

Annual Report

Santa Barbara **C**OURTHOUSE **L**EGACY **F**OUNDATION



COURTHOUSE LEGACY FOUNDATION

BOARD OF DIRECTORS



President: *Bill Mahan, AIAE*
Years of service: 7

Vice President: *Sue Adams*
Years of service: 11

Secretary: *James Ballantine, Esq.*
Years of service: 8

Treasurer: *Tim O'Keeffe, CPA*
Years of service: 6

Rodney Baker
Years of service: 5

Randall Barnes
Years of service: 2

Herb Barthels
Years of service: 3

Carol Fell
Years of service: 10

Britton Jewett, AIA
Years of service: 8

Ed Lenvik, AIA
Years of service: 3

Isabella Madarang
Years of service: 1

Olivia Marr, Esq.
Years of service: 2

Keith J. Mautino
Years of service: 7

Robert Mislang
Years of service: New

Katherine Murray-Morse
Years of service: 2

Carole Sterpa
Years of service: 1

Steve Thompson
Years of service: 1

Docent Council Representative: *Dana Machalleck*

Honorary Trustees

David Anderson

Sheila & Frank McGinity

Michael 'lowbes

Alice Van de Water

Founding Trustees

Hon. Naomi Schwartz

Hon. Frank Ochoa

Robert Ooley, FAIA

Executive Director: *Linda Rosso*

Bookkeeper: *Linda Hanten*

Letter from the President and Executive Director

We are happy to report that 2015 has been an exceptional year for the Santa Barbara Courthouse Legacy Foundation (CLF). We are assembling our first CLF Annual Report and reflecting on this past year. We are proud to share accomplishments and updates thanks to our partnerships, commitments from foundations, grants, donors, and individuals.

The restoration of 4200 square feet of hand painted murals and museum lighting in the iconic Mural Room is a significant achievement. Through the generosity of the Hind Foundation, WWW Foundation, Michael and Ann Towbes, Ayrshire Foundation, Sebastiano and Carole Sterpa, Ann Jackson Foundation and numerous donors, we were able to complete the full restoration. CLF accomplished this project, on time and under budget. Dedicated trustees watched over conservators, Evergreene, and reported updates on a weekly basis. We held 'behind the scenes' tours to share the technology and scope of services involved in the restoration.

During the year, the Development and Endowment Committee, along with staff, worked diligently to complete a three-year strategic plan. In partnership with the Santa Barbara Foundation, our planned giving program, the Legacy Society was successfully launched. Plans for a new office location on the first floor are underway, and a total of six new members joined the Board of Trustees. We are pleased to share that our Membership Circle is successfully gathering new members along with renewals and the community continues to marvel at the beauty of the castle we are fortunate enough to call our courthouse.

In addition to our traditional Fiesta Party, we completed our 2nd Annual Miniature Golf Tournament fundraiser. The Tournament was played on the courthouse grounds, followed by an after party in the Sunken Gardens.

We promoted our Development Director, Linda Rosso to the position of Executive Director. We have also created a large volunteer group of community members, dedicated to helping maintain our magnificent courthouse for current and future generations to enjoy. We began the Courthouse Legacy Foundation in 2004 and since that time we have raised over 2 million dollars to preserve our courthouse, a City, State, and National Historic Landmark. We are thankful to all of you who have helped us over the last eleven years and are proud of the progress we have accomplished together. The community built the Courthouse.....together we are creating the Legacy.

Kindest regards,

William Mahan — *Linda Rosso*

William Mahan, AIA
Board Chair and President

Linda Rosso
Executive Director



RESTORATION PROJECTS

Mural Room Restoration in 2015, cost \$544,000



*Main Archway Ceiling
(Pearl Chase Society) in
2009, cost \$68,000*



*Spirit of the Ocean Fountain
Restoration in 2011, cost \$822,000*



On behalf of our Board of Trustees, we wish to thank the following foundations for their generous support:

Hind Foundation
Towbes Foundation
WWW Foundation
June Outhwaite Charitable Trust
Pearl Chase Society
Santa Barbara Foundation
Warling Foundation, Inc.

