

2011 ANNUAL REPORT





Reclaiming, Restoring, Revitalizing Georgia

A YEAR IN REVIEW

Fiscal year 2011: April 1, 2010 – March 31, 2011

2011

was a transformative year for The Georgia Trust. Due to the hard-working and energetic Board of Trustees, committees and staff of the

Trust, we closed our fiscal year on March 31, 2011, with a budget surplus. This positive result was achieved at both the statewide office in Atlanta and at Hay House in Macon, 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 last year's Chairman of the Board of Trustees, Mr. Kimbrough Taylor. Since his election, Mr. Taylor dramatically increased the engagement of our Trustees by increasing policy discussions by the Board and by enhancing the level of involvement with his inspirational leadership. The Trustees 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 Diane Lewis, Tom Wight, Bonnie Dowling, Katey Brown, and others also made a tremendous impact. The staff of The Georgia Trust are due special recognition this year. They worked together as a cohesive team, which translated directly into a more effective, efficient operation.

Nathaniel Hansford
Chairman

Mark C. McDonald
President & CEO



PRESERVATION ASSISTANCE

This year the Georgia Trust for Historic Preservation provided preservation assistance to more than 110 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, by aiding individuals directly or referring them to others who can offer further assistance. Common preservation assistance topics include tax incentives, available grant money, lists of consultants, local historic district information, best practices for historic preservation projects, protecting properties with conservation easements, and properties included in the National Register of Historic Places.

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 FY2011, The Georgia Trust managed grant money allocated for the rehabilitation expenses associated with two projects in Georgia, Patton's Roundhouse located on Fort Benning in Columbus and the Little Cumberland Island Lighthouse on Little Cumberland Island. The Georgia Trust also partnered with the Georgia Theatre in Athens to establish the Georgia Theatre Rehabilitation Fund following the historic theater's devastating fire in June 2009. During Fiscal Year 2011, The Georgia Trust managed more than \$56,000 of donations and paid over \$31,000 in rehabilitation invoices for the theater.



Over **\$240,000** has been raised through the Trust's **Georgia Theatre Rehabilitation Fund**. The historic theater in Athens reopened in August 2011.



Ardath and Bill Underwood



Grace Quinn, Betsy Robbins

Over 2,000 teachers in 61 school systems have brought heritage education to their students through the Trust's *Talking Walls* program.



Wal-Mart donated three historic houses in Forsyth to the Trust in November 2010.

PARTNERS IN THE FIELD

The *Partners in the Field* program, launched in 2008, is a partnership with the National Trust for Historic Preservation to provide preservation services for the *Places in Peril* program, as well as offer general preservation services throughout the state.

We brought ten more sites into the program in 2011. Each site brings the opportunity to build local partnerships while working toward a feasible outcome that transforms significant historic places and their communities. One of this year's significant saves was the Capricorn Recording Studios in downtown Macon; it has been acquired by NewTown Macon which is working with the Trust to plan a capital campaign and restoration program.

Another success story comes from a site placed on the Trust's first list of *Places in Peril* in 2006. Built in 1936, the Old Hawkinsville High School served as a neighborhood school for Pulaski County until 1976, after which it was used by the county's board of education. After being placed on the Trust's *Places in Peril* list, the successful rehabilitation of the building progressed in phases and was guided by a partnership of architects, preservation planners and historians. The Trust awarded Old Hawkinsville High School a Preservation Award for Excellence in Rehabilitation in the spring of 2011.

MAIN STREET DESIGN ASSISTANCE

The Trust's *Main Street Design Assistance* (MSDA) program operates in partnership with Georgia's Department of Community Affairs. From a design office in Athens, staff has access to University of Georgia historical resources and graduate student design assistants. The program continued to provide valuable guidance to downtown development efforts in Georgia communities during the year. MSDA manager Evan Thibeault oversaw 21 design projects for 18 cities, spanning the state from Trenton to St. Marys. Most of these projects involved historic commercial buildings.

