

# Inspire Encourage Support



ANNUAL REPORT

2016

YEAR IN REVIEW



Mission Statement

The Scholarship Foundation of Santa Barbara inspires, encourages, and supports Santa Barbara County students in their pursuit of college, graduate, and vocational school education through financial aid advising and the granting of scholarships.

DEAR FRIENDS,

For 54 years, the Scholarship Foundation of Santa Barbara has supported local students and their pursuit of higher education. We have successfully done this in partnership with you, our valued donors, volunteers, and community partners.

While not always immediately obvious, there is a real and growing need for our scholarship and financial aid advising services in Santa Barbara County. The average family income for a Scholarship Foundation undergraduate recipient is \$60,000. Twenty-eight percent of our recipients live below Federal Poverty Guidelines and almost two-thirds of our recipients are from families with incomes deemed very low, low, or moderate by the Department of Health and Human Services. As the cost of tuition continues to outpace inflation, these students need our help to earn college degrees and break the cycle of poverty for themselves and their families.

This year, thanks to generous supporters like you, we provided scholarships to 3,019 students who are pursuing diverse degrees and careers – engineering, art, agriculture, nursing, and more. In total, we distributed a record \$8.76 million. Unfortunately, we continue to turn away hundreds of deserving students due to lack of funds. That is why we provide free financial aid trainings, workshops, and one-on-advising so that students learn how to secure other sources of financial support. In 2016, we helped our scholarship recipients obtain an additional \$45 million in aid from federal, state, and institutional sources.

In this report, you will be introduced to a few of our students. Although they come from different areas of the county and backgrounds, they share the common characteristics of being hard-working, determined, and deeply appreciative of your support. They are why we celebrate a truly tremendous year and why we remain committed to helping even more students in 2017.

Thank you for being a part of our community. We hope you will see in the following pages how your support has created new opportunities and transformed lives...one scholarship at a time.



  
Candace Winkler  
PRESIDENT & CEO



  
Barrett O'Gorman  
BOARD CHAIR



STUDENT STORIES



Paying it Forward  
The Four Ingenieros

“**THERE’S A POPULATION** who don’t get certain opportunities—maybe they work, maybe they have a family and they can’t focus on their education,” stated Juan Zepeda, a former Scholarship Foundation recipient. “We want to help that population because we *were* that population.”

Meet the Four Ingenieros, former Santa Barbara City College STEM students who started a local chapter of the Society for Hispanic Professional Engineers (SHPE), and didn’t stop there.

Juan and his friends—Noe Gonzalez and Luis Miguel Garfias, also our alumni, and Neftali Aguilera—bonded during their time as officers of the SHPE chapter, and

stayed connected even after they transferred to other colleges to complete their bachelors' degrees.

After graduation, they formed the Four Ingenieros Foundation to find engineering internships for STEM students of color. “Rarely did I hear people suggest, ‘You should be an engineer,’” Juan remembered. “A lot of these students need to be inspired.”

Both Juan and Noe recognize how support from the Scholarship Foundation helped them work less and study more, and for Noe in particular, that boosted his GPA significantly. Those experiences prompted them to want to help the next generation of engineering students, and pay it forward.

Dedicated to the Future  
Arthur Ludwig & Maya Shoemaker

**THE SCHOLARSHIP FOUNDATION** has supported several generations of Santa Barbara County families over the years. Arthur Ludwig and his daughter, Maya Shoemaker, are one such example.

During the late 1980s, Arthur attended University of California, Berkeley with our support, studying integrated, ecological systems design. Over the last 35 years, Arthur has shared his expertise with Santa Barbara through Oasis Design, a natural fit for our water-deprived county.

Maya went a bit farther from home, to Evergreen State College in Washington, and majored in Environmental Studies. Currently, Maya works at the Wilderness Youth



Project, a local organization dedicated to teaching the next generation to be good stewards of our planet.

As a small business owner, Arthur is worried about being able to pay young employees enough to both eat and repay their loans.

