

THE GEORGIA TRUST FOR HISTORIC PRESERVATION



**THE
GEORGIA
TRUST**

RECLAIM • RESTORE • REVITALIZE

ANNUAL REPORT
Fiscal Year 2009

A Year in Review

Fiscal year 2009: April 1, 2008 – March 31, 2009

2009 was a challenging time for preservation, non-profits and the nation in general. However, even in a declining economy, preserving our built environment was of great importance because it not only provided opportunities for revitalizing communities but also to honor our heritage – where we came from, where we have been, and what we can look forward to.

– *We are recovering.*

The Georgia Trust acknowledges and greatly appreciates our loyal membership.

Preservation Assistance

This year, The Georgia Trust for Historic Preservation provided preservation assistance to nearly 200 individuals seeking information and advice on what they can do to protect and revitalize historic buildings, structures and sites in their communities. Preservation inquiries cover a wide variety of topics, which we address to the best of our knowledge, through direct assistance and/or by referring 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 the National Register of Historic Places.

Preservation Partners

This year, The Georgia Trust created a new program called *Preservation Partners*. The *Preservation Partners* program is designed as a way for The Georgia Trust to be involved with groups embarking on preservation projects with limited preservation experience. The Georgia Trust's role 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. One such *Preservation Partnership* project is Patton's Roundhouse located on Fort Benning in Columbus. Through this partnership, The Georgia Trust manages grant money allocated for the rehabilitation of an important military structure once used by General George S. Patton.

Partners in the Field

The *Partners in the Field* program is designed to improve and expand the Trust's existing *Places in Peril* program, an annual list of the ten most endangered historic sites in Georgia. Working with each site listed as a 2009 *Place in Peril*, The Georgia Trust has been a facilitator between other preservation organizations, local groups, property owners and interested parties. The Georgia Trust worked with these entities to identify and prioritize each site's preservation needs. We developed spotlight events, which have proven to be an important tool to educate and to involve the local community.

In addition, each 2009 *Places in Peril* site had the opportunity to submit an application for a matching grant in an amount up to \$10,000. The Georgia Trust announced the grant program in November 2008, with applications due in March 2009. Applications were sent to all parties involved in the preservation/restoration project, not just the nominator.

The deadline provided motivation for several sites to step up their organizational efforts.

The Georgia Trust received four grant applications from the 2009 *Places in Peril* sites. The remaining six did not submit an application because the community was not at the stage to identify the proper catalyst project or lacked adequate local support to see the project through. The total grant disbursement for the first year was \$42,000. The recipients were Bibb Mill (Columbus), Fort Daniel (Dacula), Mary Ray Memorial School (outside Newnan), and the Sallie Ellis Davis House (Milledgeville). The grant funds awarded are being used for projects with tangible results. All grant projects are to be completed by March 2010.

Beyond the ten *Places in Peril* sites, in-depth preservation assistance was provided to four other historic properties. During the last year, the four Georgia sites that received in-depth preservation assistance were Linwood Cemetery (Macon), Bibb County Courthouse (Macon), the Converse-Dalton-Ferrell House (Valdosta), and the Grooverville Baptist Church (Brooks County). The level and type of assistance varied. For example, Linwood Cemetery received substantial assistance with an educational session on February 7, 2009. This event, co-hosted by The Georgia Trust and the Macon Cemetery Preservation Corporation, brought statewide public awareness to this significant site. As the result of The Georgia Trust's media release and e-blast, a statewide travel guide created a feature story on Historic Linwood Cemetery for its 2009 fall publication. The community project has received an outpouring of volunteers that continue to clear and maintain the cemetery. The Field Services Manager continues to provide follow-up preservation assistance to all four sites as necessary.

In order to reach a significant statewide audience, The Georgia Trust publicly promoted the *Partners in the Field* initiative and the expanded *Places in Peril* program through various communication outlets. The Georgia Trust hosted a reception at Rhodes Hall in Atlanta, attended by over 70 people, to announce the 2009 *Places in Peril* designees on October 28, 2008. Since then The Georgia Trust has sent 15 e-blasts and eight press releases featuring information about upcoming events and program accomplishments related to *Partners in the Field*. *The Rambler*, The Georgia Trust's quarterly publication, featured the program as its cover story in the fall 2008 issue, and has included articles on the program in each issue since the announcement. There has also been a significant effort to promote the *Partners in the Field* initiative through online and web-based resources. Our newly redesigned webpage features the *Partners in the Field* program prominently.

The local level is often the most important aspect of our preservation initiative. With strong cooperation from local partners, The Georgia Trust has been able to utilize a strong awareness campaigns to reach beyond the demographics of



The Mary Ray Memorial School in Coweta County was a recipient of one of the grants given to the 2009 Places in Peril sites.