Samuel B & Margaret
C Mosher Foundation
Ayrshire Foundation
Bessemer Trust
Ann Jackson Family Foundation
Harrold Simmons Foundation
Kirby Family Foundation

Community Dividends-
Montecito Bank & Trust
Godric Foundation
Union Bank Foundation
Hotchkiss Family Foundation
Santa Barbara Arts
Commission

AND AWARDS

*Bisno-Schall Clock Gallery
Restoration in 2013, cost \$270,000*



*Historic Structures Report
in 2012, cost \$81,000*



The Board of Trustees thanks the County Board of Supervisors and the City of Santa Barbara for their support with our mission to preserve our historic Courthouse.

Designations and Awards

1980: National Register of Historic Places

1981: City of Santa Barbara Historic Landmark

2003: State Historic Landmark

2005: National Historic Landmark

2005: Preservation Award- given by the California Preservation Foundation (state wide competition): Hall of Records Rehabilitation

2011: Tucker Design Award- given by the Building Stone Institute (national competition): Fountain Project

2012: Pinnacle Award-given by the Marble Institute of America (national competition): Fountain Project

2012: Grand Pinnacle Award-given by the Marble Institute of America (national competition - selected from all the Pinnacle Award recipients): Fountain Project

2012: California Governor's Award; Historic Preservation (state wide competition): Fountain Project

2013: Santa Barbara Conservancy Award (local competition): Fountain Project

2013: Santa Barbara Beautiful Award (local competition): Clock Gallery Project

2015: California Governor's Award; Historic Preservation (state wide competition): Clock Gallery Project



*County Architect
Robert Ooley, FAIA*

2015 EVENTS

Hard Hat Party - February 20, 2015

behind the scenes of the Mural Room restoration



Evergreene Architectural Arts Team & Robert Ooley

Restoration in progress!

'Behind the scenes' guests

Mural Room Ribbon Cutting Ceremony - June 10, 2015

celebrating the Mural Room restoration



City Councilman Bendy White and President Bill Mahan



CLF Trustees and Councilman

Legacy Society Luncheon - June 24, 2015

our Planned Giving Program takes off!



Bill Mahan & Katherine Murray-Morse



Rodney Baker



Todd & Patti Gutshall

AND NEWS

Fiesta Party - August 7, 2015 *celebrating accomplishments and creating awareness*



View of the Las Noches de Ronda ("Nights of Gaiety")



Mexican Feast
on the Loggia



Board Vice President
Sue Adams and
President Bill Mahan



Santa Barbara Foundation Foursomes

2nd Annual Golf Tournament - September 18 & 19, 2015 *fun for members and the community alike*



Community Day Winners –
all kids play free of charge



Santa Barbara Symphony hole

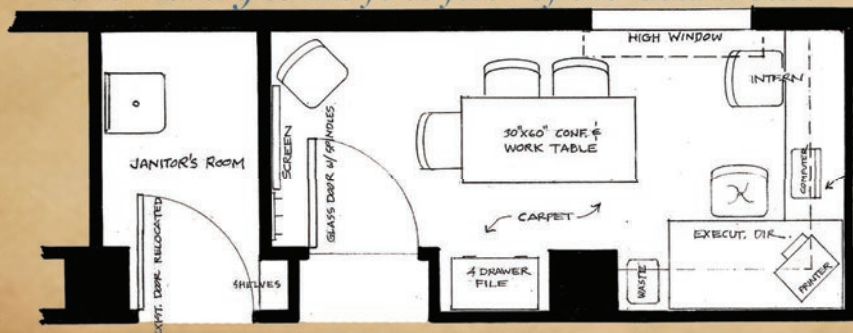


After party in the Sunken Gardens



Who will hold the trophy
next year?

New CLF Office *we're moving to the first floor of the Courthouse!*



The Foundation thanks Linda Van der Wyk, our County of Santa Barbara liaison for events, and the Courthouse Docent Council for their daily tours and support over the last decade.

Courthouse Legacy Foundation Strategic Plan

In 2014 the board saw the need to create an endowment to insure the long term viability of CLF. Until then, our primary plan had been the 5-year project plan under the MOU established with the County of Santa Barbara, prioritizing Courthouse conservation and restoration projects.