He is also worried about graduates turning away from their ideal careers and taking higher-paid positions as the only way to pay back their student loans.

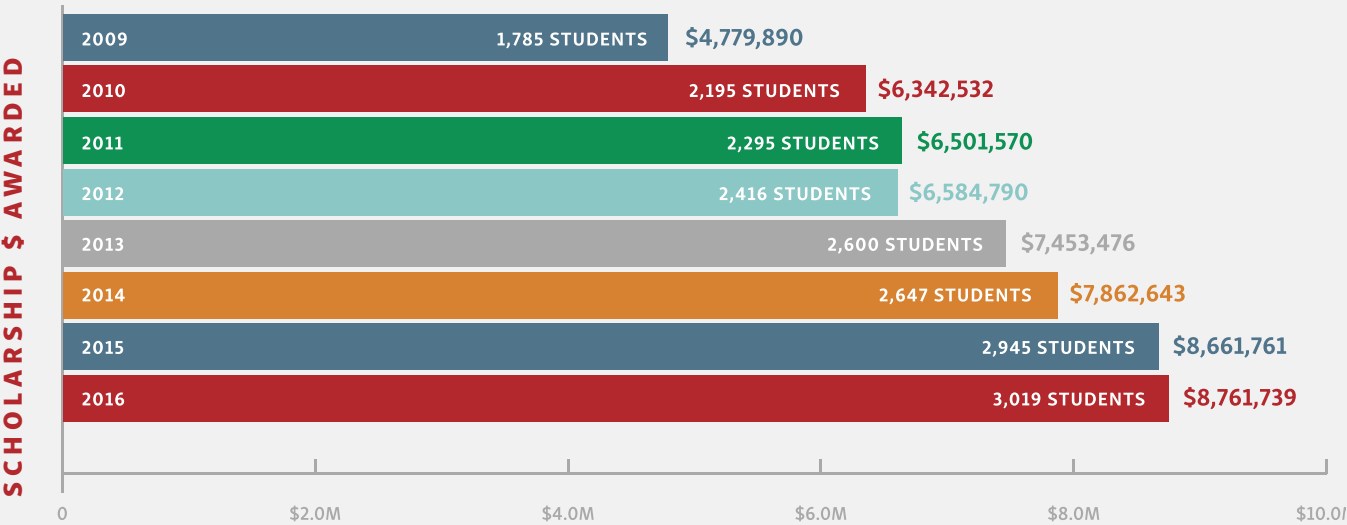
“There’s only one thing a person can do with student debt,” explained Arthur. “Just toil away until it’s paid off.”

Maya considers herself fortunate that her Orfalea Scholarship allowed her to focus on her degree and graduate in 2013 without debt. “If I had accrued debt, there’s no way I would have been able to do the things I’ve done,” she admitted. Maya extended her education by volunteering across Europe and Asia for a year.

After her travels, Maya’s lack of student debt made her job at the Wilderness Youth project possible—a job that she says doesn’t provide a huge paycheck but “nourishes me.”

Both father and daughter are committed to keeping their community—and the planet—sustainable. And they attribute their ability to do so to their education, and the Scholarship Foundation’s support. “I feel lucky I can make this choice,” Maya observed. “I’m very grateful.”

OUR COLLECTIVE IMPACT





## STUDENT STORIES

### First Generation Ambassador

Yesenia Aldapa

**"I'VE HAD MANY SLEEPLESS NIGHTS** and stressful days, but I know my degree will be worth it." Yesenia Aldapa, recipient of the Casa Dorinda Scholarship, looks forward to next summer, when she will finish her psychology degree at California State University, Northridge.

Yesenia transferred from Santa Barbara City College, where she earned three associate degrees in just two years. As she enters her final year of school, she's helping others achieve their dreams of higher education by working as a University Ambassador for the Student Outreach department.

"I feel like this is what I'm meant to be doing," explained Yesenia. She is excited to share with future first-generation college students about the great programs and opportunities available to help them, like the Scholarship Foundation.

