

2010



ANNUAL REPORT



**THE
GEORGIA
TRUST**

RECLAIM • RESTORE • REVITALIZE

A Year in Review

Fiscal year 2010: April 1, 2009 – March 31, 2010

2010

was a transformative year for The Georgia Trust. Due to the hardworking and energetic Board of Trustees, committees and staff of the Trust, we closed our fiscal year, which ended on March 31, 2010, with a budget surplus. This positive result was achieved at the statewide office in Atlanta and at the Hay House in Macon. This was a remarkable achievement in light of overall economic conditions and even more impressive because The Georgia Trust did not curtail its preservation programs.

The credit for this excellent fiscal year starts with the Chairman of the Board of Trustees, Mr. Kimbrough Taylor. Since his election, Mr. Taylor has dramatically increased the engagement of our Trustees by holding more meetings and by enhancing the level of involvement with his inspirational leadership. The Trustees have answered this call by giving generously of their time, financial resources and knowledge. The staff of the Trust is greatly indebted to them individually and collectively. The leadership team at Hay House led by Bert Maxwell IV, Tom Wight, Bonnie Dowling, Katey Brown and others has also made a tremendous impact. The staff of The Georgia Trust are due special recognition this year. They have worked together as a cohesive team and accordingly all deserve our special gratitude.

PRESERVATION ASSISTANCE

This year, the Georgia Trust for Historic Preservation provided *Preservation Assistance* to more than 120 individuals seeking information and advice on what they can do to save historic buildings, structures and sites in their communities. *Preservation Assistance* inquiries cover a wide variety of topics which are addressed to the best of our knowledge, making all the necessary efforts to aid the individuals or refer them to others who can offer further assistance. Common *Preservation Assistance* topics include tax incentives, available grant money, consultants, local historic district information, best practices for historic preservation projects, and nominations and listings for inclusion in the National Register of Historic Places.

The following areas of Georgia received preservation assistance during the 2010 fiscal year: Acworth, Alpharetta, Athens, Atlanta,



In August 2009 The Georgia Trust partnered with owners of the Georgia Theatre to set up a fund dedicated to the rehabilitation of the historic theater in Athens that was destroyed by fire in late June 2009.

Augusta, Bainbridge, Bibb County, Buckhead, Buford, Clarkesville, Clarksdale, Clayton County, Clermont, Clinton, Columbus, Cordele, Cumberland Island, Decatur, Decatur County, Duluth, East Point, Eatonton, Fort Valley, Griffin, Kennesaw, LaGrange, Louisville, Macon, Madison, Marietta, Monroe, Patilla, Sandersville, Savannah, Smyrna, Social Circle, Sparta and Thomasville.

PRESERVATION PARTNERS

The *Preservation Partners* program allows The Georgia Trust to partner with groups embarking on preservation projects whose preservation experience or resources may be limited. The

Georgia Trust's role in the partnership is tailored to meet the needs of the group conducting the project, but can include offering technical advice, design assistance, joint marketing efforts, or assistance with acquiring grants and donations. During FY2010, two projects received assistance through *Preservation Partners*. These projects included Patton's Roundhouse at Fort Benning in Columbus, Georgia, for which The Georgia Trust manages grant money allocated for the building's extensive rehabilitation project, and the Georgia Theatre, for which The Georgia Trust manages a fund of donated money that is used to pay invoices of rehabilitation expenses for this historic theatre that was devastated by a fire in June 2009.

PARTNERS IN THE FIELD

The *Partners in the Field* program, which launched in 2008, provides preservation services for the *Places in Peril* program, as well as offers general preservation services throughout the state.

2008 *Places in Peril* Site

MILLER HIGH SCHOOL, MACON

A study funded by the John S. and James L. Knight Foundation was completed to examine redevelopment and market potential for the 1930 A.L. Miller Senior High, which is owned by the Bibb County Board of Education. The study encouraged the owner to hand the property over for redevelopment; these negotiations are underway.

2009 *Places in Peril* Sites

BATTERY BACKUS, TYBEE ISLAND

The listing of Battery Backus as a 2009 *Place in Peril* facilitated the creation of local historic districts on Tybee Island and a Fort Screven Historic Review Commission. Requests to develop the property (and destroy the Battery) were denied under the Georgia Coastal Protection act.

METCALFE TOWNSHIP, THOMAS COUNTY

In order to promote appropriate redevelopment of the Metcalfe Township, a visioning resource team met in November 2009. This effort was funded by a \$7,000 grant from The Georgia Trust; findings and recommendations were presented in February 2010. The study found that improved streetscapes and slowed traffic would help visitation to the small town; crosswalks, sidewalks and landscaping were recommended. The town has started to implement some of these recommendations.