The board believed it was important to provide a framework around our core project based funding in order to educate and better serve the public and develop sustainable funding. An endowment committee was formed to develop the plan and elicited feedback from board members and outside stakeholders. The plan was approved by the board, May, 2015. Highlights include:

Objectives:

- ☐ Broaden focus to a mission focused organization from specific projects
- ☐ Create greater awareness of the Courthouse as an architectural treasure and cultural resource
- ☐ Enhance educational focus. Knowing about the Courthouse and historic preservation is important to the community and visitors to Santa Barbara. Coordinate with groups such as the docents.
- ☐ Identify opportunities and challenges for growth: build internal capacity, permanent office space needed, dedicated staff for donor and fund development, and ongoing board leadership with identified skills

Initiatives (next 12 – 18 months):

- ☐ Establish an endowment and create a Legacy Society for long term support. Hold a lunch to thank donors and “kick-off” a mini-endowment campaign. (June, 2015)
- ☐ Secure a dedicated office for CLF in the courthouse (2015-early 2016)
- ☐ Hire dedicated staff for CLF and fund development (Linda Rosso, Executive Director, July, 2015)
- ☐ Establish Membership structure, with different giving levels, to create engagement with the Courthouse and encourage involvement from the community (Fall, 2015)
- ☐ Review board governance and structure to create greater transparency and committees aligned with strategic plan achievement (2016)
- ☐ Hold a facilitated board retreat to build teamwork and enhance fund development (2016)

Financial Report - 2014

Revenue and Support	\$343,718
Expenses	\$113,011
Net Income	\$230,707
Total Assets	\$566,276
Total Net Assets	\$566,276

Revenue and Support



Expenses



Courthouse Legacy Society and Planned Giving Program

The Santa Barbara Courthouse Legacy Foundation established an endowment fund with the Santa Barbara Foundation in 2015 and created the **Courthouse Legacy Society**. It also launched a five year campaign to raise \$2,500,000 for the endowment and to encourage individuals with a connection to the community and the courthouse to make a bequest in their will or as part of their estate plan to help secure the future and create a charitable legacy.

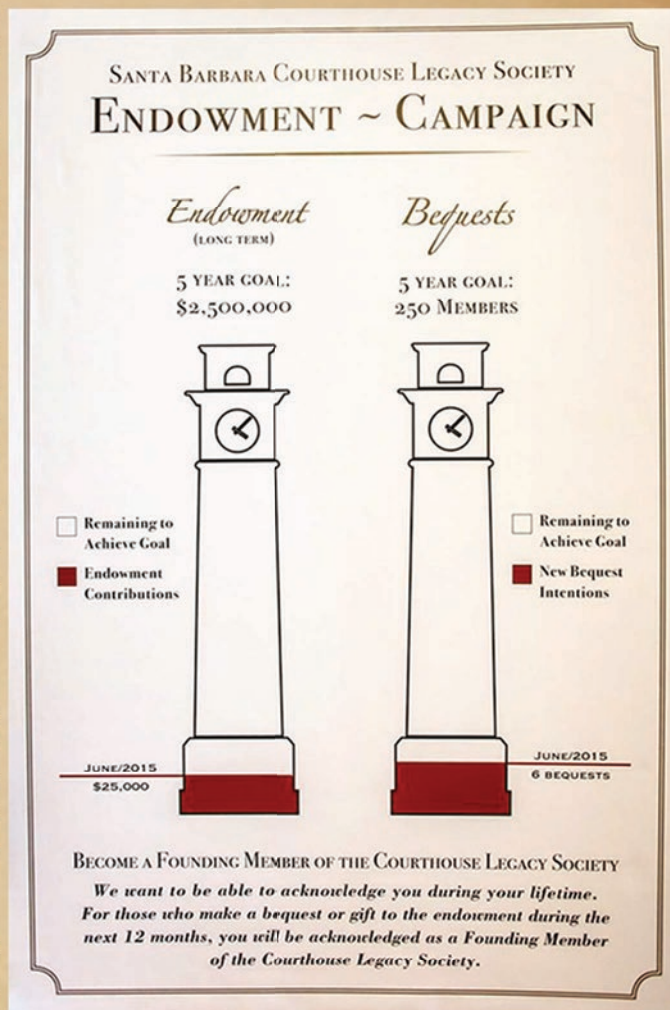
The endowment will enable the Santa Barbara Courthouse Legacy Foundation to ensure ongoing stability and fund operations so that works connected to the preservation, restoration and educational legacy of the Santa Barbara Courthouse may be carried on for future generations.

To-date contributions of \$25,000 have been made to the endowment and there are 7 individuals who have made bequests. Individuals or trusts who make a bequest or contribution by June 1, 2016 will be acknowledged as a ***Founding Member** of the **Courthouse Legacy Foundation**.