"The foundation didn't just give me money; you were incredibly supportive," Yesenia remembered. One of the Scholarship Foundation's Program Advisors called her every semester to ask about her classes, and offer assistance and encouragement. "I'm going to remember that for the rest of my life. Your support has given me the wings I needed to fly."



### Service to the Community

Andrew Myers

**VOLUNTEER TUTOR.** Eagle Scout. Captain of the varsity tennis team. President of the St. Joseph High School underwater robotics team. And that's not all—Andrew Myers consistently ranked as one of the top three students in his school every term.



When Andrew initially considered going to college, his first thought was how he would pay for it. Andrew received the Floro Scholarship, a legacy gift from Gwendolyn Floro through the Santa Barbara Foundation, which requires the recipient to complete at least 200 hours of community service.

"For me, community service wasn't about recognition," explained Andrew. "It was a way to develop leadership skills and help people. I saw how my actions affected them personally."

Andrew will continue helping people as a biomedical engineer major at Cal Poly, San Luis Obispo. He's on a fast track to his chosen career, robotic prosthetics.

Because of the scholarship, Andrew hasn't had to take on student loans, and without that stress, he'll be focusing solely on his education.

"Receiving the scholarship wasn't just about the money," he emphasized. "It was an honor. I was proud to see that my accomplishments meant something."

Yesenia Aldapa (center) with sister Adilene (right) and father Ruden (left).

## EVENTS

### Celebrating Community Leadership



### Bringing the Community Together in Lompoc

**IN OCTOBER 2015,** the Scholarship Foundation launched our first community fund, the Lompoc Valley Community Scholarship, during a reception at the Longoria Winery. The fund allows members of the Lompoc community to direct their support to scholarships specifically for local students.



### Donor Appreciation

**FOLLOWING OUR ANNUAL** North County and South County Awards Ceremonies, the Scholarship Foundation hosted events to thank our many donors and volunteers. We held our North County Reception at the Santa Maria Country Club, and our South County Annual Dinner at the Santa Barbara Historical Museum. At each event, students spoke of how scholarships made a difference in their lives.

Photos, top left: Michael Carroll, Bruce Coggin, board member Christie Glanville. Top right: Catherine Brozowski, Orfalea Foundation; Barrett O'Gorman, Board Chair; Candace Winkler, President & CEO and Community Leader Speaker; Elena Georgieva, student speaker; and Lois Mitchell, formerly of Orfalea Foundation. Bottom left: Sandy Power with scholarship recipient Diego Hernandez Ramirez. Bottom right: Tatiana Cruz, recipient of the Lorna Hedges Art Scholarship.

### Achievement in Artistry



**AT THE 37TH ANNUAL** Art Scholarship Competition in January, 21 high school seniors were awarded scholarships to pursue art-related majors in college. The students presented their work one week later at a reception, where families, friends, and many generous art patrons celebrated their art and achievements.



# encourage

## 2016 PROGRAM HIGHLIGHTS



Photos (left to right): Program Advisors José Olvera and Liliana Cardenas at Allan Hancock College's Santa Maria campus; The Hernandez family is all smiles at the North County Awards Ceremony.

### Outreach & Financial Aid Advising

Throughout the year, our Program Advisors offer assistance with scholarship applications, complex federal and state financial aid forms, understanding financial aid award letters, and managing student aid—free of charge to every student in Santa Barbara County. In 2016, over 36,500 people were reached through this program. Students who received our scholarships secured an additional \$45 million in federal, state, and institutional aid.

### The College Scholars Academy

Now in its third year, the College Scholars Academy is focused exclusively on building the college awareness and personal confidence of young men of color. During the program, 12 students have met with our Program Advisors to explore topics such as college fit, career readiness, and leadership skills. In addition, they toured several college campuses and, in their final year, they will begin submitting college applications. We are proud to share that all of the participants are planning to attend college.