SALLIE ELLIS DAVIS HOUSE, MILLEDGEVILLE

On June 5, 2009, a spotlight event raised local awareness for this historic home. Working with the Georgia College and State University, which owns the building, as well as the Sallie Ellis Davis Foundation and The Georgia Trust, the Sallie Davis House was awarded a \$10,000 grant for stabilization work. The building was lifted and all foundation piers were replaced, stabilizing the structure for future restoration work. Restoration efforts, as of the fiscal year end, were nearly complete.



Central State Hospital in Milledgeville was selected as a 2010 *Places in Peril* site. The Trust held three volunteer workdays at the facility during fiscal year 2010.

2010 Places in Peril Sites

CENTRAL STATE HOSPITAL, MILLEDGEVILLE

Central State Hospital (CSH), once the nation's largest mental hospital and second largest in the world, is threatened by vacancy and abandonment. A workday in Spring 2010 focused on the collections and interior conditions of the former train depot, which is currently used as the CSH museum. A task force was formed and met in late July, outlining plans to assist a local college (Georgia College and State University) to reuse structures that encompass Central State's historic buildings.

CANTON GRAMMAR SCHOOL, (BUILDING B.), CANTON

The Canton Grammar School, threatened by demolition by the Cherokee County Board of Education (BOE), was built in 1914. On February 4, 2010, the Cherokee County BOE met to focus on the three options for the building, and voted unanimously to table discussions until a further date. The three options included building a new school complex near the existing administrative offices, destroying the current building to make way for a new complex, and finally, to rehabilitate the current structure for administrative office space.

DODGE COUNTY JAIL, EASTMAN

Built in 1897, the Old Dodge County Jail suffering from lack of maintenance and funding was nominated to the National Register of Historic Places by volunteer Trent Myers.

DORCHESTER ACADEMY, MIDWAY

Founded in 1871 to educate freed slaves, Dorchester Academy in the 1960s was used for a center for Citizen Education Programs sponsored by the Southern Christian Leadership Conference. Widespread failure of the roofing system resulted in extensive damage to the property. Dorchester Academy received the Lowe's Charitable and Educational Foundation Preservation Fund Grant for Historic Schools.

MAIN STREET DESIGN ASSISTANCE

The Trust's *Main Street Design Assistance* (MSDA) program, a partnership with Georgia's Department of Community Affairs, provided valuable guidance to downtown development efforts in Georgia communities during fiscal year 2010. MSDA manager Evan Thi-beault oversaw 26 design projects in 14 cities, spanning the state from Tybee Island to Trenton. Most of these projects involved adaptive use of historic buildings. Streetscapes and traffic-calming measures for historic districts were also common themes.



The E.M. Rogers House in Adel, Georgia was sold through the Trust's Revolving Fund program.

ENDANGERED PROPERTIES PROGRAM

The *Endangered Properties Program* consists of two divisions: the *Revolving Fund* and *Easements*. The Georgia Trust established its *Revolving Fund* program in 1990 to provide effective alternatives to demolition or neglect of historic properties through real estate transactions. The program utilizes marketing strategies designed to find qualified buyers able to purchase and rehabilitate endangered properties. Purchasers of *Revolving Fund* properties are required to sign rehabilitation agreements and adhere to conservation easements retained by The

Georgia Trust. During the 2010 fiscal year, The Georgia Trust marketed four endangered properties through its *Revolving Fund*. The Georgia Trust sold one property, the E.M. Rogers House in Adel, Georgia, which is currently being rehabilitated. Also in FY2010, The Georgia Trust used its *Revolving Fund* to purchase a historic property in Madison, Georgia to save it from demolition. The property is now for sale through this program.

The Georgia Trust's *Easements* program offers historic property owners the opportunity to receive economic incentives through the charitable donation of a conservation easement. Generally, easements pertain to the exterior of a building and require the donor and all subsequent property owners to maintain the condition of the exterior while preserving its historic integrity. All easements held by The Georgia Trust, whether they were acquired by donation or retained from a revolved property, are annually inspected and reported. With the help of a graduate research assistant from Georgia State University, The Georgia Trust inspected 35 easement properties from across the state during the Winter 2010. Additionally, one of these properties, the Cowen House, announced its post-rehabilitation grand opening in March 2010, after being purchased from The Georgia Trust's *Revolving Fund* in 2009.



The Georgia Trust used its Revolving Fund to purchase a historic property in Madison, Georgia to save it from demolition. The property is now for sale through this program.

TALKING WALLS

Talking Walls, The Georgia Trust's *Heritage Education* program, encourages and supports local historical societies and preservation non-profit organizations who serve as facilitators of workshops that train educators to use historic resources, such as maps, buildings, photographs and oral histories, as teaching aids in their lesson plans. This program is certified by the Department of Education and provides three Professional Learning Unit Credits to each participant of the week-long workshop. The success of *Talking Walls* manifests in the classroom where, since 1991, nearly 2,050 teachers in 61 different school systems have brought heritage education to their students.

