

2018

# ANNUAL REPORT

## FINANCIALS 2017-2018

### Statement of Activities

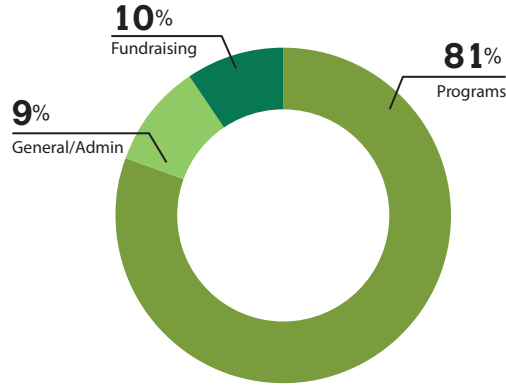
July 1, 2017 - June 30, 2018

#### Revenue and Support

Retail Operations	\$ 1,288,655
Rental Income	1,007,871
In-Kind Contributions	758,738
Contributions	422,850
Grants	343,228
Miscellaneous Income	101,827
Event Management Fee	42,387
Interest Income	471
<b>Total Revenue and Support</b>	<b>\$3,966,027</b>

#### Expenses

Program Expenses	3,346,735
General and Administrative	380,803
Fundraising	414,668
<b>Total Expenses</b>	<b>4,142,206</b>
Change in Net Assets	(176,179)
Net Assets at Beginning of Year	1,772,686
<b>Net Assets at End of Year</b>	<b>\$ 1,596,507</b>



### Expenses

### Statement of Financial Position

As of June 30, 2018

#### Assets

Current Assets	\$ 1,337,757
Property & Equipment	215,208
Other Assets	257,644
<b>Total Assets</b>	<b>\$ 1,810,609</b>

#### Liabilities & Net Assets

Current Liabilities	\$214,102
Unrestricted Net Assets	824,368
Temporarily Restricted Net Assets	772,139
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 1,810,609</b>

## BOARD OF TRUSTEES

### Officers

Joyce Gattas, PhD, Chair  
 Connie Matsui, Vice Chair  
 Gaidi Finnie, Secretary  
 Pemberton Smith, Treasurer  
 Carol Chang, Immediate Past Chair  
 Tomás Herrera-Mishler, President and Chief Executive Officer

### Board Members

Jonathan Bailey  
 Joye Blount  
 Gerard J. Buckley  
 Li-Rong Lilly Cheng, PhD  
 Roger Conlee  
 Pam Crooks  
 Jim Dawe  
 Emily Fox  
 Victoria Hamilton  
 Charles Hellerich  
 Conny Jamison  
 Katherine Johnston  
 David Kinney  
 Brian Matthews  
 Paul Meyer  
 Gonzalo Rojas  
 Glenn Rossman  
 Alan Spector, MD, PhD  
 John Venekamp  
 Michael Yee



### Best Urban Forestry Educational Project 2018

San Diego Regional Urban Forests Council (SDRUFCC)



### Certified Service Enterprise

After two years of effort by the Volunteer Engagement Task Force, the Balboa Park Conservancy was officially recognized by the Points of Light Foundation as a Certified Service Enterprise, reflecting our commitment to best practices in volunteer stewardship. December 2018



Advocates for the Greater Good of Balboa Park

The Balboa Park Conservancy provides expertise, advocacy and resources to envision, enhance and sustain Balboa Park for all visitors in partnership with the City of San Diego and in collaboration with other organizations in the Park and the community.

[balboaparkconservancy.org](http://balboaparkconservancy.org)



# KEY ACCOMPLISHMENTS

## DATA-DRIVEN PROJECTS

- Launched **Tree Balboa Park**, a two-year **\$750K initiative to establish 500 trees** in Balboa Park.
- Completed the first comprehensive **Tree Inventory for Balboa Park** since 1998, providing data via a GIS-based tree map tool.
- Completed phase one of the park's first **Cultural Landscape Report**.
- Completed a Signage Inventory, convened stakeholders and worked with experts to develop a **revised Signage & Wayfinding Plan** to enhance visitor accessibility
- Completed a **Balboa Park Benefits Study**—an economic impact report showing the comprehensive value of Balboa Park

## CREATIVE PLACEMAKING

- Collaborated with park stakeholders to expand and host **FREE community events for more than 300,000 visitors**: Food Truck Fridays, Halloween Family Day, Holiday Food Truck Festival, Cinco de Mayo, and Fiesta Botanica

## VISITOR EXPERIENCE

- Awarded an **AmeriCorps VIP Fellow** for volunteer coordination
- Launched two new **parkwide volunteer initiatives**: Park Ambassadors and Balboa Park Tree Stewards
- Served more than **515,000** visitors last year at the Balboa Park Visitors Center and expanded our tour services with trained volunteers to **support the Balboa Park Rangers**

# CONSERVATOR'S CIRCLE

We are grateful to the following individuals and organizations who invested in Balboa Park with a commitment to the Conservancy of \$1,000 or more, for a minimum of 5 years.