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. During the 2011 fiscal year, The Georgia Trust accepted the donation of four properties to its *Revolving Fund*: the Miller, Kyte and Pace Houses in Forsyth, and the Sayre-Alford House in Sparta. In addition to these four properties, The Georgia Trust marketed the West Jefferson St. Cottage in Madison, Cherry Cottage in Washington, and the Rossiter-Little House in Sparta. In March 2010, The Georgia Trust sold the West Jefferson St. Cottage in Madison, and this property is currently being rehabilitated.

The Georgia Trust's *Easements* program offers historic property owners the opportunity to ensure the future care for the historic integrity of a property through the charitable donation of a conservation easement. The process of the easement donation pro-

vides an economic, as well as preservation, incentive. 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 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 spring of 2011.

TALKING WALLS

Talking Walls, The Georgia Trust's heritage education program, encourages and supports local historical societies and preservation non-profit organizations to 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 a 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 summer 2010, The Georgia Trust supported four *Talking Walls* workshops throughout Georgia. Workshops were facilitated by staff at Hay House, DeKalb History Center, Thomasville Landmarks, and Cobb Landmarks and Historical Society. These workshops were attended by 55 teachers and education professionals from across the state. The Georgia Trust would like to express its gratitude to the Williams Foundation for its continued support of our heritage education programs, and the hard work and dedication of each *Talking Walls* facilitator and participant.

RHODES HALL

After years of discussion, The Georgia Trust signed a new 50-year lease with the State of Georgia for the continued stewardship of Rhodes Hall, a 1904 Atlanta landmark and the headquarters of the Trust. The Sustainability Task Force saw progress on two fronts. Southface, Inc. performed a "green audit" on Rhodes Hall to determine the best way to improve its energy efficiency without sacrificing historic fabric. Marketing studies were completed to determine the feasibility of a certification process for the rehabilitation of historic buildings that will be undertaken in accordance with green building principles.

GEORGIA TRUST SPECIAL EVENTS

Thanks to the creativity and hard work of Georgia Trust volunteers and staff, several memorable member events achieved significant success this year. The *Preservation Gala*, "A Neo-Classical Caper," was held at the elegant home of Mr. and Mrs. Jack Markwalter and raised over \$105,000. The Rambles held in Atlanta and Macon during FY2011 showcased the remarkable preservation efforts in these cities. The *Uptown Rhodes Race* and *Santa at Rhodes Hall* also achieved financial success while highlighting the mission of our organization.