The Converse-Dalton-Ferrell House in Valdosta received preservation assistance in the form of a maintenance plan, which addresses a planned maintenance schedule for the next 20 years.

the local organizations. The Georgia Trust has also been able to employ a consortium of preservation experts for technical advice to assist local organizations. An example is our work with historic Fort Daniel, a 2009 *Places in Peril* designee. The Gwinnett Archaeological Society and the Friends of Fort Daniel worked with The Georgia Trust to lobby the Gwinnett County Government to purchase the archaeological site. These efforts were unsuccessful due to the economic climate, but the two organizations have collaborated to create a tax exempt foundation to accept donations toward the private purchase of the site. In addition, through the matching grants program, The Georgia Trust funded the development of site plans for the archaeological park. The park being proposed is a new concept for archaeology in the Southeast, and the site plans will assist with raising funds in the future.

Main Street Design Assistance

The Trust's Main Street Design Assistance program (MSDA), a partnership with Georgia's Department of Community Affairs, provided valuable guidance to downtown development efforts in Georgia communities during FY 2009. The MSDA program oversaw 28 design projects for 19 cities. The proposed designs varied from historically appropriate façade renovations and new infill construction, to a farmer's market, parking layouts, wayfinding signage and gateway monuments.



Close-up of a proposed facade renovation in downtown Americus

The MSDA program also continued its "Old Downtown Image Search" (ODIS), an historic photo identification and acquisition program started in FY 2008. A dedicated intern scanned and cataloged hundreds of photos, some from site visits to community archives and others sent in by helpful local representatives. In early 2009 the whole MSDA team spent days scanning old postcards and archival photos in UGA's Hargrett rare book and manuscript library, having reached an agreement with the library's directors to share these new high-resolution scans between both organizations. Historic photos of Georgia's downtown buildings often mean the difference between conjecture and proof, when it comes to determining the form of missing architectural elements. The

ODIS archives are now part of the ever-growing suite of tools MSDA designers can use to create well informed proposals for their clients.

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 2009 fiscal year, The Georgia Trust marketed five endangered properties through its revolving fund, one of which sold and is being rehabilitated for use as office space.

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 owners to maintain the condition of the exterior while preserving its historic integrity. All easements held by the 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

Trust inspected 33 easement properties from across the state during the spring of 2009.

Talking Walls

Talking Walls, The Georgia Trust's heritage education program, supports week-long summer workshops offering educators all over the state of Georgia continuing education credits. Through The Georgia Trust, local historical societies and preservation non-profit organizations serve as facilitators for these workshops that are designed to train educators on using historic resources such as maps, buildings, photographs and oral histories as teaching aids in their lesson plans. During the summer of 2008, 20 teachers participated in Thomasville Landmark's workshop, and 26 attended the workshop conducted by Cobb Landmarks. As a result of the 2008 programs, an estimated 1,150 students have been enriched by the efforts of the teachers involved in *Talking Walls*.

Since 1991, *Talking Walls* has trained nearly 2,050 teachers in 61 different school systems in 51 counties across the state. More than 400,000 students have been reached as a result of The Georgia Trust's heritage education program, and new generations are becoming excited about the local, state and national history right in their own backyards.

GaPA

Georgians for Preservation Action (GaPA) is the 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.

This past fiscal year, GaPA supported funding for historic preservation efforts and advocated for funding of Georgia's historic cultural resources and the Georgia Historic Preservation Division's archaeology department.

Rhodes Hall

The Georgia Trust introduced two new fundraising events that took place at Rhodes Hall: *Cupid at the Castle* and *Classics at the Castle*.

On Valentine's Day, couples created their own history, when Chaplain Jeremiah O'Keefe-West performed weddings, commitment ceremonies and vow renewals at Rhodes Hall, with all donations going to the Trust. Rhodes Hall provided a beautiful and memorable setting for couples who were looking for an



The Georgia Trust launched its *Classics at the Castle* program in February 2009 with a performance by renowned violist Robert McDuffie.



The Cowen House was stabilized by the Trust (shown above) and sold in March 2009. It is currently being rehabilitated into office space.



elegant but inexpensive wedding.

The Trust also introduced *Classics at the Castle*, benefit concerts featuring classical music artists. The introductory event featured internationally renowned violinist Robert McDuffie, who has appeared as soloist with most of the major orchestras of the world.

Over the past year, the State of Georgia continued making improvements to Rhodes Hall with the installation of a handicap-accessible elevator and entrance in compliance with the American Disability Act (ADA). Construction of an ADA restroom was also completed.