### Student Retention & College Completion

First generation and other underserved students have lower college enrollment rates and higher dropout rates than their peers. This year through the Scholarship Foundation's Achieve program at Santa Barbara City College and Allan Hancock College, over 150 students received one-on-one mentoring, attended a monthly support group, and were connected to campus resources. Achieve is helping improve the retention and transfer rates for lower-income students.

### Scholarship Awards Ceremonies

This May we celebrated 3,019 scholarship recipients at our annual Awards Ceremonies. Our South County students were honored at the Santa Barbara Courthouse's Sunken Gardens, and the North County students at Santa Maria's First Christian Church. At both events, hundreds of recipients walked across the stage and had the opportunity to thank the generous donors who provided their funding.

## PROGRAM HIGHLIGHTS

824  
FREE

INDIVIDUAL  
FINANCIAL AID  
ADVISING  
SESSIONS  
PROVIDED

36,500+  
PEOPLE ATTENDED  
OUTREACH  
EVENTS

\$45 M

ADDITIONAL  
FEDERAL, STATE &  
INSTITUTIONAL AID  
OUR SCHOLARSHIP  
RECIPIENTS  
LEVERAGED  
THROUGH  
FINANCIAL AID  
INFORMATION FROM  
OUR ADVISORS

55%

OF OUR RECIPIENTS  
ARE THE FIRST IN  
THEIR FAMILY TO GO  
TO COLLEGE

\$60,000

AVERAGE FAMILY INCOME

FOR OUR UNDERGRADUATE  
SCHOLARSHIP RECIPIENTS

65%

OF OUR  
RECIPIENTS  
ARE FROM  
FAMILIES  
WITH VERY  
LOW, LOW, OR  
MODERATE  
INCOMES AS  
DEFINED  
BY THE  
DEPARTMENT  
OF HEALTH  
AND HUMAN  
SERVICES

2,099

APPLICATIONS FROM  
FIRST-GENERATION  
COLLEGE STUDENTS

28%

OF RECIPIENTS LIVE  
BELOW FEDERAL  
POVERTY GUIDELINES



## Volunteer Spotlight Kay Casey

Kay Casey is no stranger to giving her time to support her community. In addition to volunteering for the Scholarship Foundation, she was active in the PTA during her daughter's school years. Kay has always felt strongly about the importance of education.

**KAY STARTED VOLUNTEERING** for the Scholarship Foundation after her daughter graduated and went off to college. She interviewed new student applicants each spring. During a volunteer appreciation luncheon, Kay decided to join the North County Advisory Committee (NCAC). When the Lompoc Valley Committee was formed this spring, Kay volunteered to be its first chair.

"It's a special place," remarked Kay about Lompoc, the city she's lived in and loved for 38 years. "There's a real community spirit here."

That community spirit was evident last fall, when locals gathered to launch the Lompoc Valley Community Fund. The first of its kind for the Scholarship Foundation, the fund was inspired by the community's desire to pool local resources to support their students.

In fact, in just eight months, the Lompoc Valley Community Fund had received enough donations to award two scholarships last May. But Kay is looking to the future. "Lompoc has a reputation for being extremely generous," she said. "The committee is excited to host a second local event and expand the support for this fund."

Photo (above): Kay Casey volunteering at the North County Awards Ceremony in May.



## CHAMPIONS OF EDUCATION

### Michael Towbes Champion of Education

*“The world has changed over the years but a good education is something which remains with you your entire life, and a good education keeps getting more and more expensive.”*

—MICHAEL TOWBES

**MR. TOWBES’ COMMITMENT** to higher education and long-standing support of the Scholarship Foundation are unparalleled. In 1962, Mr. Towbes joined the Scholarship Foundation’s first board of directors and in the first three years of his tenure, along with legendary board member and first executive director Carolyn Ferguson, he interviewed over 100 local students. He remains an Honorary Board Member to this day and continues to support the Scholarship Foundation through two funds: the Towbes Foundation Honors Scholarship and the Gail Towbes Community Service Award. Gail Towbes, Mr. Towbes’ first wife, who passed away in 1996, joined the board in 1975 and eventually volunteered for the position of the Scholarship Foundation’s first Director of Development in 1983.