Elizabeth DuBose, Duffie DuBose, Dean DuBose Smith



Mose Bond, Janice Biggers, Teri Bond



Antonia and Wright Mitchell



Florence Callaway Holmes, Georgia Schley Ritchie



HAY HOUSE

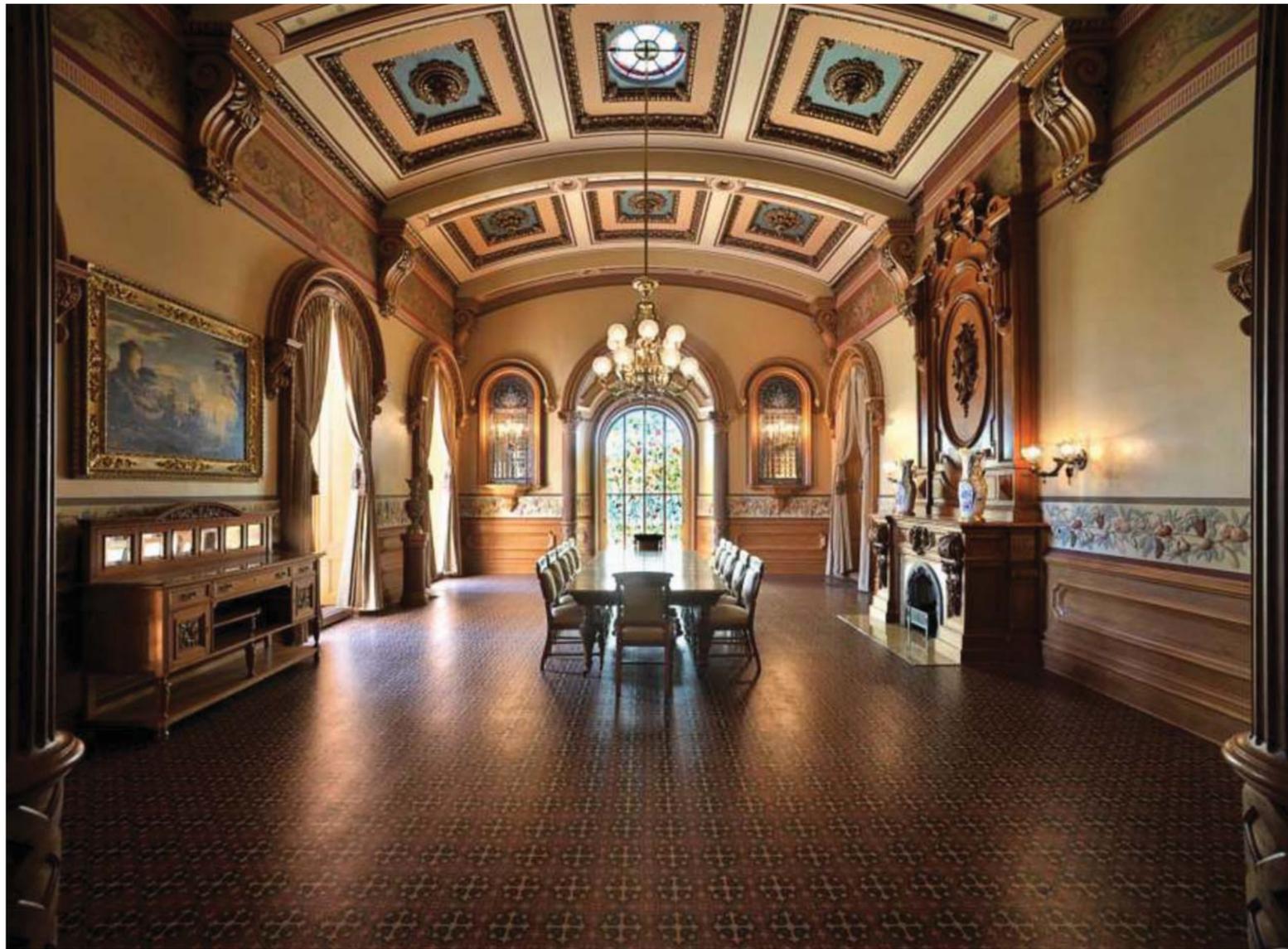
Fiscal Year 2011 proved to be another successful year at Hay House, The Georgia Trust's National Historic Landmark in Macon. Under the leadership of the Hay House's Restoration Committee, led by Bonnie C. Dowling, the dining room restoration was completed, restoring it to its appearance during the Johnston era (1860-1890). Through the committee's efforts and painstaking attention to detail, the space is now a magnificent example of the décor and grandeur of the period. The committee's efforts on the dining room restoration were recognized by the Historic Macon Foundation through the receipt of a 2011 Preservation Award.

Under the leadership of Heidi Ream, Chair of the Board of Trustees for Hay House, education programs remained a top priority. Over 20,000 visitors participated in guided tours, programs, and events, such as the bi-annual *Hay Day* program, which ensures that everyone in the community can experience the thrill of visiting the house and experience a day full of crafts, exhibits, and living history demonstrations. International visitation also remained strong, despite the ongoing weak economy, and the museum supported tours for preservation and architectural students for SCAD, Georgia Tech, and the University of Georgia.

Special events, such as the annual *Macon Gardens, Mansions & Moonlight*, chaired by Tyler Garland, featured tours of Central Georgia's finest gardens and area historic homes, along with workshops on gardening. A favorite with over 250 locals is the *Seasons of the Vineyard Wine Tasting & Auction*, which 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 Chris Howard, was also well received by the community and featured a wide variety of beautiful arrangements and authentic Victorian décor.

Hay House continued to be Middle Georgia's preferred venue for weddings and other events and none of our accomplishments would be possible without the support of our patrons, corporate sponsors, and volunteers. Thanks to everyone who contributed to another successful year!