### BUILDERS

#### \$50,000+

Carol & Jeff Chang  
Pam Hamilton Lester  
Connie Matsui & Bill Beckman  
Marilyn Woods

### CULTIVATORS

#### \$25,000 - \$49,999

Charles & Lisa Hellerich  
Jo Ann Kilty  
Knight Angels  
McGrory Family Fund of the Jewish Community Foundation  
Lynne & Glenn Rossman

#### \$5,000 - \$24,999

Anonymous  
Accomplishment Coaching  
Claire Anderson  
Jonathan Bailey & Triton Klugh  
Sarah Beckman & Jarrod Schemenauer  
Stephanie Bergsma & Dwight Hare  
Susan & Richard Bezman  
Betsy & Edward Blodgett  
Terrance Bruggeman & Dianne Dyer Bruggeman  
Gerard Buckley  
Kay Chandler  
Claudia Chan-Shaffer & Jerry Shaffer  
Lilly Cheng  
Nicole & Ben Clay  
Pamela D. Crooks  
Mary & Jim Dawe  
Claudia & Michael Ehrenfeld

Ellis Family Foundation

Dan & Phyllis Epstein

Jim Farley

Nancy Farnan & Leif Fearn

Jean & Mark Fisher

Douglas Flaker & Richard Valdivia

Apua Garbutt & Dr. Mark Garbutt

Joyce Gattas, PhD

Gay & Lesbian Fund for San Diego 🌈

Joyce Glazer

Tomás & Mercedes Herrera-Mishler

Conny Jamison

Jay Jeffcoat

Katherine & Mark Johnston

KCM Group

Cheryl D. Kendrick

Gerald E. Kleinsmith & Gerald Michaud

James Lauer

Janet Lawless Christ & Charlie Christ

Michael & Teresa Lewis

Rita Lim-Wilby

Jaimi Lomas & Tom Haney

Betsy McCullough

Judy McDonald

Paul & Maggie Meyer

Rebecca & Mitch Mitchell

Mary-Rose & Bill Mueller

Nancy Carol Carter

Fern Nelson

Robert Nelson & Joan A. Fujisaki

Stephanie & Ron Oliver

Marjorie & Charles O'Malley

Cheryl Alethia Phelps

Danny Piper

Ferrell Reed

Ann & Tim Rice

Robert Cerasoli Family Trust

Clarisa & Gonzalo Rojas

Patricia Roscoe

Allison Rossett

Renato Salazar & Jonathan McMullen

Rana Sampson & Jerry Sanders

Clifford Schireson & John Venekamp

Shawn Schraeger & Cheri Fitzer

James G. Schwendig & Mike Bogue

Robert K. & Judy Sharp

Elaine & Peter Shaw

Marivi & Ruey Shivers

Jean & Pemberton Smith

Nancy & Alan Spector

Jeanette Stevens

Joe & Kym Szalkiewicz

Johanna & John Toman

Dawn Viveash

K. Nikki Waters

Bob Watkins

Sharon & David Wax

Janice Weinrick

Peter Wheeler

Bertha & Earl Wiens

Wilson Turner Kosmo LLP

Karin Winner

Michael & Criselda Yee

Sharon B. Zell

*List current as of 12/31/2018*

# DONORS

The following individuals and organizations generously supported the Balboa Park Conservancy with donations, grants, and pledges to support mission-driven initiatives for Balboa Park.

### \$100,000+

V. Susan Gephardt Endowment Fund 🌈

### \$50,000 - \$99,999

Anonymous  
The Favrot Fund  
Connie Matsui & Bill Beckman

### \$25,000 - \$49,999

Conny Jamison  
SDG&E

### \$10,000 - \$24,999

County of San Diego  
David C. Copley Foundation  
Joyce Axelrod & Joe Fisch  
Clifford Schireson & John Venekamp

### \$5,000 - \$9,999

Beyster Family Foundation  
Cohn Restaurant Group  
Cubic Corporation  
Arthur Q. Johnson Foundation  
Nancy & Alan Spector  
Ted & Kat Steuer

### \$1,000 - \$4,999

Anonymous  
Absolutely Electric  
Mike & Dede Alpert  
Art Pratt Foundation/  
Old Mission Rotary  
Diane and Dick Beckman  
Marsha A. Bedwell  
Darcy & Robert Bingham  
Laurie Black  
Beth Branning  
Deborah Calhoun  
Steve Cologne/  
Higgs, Fletcher & Mack  
Ashley Copp

COX Communications

Martin Dickinson

Sr. Raymonda DuVall

Ann Parode Dynes

Johanna Favrot Fund for  
Historic Preservation

Bobbi Hardiman

HealthNet

John Held

Mark & Katherine Johnston

Margie Kitano

Leaf & Cole, LLP

Peter & Inge Lehman  
Endowment Fund  
for the Arts

Ashley Copp

A.O. Reed

RSM Design

Joseph Mayer

Ed & Gail Miller

Stephanie & Ron Oliver

The San Diego Foundation

Dr. Seuss Foundation

Siemens

Dave Smith

U.S. Bank Private Wealth  
Management

Waxie

The Weekes Balboa  
Park Fund 🌈

*Recognition reflects gifts and pledges of \$1,000 and more from January 1, 2018 - December 31, 2018*