In 2009, The Georgia Trust received a grant from the Georgia Humanities Council, which allowed it to support five workshops offered by four different organizations: Hay House, DeKalb History Center, Thomasville Landmarks, and Cobb Landmarks and Historical Society. The Georgia Trust would like to express its gratitude and offer thanks to the generous grant from the Georgia Humanities Council, the continued support of the Williams Foundation, and the hard work and dedication of each *Talking Walls* facilitator and participant.

GaPA

Georgians for Preservation Action (GaPA) is Georgia's statewide coordinating council for historic preservation advocacy. Since its founding in 1987, GaPA has advocated laws, programs and policies that promote the preservation of Georgia's historic resources by mobilizing grassroots preservationists across the state.

GaPA's priority issue for the 2010 Legislative Session was to maintain current state funding levels for those state and federal programs that deliver critical preservation services in Georgia, including: the National Register, tax incentives, financial assistance, environmen-



The Georgia Trust Preservation Gala, which was held in March 2010, showcased one of Philip Shutze's Atlanta masterpieces, the Goodrum House, and far exceeded our revenue goal. Pictured: Event chairs Ken and Tamara Bazzle with honorary chairs Elizabeth Hale, Sheffield Hale



The first annual dog-friendly Uptown Rhodes Race 5K was huge success. More than 300 runners, walkers, and their dogs completed the 3.1 mile course through the historic neighborhoods of Ansley Park and Sherwood Forest.

Living Rooms. Renowned paint analyst Susan Buck, in collaboration with a team of conservators from International Fine Arts Conservation Studio (IFACS), studied paint samples from the Dining Room ceiling and walls to determine a color palette appropriate to the Johnston (1860-1890) era. Likewise, Scalamandre was commissioned to recreate the Hay-era (c.1962) wallpaper in the Living Room, and the condition of the furnishings was studied. Under the leadership of advisor Bonnie C. Dowling, both the Restoration Committees at Hay House and The Georgia Trust met for workdays to review historic photographs and items in collections storage to make decisions about

tal review, archaeology, regional planners and *Main Street Design Assistance*. GaPA also devoted attention to historic properties in the Department of Natural Resources Parks, Recreation and Historic Sites Division, the Land Conservation Act, and the Coalition for Full Funding of the Historic Preservation Fund.

GEORGIA TRUST SPECIAL EVENTS & RHODES HALL

Fiscal year 2010 started out strong with a new event, the *Uptown Rhodes Race*, which attracted over 300 runners, walkers and canines to the streets of the historic Ansley Park neighborhood. Ramblers explored the picturesque towns of Washington in the fall and Rome in the spring. *Santa at Rhodes Hall* expanded to include our first "VIC (Very Important Children) Night, when the children and families of Camp Sunshine enjoyed their own special night with Santa. *Cupid at the Castle* sent 25 couples to the altar, and *Classics at the Castle* hosted mezzo soprano Magdalena Wor in the fall and the students of the McDuffie School of Strings in the spring. The fiscal year ended in grand style with the 26th annual *Preservation Gala, A Fine Feathered Fête*, where over 400 guests explored the Philip Trammell Shutze's Goodrum House while enjoying fine food and lively music.

HAY HOUSE

During the 2009-10 year, Hay House, The Georgia Trust's National Historic Landmark in Macon, researched and prepared for the restoration of the Dining and

the furnishings and finishes of both of these important rooms on the Main Level. Restoration for both rooms is slated for completion in early 2011.

Under the leadership of Bert Maxwell IV, Chair of the Board of Trustees for Hay House, education programs remained a top priority. Over 15,000 visitors participated in guided tours. Hay House strives to be as accommodating as possible to visitors, and in the past year we provided interpreters for German and Italian guests, offered written tours in French and Chinese, as well as restoration-themed tours for architecture students at Georgia Tech and historic preservation students at SCAD and UGA. For families with children, two Hay Days on Saturdays were offered as free, educational events for approximately 1,500 guests. Hay Days ensure that everyone in the community has an opportunity to see the restoration efforts and experience special exhibits, tours, take-home crafts, living historians, and live music or dance performances. The "Water, Lights and Ice Hay Day" included an in-depth look at the inner workings of the house, including a trip to the cupola and the historic spring house, courtesy of Gilbert and Susan Bennett.



Wine connoisseur Judy Beardsall entertained guests at the home of James and Amanda Upshaw during a wine dinner to benefit Hay House.



Christmas Luncheons at Hay House offered guests a 3-course seated meal, self-guided tours of three levels of the house decorated for the holidays, live musical accompaniment, and a 20% discount in the museum store.