The Living Room was restored to the late Hay era (1926-62); the original peach wallpaper has been reproduced and the room's furniture has been conserved and upholstered with period fabrics.



The Dining Room was brought back to its original splendor, with its historic multi-color scheme, lively floorcloth, and original chandelier which was returned to the house after decades of absence.



Over 20,000 people visited Hay House in 2011.



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 2011. 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, 2010 and March 31, 2011. We sincerely apologize for any errors or omissions. Please contact the Trust with any corrections.

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BONNIE DOWLING
Bonnie Dowling Interiors
Macon



Bonnie Dowling's volunteering spans more than 30 years. Most recently she has led the extensive restoration efforts at Hay House.

"I support The Georgia Trust for Historic Preservation because the Trust recognizes what an asset and treasure historic buildings like the Johnston-Felton-Hay House are to our communities."

Mr. and Mrs. John F. Willingham
Richard Wilson and Mickey Betts

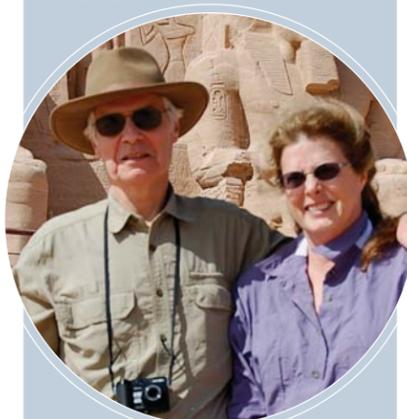
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Senior Counsel
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Atlanta



Kim Taylor (pictured with his wife Triska Drake) served as Chairman of the Board of Trustees of The Georgia Trust from 2009-2011. He established the Trust's Sustainability Task Force and led the organization to two very successful years.

“Preserving structures is one of the most important contributions to environmental stability... I am hopeful that the connection between historic preservation and environmental sustainability will come to be fully realized and appreciated, and I hope to contribute to that important effort.”

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 Waites & Foshee Insurance Group
 Wells Fargo Insurance Services
 The Virgil P. Warren Family Foundation

\$1,000–\$2,499

Ace Hardware - Macon
 Alvin Moore Event Design Services
 American Pride Bank
 Atlanta Intown
 The Beverly H. Bremer
 Charitable Lead Unitrust
 Ron and Lisa Brill Charitable Trust
 Brooks-Berry-Hayne & Associates
 Burglar Alarm Products
 Butler Automotive Group
 C. W. Matthews Contracting Company, Inc.
 CLC Foundation Inc.
 Capital City Bank
 Chubb Federal Insurance Companies
 Coca-Cola Enterprises
 Coca-Cola Company Matching Gifts
 The Colonial Dames of America,
 Chapter XXIV - Atlanta
 The George E. Crouch Foundation
 Diane Kirkland Photography
 Drew Eckl & Farnham
 Fox Theatre Institute
 G. Gilbert Inc
 GEICO Direct
 Georgia Power - Macon
 Gunnin Graphics
 Hatcher, Stubbs, Land, Hollis & Rothschild
 Jacquelynn P. Lanham Designs, Inc.
 Lamb & Braswell, LLC
 Thomas H. Lanier Foundation
 Macon Arts Alliance

McNair, McLemore, Middlebrooks & Co.,
 LLP
 Morgan Keegan – Willett Group
 Open MRI of Macon
 Patton, Albertson & Miller, LLC
 Peachtree Circle Shell
 R.E.M. / Athens, LLC
 SCANA Energy
 Sherwood Forest Garden Club
 Spa Medical & Vein
 Specialist of the South, LLC
 Stifel Nicolaus & Co.
 SunTrust Bank, Middle Georgia
 T. Lake Environmental Design
 Vulcan Materials Company
 Wachovia Wells Fargo Foundation
 Whole Foods Market
 Winston Foundation

