

UC SANTA BARBARA

Answering the Call

Annual Report of Planned Giving
for the Year Ending June 30, 2020

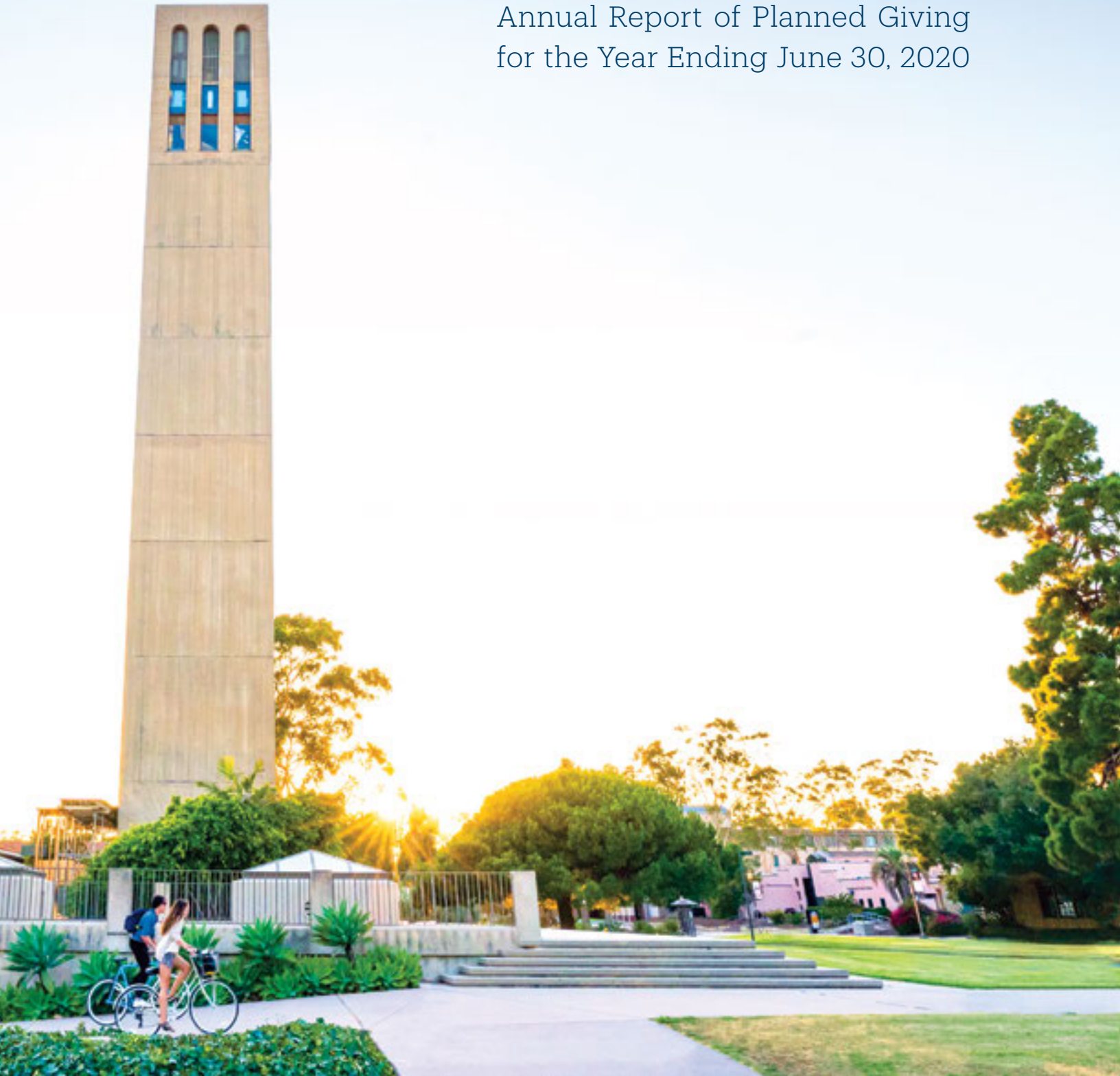


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Dear Friends,

Welcome to our 2019-20 Annual Report of Planned Giving. We are inspired by the dedicated donors who continued to step forward and finalize their legacy commitments to UC Santa Barbara during this year. Once again, we have exceeded our annual goal for the number of planned gifts thanks to the generosity of these wonderful donors, and we are deeply grateful.