Hay House

Hay House, The Georgia Trust's historic house museum in Macon, experienced a stellar year for both restoration and special events. The Trust is proud that the restoration of the ground level has been mostly completed. A \$7.1 million



Restoration is complete in Judge Felton's office. Currently it holds an exhibit displaying the restoration process.

capital campaign for restoration and endowment completed in 2007 has provided funding for the ground level projects, as well as means to seal the exterior and address drainage and moisture issues and restore the cupola. While Capital Campaign funds will also be used to restore the main level (including the living room and dining room), restoration of the ground level flooring and decorative finishes provided a solid foundation for future projects. The Johnstons and Feltons used the ground level as both servants' work areas and summer living quarters because the air temperature was much cooler downstairs than it was on the upper floors. Considering that these rooms were rarely if ever viewed by guests, visitors can marvel at the fact that decorative finishes were not spared. Ornate plasterwork, custom cabinetry, wood graining, and faux finishes similar to more public rooms of the house are now beautifully

restored on the lower level. Summer living areas included a summer dining room (now the Museum Store), summer bedroom (now staff offices), and a combined summer bedroom and law study (now the Exhibit Hall).



Garden Market at Macon Gardens Mansions & Moonlight

Special events provide vital operating support to keep the doors open for the 15,791 people who visited Hay House this fiscal year. The ever popular *Macon Gardens Mansions & Moonlight* was named a Top 20 Event by the Southeast Tourism Society. With a major marketing grant from the Georgia Department of Economic Development, this event drew participants from 11 states for Secret Garden Tours, Historic Home Tours, a Moonlight Tour, and free Seminars and a Garden Market. *Christmas at Hay House 2008* featured a decoration theme of "The Twelve Days of Christmas," and a full season of events. The *Seasons of the Vineyard Wine Tasting Auction* held in November featured several wine distributors. Each of these events was possible due to the hard work and contributions of our active Board of Trustees and Advisors. 

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 2009. 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, 2008 and March 31, 2009. We sincerely apologize for any errors or omissions. Please contact the Trust with any corrections.

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Listed below are individuals who gave a gift of \$350 or more between April 1, 2008 and March 31, 2009.

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Financial Statement

Year Ended March 31, 2009

Revenue		Expenses	
State contracts	\$74,000	<i>Support services</i>	
Fundraising and grants	390,049	General and administrative	303,258
Capital Campaign for Hay House	20,495	Membership	58,300
Investment income	(865,101)	Fundraising	133,431
Sale of revolving fund property, net of cost of \$324,734	(129,734)	Special events	27,733
Membership	307,186	<i>Programs</i>	
Memorials and endowment donations	2,205	Educational & technical assistance	222,407
Miscellaneous	61,343	Hay House operating	423,005
Properties rental	163,190	Hay House restoration	153,092
Saleable items	30,778	Heritage education	16,567
Special events	146,565	Main Street	72,060
Tours and meetings	108,169	Property Management	121,491
Visitors	60,516	Revolving Fund operating	28,931
		Revolving Fund property	16,836
Total Revenue	369,661	Rhodes Hall operating	169,976
		Rhodes Hall restoration	17,075
		Scholarships	8,792
		Tours and meetings	111,432
		Total Expenses	\$1,884,386

Note: Losses in the securities market and in real estate adversely affected The Georgia Trust revenue for fiscal year 2009 as shown in the amounts in parentheses. Since that time, The Georgia Trust and Hay House endowments have stabilized.

Balance Sheet

March 31, 2009

Current Assets		Current Liabilities	
Cash and cash equivalents	\$738,051	Accounts payable and accrued liabilities	\$45,529
Pledges and grants receivable	339,388	Payroll and related taxes payable	22,267
Accrued interest receivable	15,390	Deferred income	97,970
Other receivables	21,850	Property rental deposits	50,725
Investments at fair value	762,860	Renovation Funds - Fort Benning Project	323,321
Revolving fund properties for sale	125,540		
Other assets	68,195	Total Current Liabilities	\$533,130
Total Current Assets	\$2,071,274	<i>Net Assets</i>	
<i>Other Assets</i>		<i>Unrestricted net assets</i>	
Cash and cash equivalents	493,047	Board designated for Statewide Office	610,438
–restricted for long term use		Board designated for Hay House	-
Investments at fair value	2,588,503	Undesignated	2,822,900
–restricted for long term use			
Pledges receivable	3,414		\$3,433,338
–net of current portion		<i>Temporarily restricted net assets</i>	
Total Other Assets	\$3,084,964	Statewide Office	1,062,616
		Hay House	1,958,483
			3,021,099
<i>Property and Equipment</i>		<i>Permanently restricted net assets</i>	
Land	280,500	Statewide Office	730,665
Buildings and leasehold improvements	5,259,004	Hay House	1,787,778
Furniture and equipment	376,352		
	5,915,856		2,518,443
Accumulated depreciation	(1,566,084)	Total Net Assets	\$8,972,880
Total Property and Equipment	\$4,349,772		
		Total Liabilities and Net Assets	\$9,506,010
Total Assets	\$9,506,010		

Financial information is based on the audited financial statement prepared by Lamb & Braswell, LLC. A complete copy of the 2009 audited statement is available upon written request to The Georgia Trust for Historic Preservation, 1516 Peachtree Street, NW, Atlanta, GA 30309-2908.



THE GEORGIA TRUST

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