\$500–\$999

The Adler Family Foundation, Inc.
 Affairs to Remember
 A.T. Long & Son
 Atlanta Humane Society
 Bold American Catering
 Callaway Blue
 Coldwell Banker Commercial
 - Eberhardt & Barry, Inc.
 Conditioned Air, Inc.
 Equifax
 Hays Service, LLC
 Howard, Moore & McDuffie, PC
 Imedia Group
 Joli Kobe Café and Bakery
 Low Country Barbeque
 McKenna Long & Aldridge LLP
 Midtown Blue
 Minuteman Press
 Murphy's
 Phidippides
 Planet Smoothie
 The Ritz Carlton, Atlanta
 Rosebud Company
 S & S Cafeterias
 Santa In Atlanta
 Starr Electric Company, Inc.

\$350–\$499

Decatur Downtown Development

Historic Linwood Foundation, Inc.
 IBM Corporate Matching Grants Program
 International Fine Art Conservation Studios
 Sandra Collins-Rowland / Panaprint
 Structor Group

\$225–\$349

Alston and Bird
 Atlanta Preservation Center
 Brady Inn Bed & Breakfast
 Event Rentals Unlimited
 Georgia Realty Sales
 Graves Foundation
 Golden Coast Publishing Company
 New South Associates

Patricia McClean Interiors Inc.
 Prudential Foundation Matching Gifts
 Revival Construction
 Sedgefield Properties
 Willett Energy Company

The P.L. Hay Order of the Keystone Society Planned Giving Circle of The Georgia Trust

Mr. and Mrs. William H. Anderson II
 Virgil E. Cooper, Jr.
 Mr. and Mrs. W. M. Dickey
 Bonnie C. Dowling
 Mr. and Mrs. W. Bradley Hale (deceased),
 Mr. and Mrs. F. Sheffield Hale,
 and Mr. and Mrs. Raymond A. Jones III
 Suzanne Jones Harper
 C. Terry Holland
 Ms. Lee A. Johnson
 Mr. and Mrs. William M. Matthews
 Robert A. McCord III (deceased)
 and Carolyn McCord Anderson
 Ben (deceased) and Hazel Porter
 John F. Rogers, Jr.
 Mr. Tom B. Wight

The Keystone Society of The Georgia Trust

Anonymous
 Anonymous
 Mrs. Bobby W. Alford (deceased)
 Mr. William N. Banks
 Mr. and Mrs. W. Moses Bond
 Mr. David Richmond Byers III (deceased)
 Mr. John H. Cheatham, Jr. (deceased)
 Mrs. Anne Moore Colgin (deceased)
 Mrs. Beverly M. DuBose, Jr.
 Victoria Ober and William E. Farnell, Jr.
 (deceased)
 Ms. Dorothy Tarpley Holmes (deceased)
 Mrs. Treville Lawrence
 Mr. Roy W. Mann, Jr. (deceased)
 Mr. John M. Rittelmeyer, Jr.
 Ms. Frances Schultz
 Mr. and Mrs. Charles G. Spalding
 Mrs. Emily Tichenor (deceased)
 Ardath S. and William T. Underwood
 Ms. Georgiana Warren (deceased)
 Mrs. Thomas L. (Marguerite N.) Williams, Jr.
 (deceased)

TRUSTPEOPLE

TIFFANY BURCKHALTER-ALEWINE
 Del Webb Georgia
 Flowery Branch



For the past three years, Tiffany has cheerfully greeted visitors, conducted tours, and helped out at Rhodes Hall in any way she possibly can.

“Historic homes have a story to tell, and I feel it’s important to pass the story along for all generations to enjoy and encourage future generations to continue the preservation of Georgia’s historic treasures.”