Special events provided opportunities for members of the community at-large to participate in activities that support the general operations of Hay House. The 16th annual *Macon Gardens, Mansions & Moonlight*, chaired by Heidi Ream, featured Central Georgia's finest home and garden tours, along with free Gardening Seminars and a free Garden Market on the front lawn. A favorite with over 250 locals is the *Seasons of the Vineyard Wine Tasting & Auction* that features wine distributors' samples of red and white wines with an auction of celebrity chef dinners and vacation homes. *Christmas at Hay House*, chaired by Jim Barfield, featured natural greenery within the theme of 'Deck the Halls.'

Of special note, James and Amanda Upshaw and Internal Medicine Associates sponsored a wine tasting dinner in their home to benefit Hay House. With renowned wine connoisseur Judy Beardsall, the event was a highlight of the year. Hay House is also the preferred venue for brides and grooms on their special day. None of these programs would be possible without the steady support of Patrons and Corporate Sponsors, as well as volunteers such as the homeowners for the garden tour in the spring, who so generously keep Hay House alive. Thank you to everyone who contributed toward such a successful year!

CONTRIBUTORS

The Georgia Trust for Historic Preservation would like to express its appreciation to the following individuals, organizations, foundations, corporations and government agencies that have so generously supported its work during fiscal year 2010. The Georgia Trust thanks you for helping to make this year an outstanding success, and pledges to continue to work to advance our shared preservation goals.

This list reflects members and contributors who gave between April 1, 2009 and March 31, 2010. We sincerely apologize for any errors or omissions. Please contact the Trust with any corrections.

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FINANCIAL STATEMENT

Year Ended March 31, 2010

Revenue		Expenses	
State contracts	\$49,000	<i>Support services</i>	
Fundraising and grants	521,058	General and administrative	191,401
Capital Campaign for Hay House	8,615	Membership	55,585
Investment income ⁽¹⁾	1,131,924	Fundraising	113,382
Sale of revolving fund property, net of cost of \$125,540	(84,580)	Special events	147,006
Membership	330,872	<i>Programs</i>	
Memorials and endowment donations	4,500	Educational & technical assistance	234,821
Miscellaneous	78,385	Hay House operating	335,378
Properties rental	130,060	Hay House restoration	128,826
Saleable items	20,257	Heritage education	13,079
Special events	364,694	Main Street	57,425
Tours and meetings	97,898	Property management	26,803
Visitors	54,214	Revolving Fund operating	47,537
		Revolving Fund property	21,251
Total Revenue	2,706,897	Rhodes Hall operating	94,874
		Rhodes Hall restoration	18,659
		Scholarships	12,684
		Tours and meetings	89,406
		Bankshaven	97
		Total Expenses	\$1,588,214

(1) Includes realized gains/losses and change in unrealized gains/losses on investments of \$1,034,274.

BALANCE SHEET

March 31, 2010

Current Assets		Current Liabilities	
Cash and cash equivalents	\$1,301,355	Accounts payable and accrued liabilities	\$48,797
Pledges and grants receivable	396,549	Payroll and related taxes payable	31,055
Accrued interest receivable	18,239	Deferred income	47,893
Other receivables	36,282	Property rental deposits	55,937
Investments at fair value	1,489,833	Renovation Funds - Fort Benning Project	298,348
Revolving fund properties for sale	30,473	Renovation Funds - Georgia Theatre	2,819
Other assets	38,098		
Total Current Assets	\$3,310,829	Total Current Liabilities	\$484,849
Other Assets		Net Assets	
Cash and cash equivalents	–	<i>Unrestricted net assets</i>	
–restricted for long term use		Board designated for Statewide Office	1,407,050
Investments at fair value	2,891,748	Board designated for Hay House	494,688
–restricted for long term use		Undesignated	3,035,164
Pledges receivable	78,338		
–net of current portion			\$4,936,902
Total Other Assets	\$2,970,086	<i>Temporarily restricted net assets</i>	
		Statewide Office	698,701
		Hay House	1,937,357
			2,636,058
Property and Equipment		<i>Permanently restricted net assets</i>	
Land	280,500	Statewide Office	730,665
Buildings and leasehold improvements	5,328,646	Hay House	1,787,938
Furniture and equipment	378,532		
	5,987,678		2,518,603
Accumulated depreciation	(1,692,181)	Total Net Assets	\$10,091,563
Total Property and Equipment	\$4,295,497	Total Liabilities and Net Assets	\$10,576,412
Total Assets	\$10,576,412		

Financial information is taken from the financial statement audited by Lamb & Braswell, LLC. A complete copy of the 2010 audited statement is available upon written request to The Georgia Trust for Historic Preservation, 1516 Peachtree Street, NW, Atlanta, GA 30309-2908.



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