Gifts may be made directly to the endowment or through a bequest. The Santa Barbara Foundation provides professional assistance for donors making charitable gifts. Gifts may be made in a variety of ways including: cash, non-cash assets such as stock, charitable bequests, gifts of retirement plan assets, life insurance or charitable trusts.

Additionally, the Santa Barbara Foundation, with its investment and planned giving expertise (in concert with CLF) can help individuals realize their legacy through planned gifts such as a Charitable Gift Annuity, ensuring fixed income for life; Charitable Trusts including Charitable Remainder and Charitable Lead Trusts, with unique tax, estate planning and philanthropic advantages; as well as Real Estate Trusts, your home or another property, to unlock the full appraised value for tax wise giving and community impact.

For further information on bequests, direct gifts to the endowment or planned gifts, please contact Linda Rosso, (Exec. Director, CLF) at (805) 770-7222 or Jan Campbell (SVP, Santa Barbara Foundation) at (805) 963-1873.



***Founding Members**

Rodney Baker and Robert Ooley
Herb Barthels
Bill & Nyna Mahan
Keith Mautino
Katherine Murray-Morse

Gifts may be sent to: SB
Courthouse Legacy Foundation,
c/o Santa Barbara Foundation,
1111 Chapala Street, Ste. 200,
Santa Barbara, CA 93101-3100.

COURTHOUSE LEGACY FOUNDATION

MEMBERSHIP CIRCLE BENEFITS

Individual Level - \$75 per individual

Includes CLF newsletter, recognition on website and in annual report

Family Level - \$100 per family

Includes CLF newsletter, recognition on website and in annual report, and the Santa Barbara County Courthouse book by Patricia Gebhard and Kathryn Masson

Supporter Level - \$250 per family

Includes CLF newsletter, recognition on website and in annual report, the Santa Barbara County Courthouse book by Patricia Gebhard and Kathryn Masson, CLF tote bag, and 25% discount of CLF events

Sustaining Level - \$500 per family

Includes CLF newsletter, recognition on website and in annual report, the Santa Barbara County Courthouse book, CLF tote bag, 25% discount on golf tournament, 2 Fiesta Party tickets, an exclusive behind the scenes after hours event with wine and appetizers, and a private members only annual party

Sponsor Level - \$1000 per family

All of the above, and 50% discount on golf tournament, 4 Fiesta Party tickets, after hours tour with wine and appetizers, premier seating at events, and a private members only annual party

Patron Level - \$2500 per family

All Sponsor level benefits plus a private cocktail party at the top of the Tower for 10!

COURTHOUSE LEGACY FOUNDATION

DONORS \$500 and above

\$100,000 – \$500,000

Hind Foundation
Dr. David Bisno
Dick and Maryann Schall
Towbes Foundation
WWW Foundation

\$50,000 – \$100,000

County of Santa Barbara
Stephen Hahn
June G. Outhwaite Charitable Trust
Pearl Chase Society
Santa Barbara Foundation
Samuel B & Margaret C Mosher Foundation

\$25,000 – \$50,000

Ayrshire Foundation
Bessemer Trust
City of Santa Barbara
Bob Hahn
Pam Hamlin
Mr. & Mrs. Palmer Jackson Sr.
Bill & Nyna Mahan
Wells Fargo Foundation

\$10,000 – \$25,000

David Anderson
James Ballantine
Isabelle Cohen
Carol & Doug Fell
Stephen Hahn
Harrold Simmons Foundation
Hollister & Brace
Kirby Family Foundation
Montecito Bank & Trust
NS Ceramics, Inc. – Nola Stucky
Santa Barbara Arts Commission
Sebastiano & Carole Sterpa
Dr. David Thomas
John Woodward

\$2,500 – \$10,000

Sue Adams
Rodney Baker
Randy Barnes
Herb Barthels
Helene & Jerry Beaver
Ann Jackson Family Foundation
Chicago Title Company
Cox Communications
Diane Dodds
Fell, Marking, Abkin, Montgomery, Granet & Raney, LLP
Brad Ginder
Patti Gutshall

Godric Foundation
Peter Jordano
Ed Lenvik, AIA
John Mackall
Keith Mautino
Sheila & Frank McGinity
Lynn Montgomery
Katherine Murray-Morse
Tim O'Keeffe
Robert Ooley, FAIA
Ray Peppard
David Pitts Memorial Fund
Loretta Redd, PhD
Kristi Rothschild
Santa Barbara Bank and Trust
Santa Barbara Paralegal Association