2011 annual report

FINANCIAL STATEMENT

Year Ended March 31, 2011

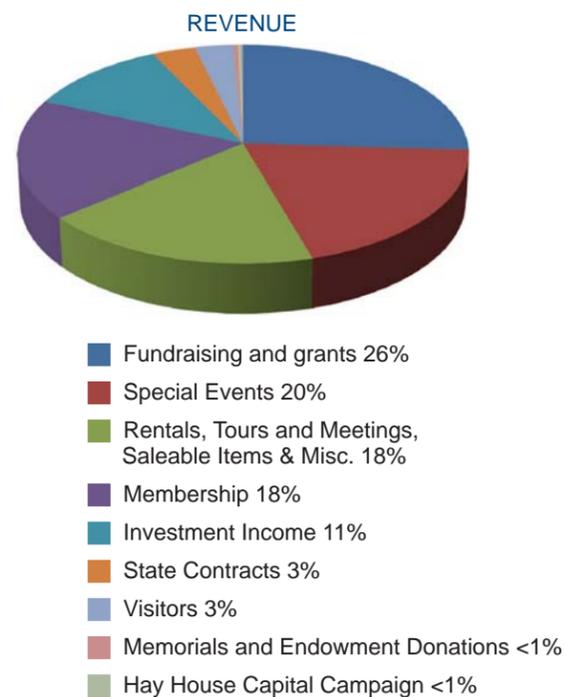
Revenue

State contracts	\$53,900
Fundraising and grants	408,330
Capital Campaign for Hay House	3,407
Investment income ⁽¹⁾	176,418
Sale of revolving fund property, net of cost of \$125,540	(2,541)
Membership	278,794
Memorials and endowment donations	6,525
Miscellaneous	50,998
Properties rental	143,147
Saleable items	20,207
Special events	306,602
Tours and meetings	75,410
Visitors	46,796
Total Revenue	1,567,993

Expenses

<i>Support services</i>	
General and administrative	182,479
Membership	67,483
Fundraising	97,474
Special events	120,607
<i>Programs</i>	
Educational & technical assistance	185,063
Hay House operating	358,125
Hay House restoration	279,447
Heritage education	11,648
Main Street	58,630
Property management	24,854
Revolving Fund operating	57,832
Revolving Fund property	24,474
Rhodes Hall operating	77,409
Rhodes Hall restoration	2,256
Scholarships	15,426
Tours and meetings	71,861
Bankshaven	985

Total Expenses \$1,636,053



BALANCE SHEET

March 31, 2011

Current Assets

Cash and cash equivalents	\$1,118,977
Pledges and grants receivable	152,392
Accrued interest receivable	16,315
Other receivables	24,527
Investments at fair value	1,543,705
Revolving fund properties for sale	195,000
Other assets	64,409
Total Current Assets	\$3,115,325

Other Assets

Investments at fair value –restricted for long term use	2,777,613
Pledges receivable –net of current portion	50,775
Collections (Note 1)	–
Total Other Assets	\$2,828,388

Property and Equipment

Land	280,500
Buildings and leasehold improvements	5,544,543
Furniture and equipment	406,062
	6,231,105
Accumulated depreciation	(1,816,513)
Total Property and Equipment	\$4,414,592

Total Assets \$10,358,305

Current Liabilities

Accounts payable and accrued liabilities	\$88,664
Payroll and related taxes payable	42,581
Deferred income	89,062
Property rental deposits	38,650
Renovation Funds - Fort Benning Project	72,040
Renovation Funds - Other	3,805
Total Current Liabilities	\$334,802

Net Assets

<i>Unrestricted net assets</i>	
Board designated for Statewide Office	1,165,845
Board designated for Hay House	536,238
Undesignated	3,729,763
	\$5,431,846

Temporarily restricted net assets

Statewide Office	515,417
Hay House	1,557,537
	2,072,954

Permanently restricted net assets

Statewide Office	730,665
Hay House	1,788,038
	2,518,703

Total Net Assets \$10,023,503

Total Liabilities and Net Assets \$10,358,305

Financial information is taken from the financial statement audited by Lamb & Braswell, LLC. A complete copy of the 2011 audited statement is available upon written request to The Georgia Trust for Historic Preservation, 1516 Peachtree Street, NW, Atlanta, GA 30309-2908.

(1) Includes realized gains/losses and change in unrealized gains/losses on investments of \$56,380.

2011 annual report



**THE
GEORGIA
TRUST**

RECLAIM • RESTORE • REVITALIZE