)</td>
<td>62,288</td>
<td>-</td>
<td>62,288</td>
<td>10,629</td>
</tr>
<tr>
<td>Rental income—commercial properties</td>
<td>1,159,368</td>
<td>-</td>
<td>1,159,368</td>
<td>1,162,468</td>
</tr>
<tr>
<td>Facility rental income</td>
<td>158,575</td>
<td>-</td>
<td>158,575</td>
<td>121,177</td>
</tr>
<tr>
<td>Gift shop and other income</td>
<td>25,050</td>
<td>-</td>
<td>25,050</td>
<td>18,728</td>
</tr>
<tr>
<td>Program income</td>
<td>31,065</td>
<td>-</td>
<td>31,065</td>
<td>22,671</td>
</tr>
<tr>
<td>Change in value of charitable trusts</td>
<td>13,191</td>
<td>-</td>
<td>13,191</td>
<td>(28,812)</td>
</tr>
<tr>
<td>Interest on loans receivable and checking</td>
<td>7,918</td>
<td>-</td>
<td>7,918</td>
<td>1,303</td>
</tr>
<tr>
<td><strong>Investment income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>46,383</td>
<td>190,147</td>
<td>236,530</td>
<td>239,159</td>
</tr>
<tr>
<td>Investment expenses</td>
<td>(10,910)</td>
<td>(54,921)</td>
<td>(65,831)</td>
<td>(74,774)</td>
</tr>
<tr>
<td>Realized gains</td>
<td>(23,830)</td>
<td>(138,306)</td>
<td>(162,636)</td>
<td>36,478</td>
</tr>
<tr>
<td>Unrealized gains (losses)</td>
<td>140,787</td>
<td>636,347</td>
<td>777,134</td>
<td>(1,523,910)</td>
</tr>
<tr>
<td><strong>Net investment income</strong></td>
<td>152,430</td>
<td>632,767</td>
<td>785,197</td>
<td>(974,947)</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>408,306</td>
<td>(408,306)</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Total Revenue, Gains and Other Support</td>
<td>2,072,264</td>
<td>292,959</td>
<td>2,365,223</td>
<td>566,823</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>1,753,370</td>
<td>-</td>
<td>1,753,370</td>
<td>1,463,268</td>
</tr>
<tr>
<td>Management and general</td>
<td>235,433</td>
<td>-</td>
<td>235,433</td>
<td>146,432</td>
</tr>
<tr>
<td>Fundraising</td>
<td>60,246</td>
<td>-</td>
<td>60,246</td>
<td>75,993</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>2,069,049</td>
<td>-</td>
<td>2,069,049</td>
<td>1,686,693</td>
</tr>
<tr>
<td><strong>Increase (decrease) in Net Assets</strong></td>
<td>3,215</td>
<td>292,959</td>
<td>296,174</td>
<td>(1,119,870)</td>
</tr>
<tr>
<td><strong>Net Assets at Beginning of Year</strong></td>
<td>4,630,770</td>
<td>7,218,873</td>
<td>11,849,643</td>
<td>12,969,513</td>
</tr>
<tr>
<td><strong>Net Assets at End of Year</strong></td>
<td>$4,633,985</td>
<td>$7,511,332</td>
<td>$12,145,617</td>
<td>$11,849,643</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Cash Flows from Operating Activities</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase (decrease) in net assets</td>
<td>$296,174</td>
<td>(1,119,870)</td>
</tr>
<tr>
<td>Adjustments to reconcile increase (decrease) in net assets to cash used by operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation</td>
<td>18,500</td>
<td>22,895</td>
</tr>
<tr>
<td>Unrealized gain on investments</td>
<td>(777,134)</td>
<td>1,523,910</td>
</tr>
<tr>
<td>Realized gain on investments</td>
<td>162,636</td>
<td>(384,578)</td>
</tr>
<tr>
<td>Change in operating assets and liabilities</td>
<td>(5,000)</td>
<td>2,082</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift shop inventory</td>
<td>3,972</td>
<td>(2,380)</td>
</tr>
<tr>
<td>Cash surrender value</td>
<td>1,003</td>
<td>(1,181)</td>
</tr>
<tr>
<td>Interests in charitable trusts</td>
<td>(13,191)</td>
<td>26,813</td>
</tr>
<tr>
<td>Accounts payable</td>
<td>8,819</td>
<td>(41,549)</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>3,634</td>
<td>16,442</td>
</tr>
<tr>
<td>Event deposits</td>
<td>16,380</td>
<td>52,805</td>
</tr>
<tr>
<td>Tenant deposits and rents received in advance</td>
<td>7,155</td>
<td>5,529</td>
</tr>
<tr>
<td><strong>Net Cash (Used by) Provided by Operating Activities</strong></td>
<td>(278,051)</td>
<td>101,918</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cash Flows from Investing Activities</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceeds from sale of investments</td>
<td>2,178,077</td>
<td>1,612,444</td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>(1,985,991)</td>
<td>(1,454,770)</td>
</tr>
<tr>
<td>Purchase of fixed assets</td>
<td>(23,295)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Net Cash Provided by Investing Activities</strong></td>
<td>168,791</td>
<td>157,674</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cash Flows from Financing Activities</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment against debt obligation</td>
<td>(100,000)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Net Cash Used by Financing Activities</strong></td>
<td>(100,000)</td>
<td>-</td>
</tr>
</tbody>
</table>

| 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 Dia 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.