Holding a Bachelor of Science degree in Engineering from Princeton and attended graduate school at MIT, Mr. Towbes believes that helping the next generation is a great way to show appreciation for his own educational opportunities. The Towbes Foundation Honors Scholarship supports high-performing students and is one of the Scholarship Foundation’s few multi-year scholarships. Students can apply for renewed support for up to four years, as long as they maintain good grades. When asked why he created a four-year scholarship, Mr. Towbes explained, “It’s important that students don’t feel limited by finances and have a scholarship they can rely on throughout their college career.”

For over 50 years, Mr. Towbes has been a pillar of the Santa Barbara community, both in business and philanthropy. He is the founder and chairman of the board of The Towbes Group and Montecito Bank & Trust. Mr. Towbes and his wife, Anne,



Photo: Anne and Michael Towbes

are known for their dedication to local nonprofits. They have served on many boards and were named, at different times, Santa Barbara’s Man and Woman of the Year.

Despite his many commitments, Mr. Towbes takes time to meet with his scholarship recipients. Since 1982, Mr. Towbes meets for lunch every year with his current Honors Scholarship recipients. The thank you letters from students reflect how touched they are by Mr. Towbes’ interest in them. As student Connie Wang noted, “A unique part of the Towbes Foundation Honors Scholarship is that you get to build a personal relationship with Mr. Towbes and get to know him as a person, not just a donor.”

While Mr. Towbes encourages the students to keep in contact with him, perhaps over lunch or coffee or through a casual, written update, he makes a point of not infringing on their lives. “I know they’re off doing important things,” Mr. Towbes said. “But I make it clear that I’m available to them.”

So far, the Towbes Foundation Honors Scholarship fund has supported 31 students. He remains in contact with many of those students, including the first person who received the scholarship—she’s currently a teacher at San Marcos High School. Another former recipient he follows is Arthur Swalley, a Scholarship Foundation board member and the current president of the Santa Barbara Symphony’s board of directors.

“I’m so pleased I’ve been able to keep in touch with many of the recipients over the years,” Mr. Towbes commented. “And I’m proud of what they’ve accomplished. It’s really quite awesome.”

### Connie Wang

#### Towbes Foundation Honors Scholarship Recipient

**“WHEN I APPLIED TO COLLEGE** in my senior year at Dos Pueblos High School, Yale was my first choice. I just had my heart set on it,” recalled Connie Wang. “It had always been my dream school.”

But Connie’s dream was far from reality. “The price tag of a Yale education is truly astounding,” Connie commented. The thought of the potential financial burden for her family weighed heavily on her, and she applied to the Scholarship Foundation.

As she was ranked first in her class with a 4.93 grade point average and had extremely high standardized test scores, she was selected for the Towbes Foundation Honors Scholarship. She received the scholarship for all four of her years at Yale.

“I always felt like Mr. Towbes was personally invested in my academic career, my intellectual pursuits, and my life in general,” Connie shared. Mr. Towbes is known for inviting his scholarship recipients out to lunch during their summer breaks, and Connie remembers one in particular. Mr. Towbes included his daughter, a clinical psychologist who works with children and families. “It was so thoughtful, as her profession was a perfect match for my interests.”

Connie graduated from Yale in May, and will take a year off to work as a research fellow to broaden her knowledge of the legal field. But she still plans to follow her heart—public interest law with a focus on children’s rights and disadvantaged youth.

“I would not be the person I am today without the privilege of attending Yale,” Connie concluded. “And I wouldn’t have been able to do that without the support of Mr. Towbes and the Scholarship Foundation.”



*“I always felt like Mr. Towbes was personally invested in my academic career, my intellectual pursuits, and my life in general.”*

—CONNIE WANG



### In Memoriam Edward & Barbara Vernon

Edward “Ed” Vernon and his wife, Barbara, were supporters of the Scholarship Foundation for 31 years. The Scholarship Foundation was saddened by the loss of this generous couple who passed within just days of each other last February.