Santa Barbara Style
Jean Scheibe
Wayne Siemens
Studio 7 Architecture, AIA
William Thomas
Union Bank Foundation
Alice Van de Water
James Westby
Ron and Charlotte Williams
Wolf Pictures
Joanie Zacher

\$500 – \$2,500

Barbara Allen
Allen & Kimbell, LLP
Honorable Thomas Anderle
Sonia Anderson
Arnold's Restaurant
Athenaeum Capital Partners
Elle Bajor
Alan Blakeboro
Ron Boehm
David Borgatello
Bill Brace
Sharon and David Bradford
Laura Bridley
Leslie Brtek
Robert Burtness
Cabana Home
Randy Campbell
Maggy Cara
Cernal Andrulaitis LLP
Reid Cederlof
Susan Chapman
Charles Schwab & Company
Fred Clough
Consolidated Electrical Dist. Inc.
James Cote

Nancy Crawford
DCH California Motors
James De Loreto
Kellem DeForest
Jill Dore Kent
John Dudley
Gordon Durenberger
Jacqueline Dyson
Peter Ehlen
Virgil Elings
Edward Evenson
Dr. Robert Failing
Lynda Fairly
Jan and Ken Ferrell
First American Title Company
Foley Bezek Behle & C Jr.
Lylie Francis
Fred Sweeney, AIA
Bill Gordon
Hager & Dowling
Hammock, Arnold, Smith & Company
Stanley Hatch
Hayward Lumber
Heritage Oaks Bank
Kent Hodgetts
Hotchkiss Family Foundation
Howell, Moore & Gough
David Huyck
James Jackson
John Kinneer
Paula Kislak
Bob and Nancy Knight
Joan Kreiss
Stella Larson
George Leis
Jim Lichtman
Lillian Lovelace
Barbara Lowenthal
Diana MacFarlane
MacFarlane, Faletti & Co., LLP
Maps.com
MarBorg Industries, Inc.
Olivia Marr
Maureen Masson
Lynn Kirst-Matteson
Christy McAvoy
Steven McGovern
McGowan Guntermann
Pamela McLean
Howard Menzel
Meyers, Nave, Riback, Silver & Wilson Attorneys at Law
Ladeen Miller
Frederick Montgomery, Esq

Jane Mueller
Mullen & Henzell LLP
John Murphy
Naomi Schwartz Living Trust
Neovia Integrated Insurance Services
Joyce Niland
Northern Trust
NYE, Peabody, Stirling & Hale
Hon. Frank Ochoa
Patricia Ottoboni
Madars Ozolins
Pacific Western Bank
Robert Pearson
Mrs. David Pitts
Pitts & Bachmann Realtors
Jamey F. Raney
Joanne Rapp
Reicker, Pfua, Pyle, McRoy & Herman LLP
Rogers Sheffield & Campbell LLP
Linda and Steven Rosso
Rotary Club of Goleta
Terrence Ryken
Sanford Winery
Santa Barbara Docent Council
Santa Barbara Independent
Debbie Saucedo
Robin Schutte
Bruce Scollin
Sheppard, Mullin, Richter & Hampton, LLP
Sotheby's
Prudence Squire
Colleen Sterne
Kay Stevens
Selby Sullivan
The Richard Wolf Trust of 2003
Tricoast Insurance Services LLC
Tony Urquidez
Daniel Vapnek
Amy Venturi
Village Properties
William Vollero
Dennis Walsh
Watling Foundation, Inc.
Nicholas Weber
Judy Weisman
Bendy White
Dale Wilson
Eric A. Woosley, APC
Bill Wright
Jim Yabsley
Sandie Zander

Annual Report

Courthouse Legacy Foundation
PO Box 91459
Santa Barbara, CA 93190
Phone 805-770-7222

The Santa Barbara Courthouse Legacy Foundation
www.courthouselegacyfoundation.org



*Photograph by
Ronald L. Williams*

Our mission is to fund conservation, preservation, restoration
and education projects so current and future generations can
enjoy the Santa Barbara Courthouse.

CLF is a 501(c)3 non-profit,
tax-exempt organization
Federal tax ID #20-1174366

Become a member today!



Find us on
Facebook!