The Vernons established their first endowed fund in 1998 to further the value and importance of the Scholarship Foundation’s work. In 2014, the Vernons created a second endowed scholarship fund to support students pursuing a career in special education, in honor of their granddaughter Jessica, who has special needs.

Although the couple met in high school, they married in 1947 after Ed returned from his Naval service during WWII. His first job out of college was with General Electric and, after settling in the Santa Barbara area a decade later, he founded Development Associates Controls (D.A.C.) in 1964.

Ed and Barbara enjoyed traveling as well as sailing locally and around the world with friends and family. After he retired in 1996, Ed traveled extensively through Baja, California, and authored several books on the area and other locations in California.

The Vernons’ past and enduring support, including a generous gift from their estate, will continue to provide opportunities for students to pursue their academic goals into the future.

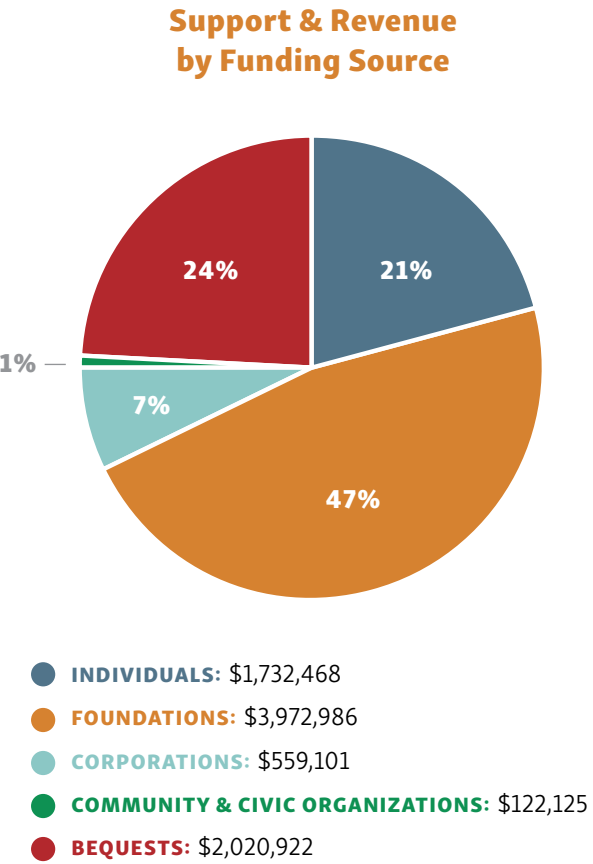
SCHOLARS CIRCLE 2016

The Scholars Circle acknowledges the extraordinary altruism of individuals who remember the Scholarship Foundation in their estate plans. Some of the most transformative gifts in the organization’s history have come from the bequests of Scholars Circle members, and others who have honored the Scholarship Foundation in this special way.

Chris & Anita Anderson	Steve & Patsy Hicks	Sandra Robertson	Mary Jo Swalley
Joan D. Arnold	Jim & Shirley Ann Hurley	& Gene George	Michael Towbes
Lida Light & Frank Blue	Eric Hvolboll	Rick & Regina Roney	*Marilyn Van Donge
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Naomi Greenstein	Clayton & Blaine Patino	Evelyn E. Sullivan	
Norm & Jane Habermann	Helen & Robert Peteler	Arthur & Winnie Swalley	



FINANCIAL HIGHLIGHTS



Financial Position  
as of June 30, 2016

ASSETS

Cash and cash equivalents	4,756,960
Pledges receivable	2,165,363
Investments	41,793,711
Property and equipment, net	205,328
Other assets	688,254
<b>Total Assets</b>	<b>49,609,615</b>

LIABILITIES AND NET ASSETS:

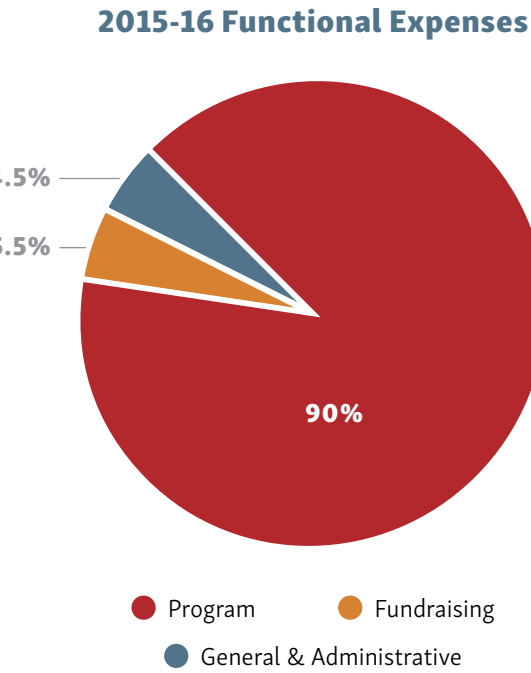
LIABILITIES:

Accounts payable and accrued expenses	100,223
Scholarship awards payable	7,749,044
<b>Total Liabilities</b>	<b>7,849,267</b>

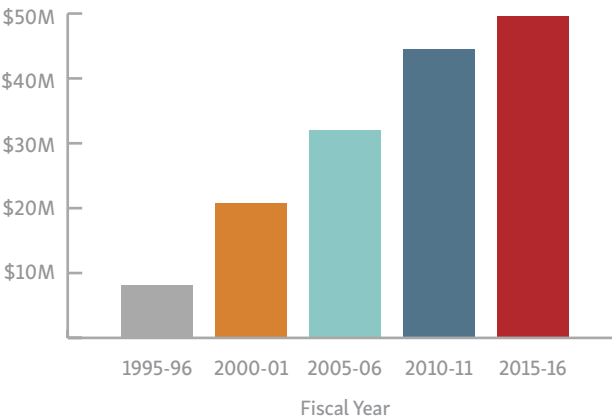
NET ASSETS

Unrestricted	7,881,044
Temporarily restricted	3,685,128
Permanently restricted	30,194,176
<b>Total Net Assets</b>	<b>41,760,348</b>

TOTAL LIABILITIES AND NET ASSETS 49,609,615



20 Year Asset Growth



This is an unaudited financial statement. For a copy of the Scholarship Foundation of Santa Barbara's audited financial statements, please check our website after January 1, 2017 or call (805) 687-6065.



THE 22ND ANNUAL SOUTH COAST BUSINESS & TECHNOLOGY AWARDS

Established in 1995, the **South Coast Business & Technology Awards** recognize members of the business and technology community who are at the cutting edge of innovation, management, and service.

The Scholarship Foundation has been the recipient of event proceeds since 2001, and 100 percent of the net proceeds fund educational scholarships for local students pursuing business and technology degrees.

The money raised from the South Coast Business & Technology Awards has funded 811 scholarships for a total of over \$1.8 million. In 2016 alone, the Awards raised \$154,600 in scholarships for Santa Barbara County students.

We want to express our appreciation for Susan Rodriguez and Steven Amerikaner who co-chaired the 2016 event, as well as for their great team of volunteers who served on the Steering Committee.

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The Towbes Group  
UCSB College of Engineering  
Venoco  
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Visus, LLC  
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Westmont College  
Yardi Systems



Photo (left-right): Gordon Morrell, Yardi Systems (Executive of the Year); Sandra Hirsch, Isolite Systems (Entrepreneur of the Year); Tanya Staples, Lynda.com, a LinkedIn Company (Company of the Year); Primera Vice Presidente Rhonda Henderson and El Presidente J.C. Gordon, Old Spanish Days of Santa Barbara (Excellence in Service); and George Powell, Skate One (Pioneer Award).

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