This year's report gathers stories from alumni, trustees, faculty, and friends to share their UC Santa Barbara connections and legacy goals. The wide variety of experiences shared collectively illustrate the significant impact our university has had on so many.



We hope you find inspiration in these donor profiles. If you are inspired to explore your own planned gift, we'd be happy to assist you in creating a vision for your legacy. It is always a true pleasure to partner with those helping to secure the future of our beloved university.

Warmly,

A handwritten signature in black ink that reads "Ilana". The signature is fluid and cursive, matching the name of the person in the adjacent photo.

Ilana Ormond
Senior Director, Planned Giving

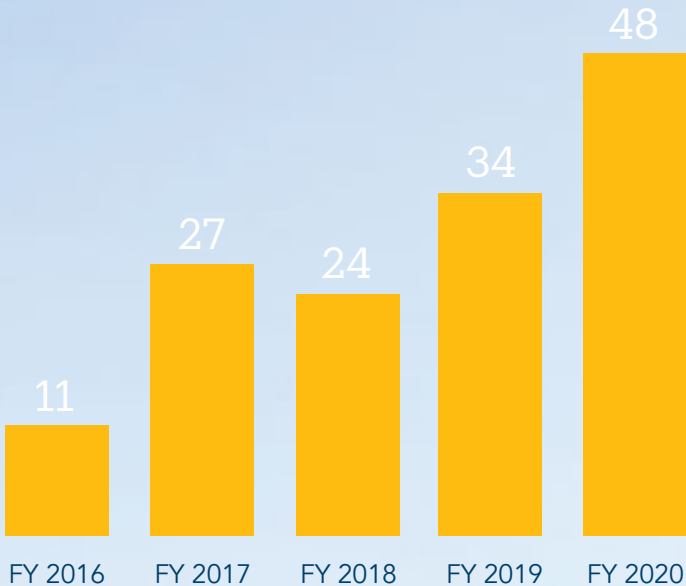
Legacy Giving

Growing Impact of Legacy Gifts

Through planned gifts, our donors craft powerful philanthropic visions and leave meaningful legacies. Legacy gifts help UC Santa Barbara fulfill our promise to educate students and pursue high-impact research. Our community of supporters has embraced the power of planned giving. The forward-thinking members of our Legacy Circle have answered the call for the public good.



**New Legacy Circle
Members by Year**



Stories of Commitment





The Power of Scholarships

Trustee Norm Habermann and his wife, Jane, put college within reach



UC Santa Barbara Foundation trustee and former board chair Norm Habermann became involved with campus over 30 years ago, drawn by a strong interest not only in education but also in teaching. Norm and his wife, Jane, have supported scholarships at UC Santa Barbara over the course of 22 years.

“Jane and I are firm believers that no eligible student should ever be unable to go to college because of financial reasons,” said Norm. “We believe that a good education helps students build a foundation for future success in life for themselves and others.”

Norm taught a marketing course to UC Santa Barbara seniors for three years, donating his honorarium to scholarships. While he was very involved in UCSB,

Jane served as a long time board member of the Santa Barbara Community College Foundation, where he periodically lectured. Norm and Jane are very active with the Santa Barbara Scholarship Foundation, where Norm has served as a board member for more than 20 years.

“Our giving has a lot to do with my long-term involvement with UC Santa Barbara and the enjoyment of teaching,” said Norm. “I’ve made a number of friends, met interesting people and participated in many things I otherwise wouldn’t have experienced.”

Norm brings 40 years of business experience to UC Santa Barbara. After graduating from Rutgers University, he served as a lieutenant in the Navy and thereafter got an MBA. During his business career, he had the privilege of being CEO, president, or founding partner of four NYSE public companies in the restaurant and food service industry. Over the years, he has served on a number of corporate boards, and now he and Jane are involved with various community boards.

“As UC Santa Barbara enrolls a more diverse student population every year, providing robust support for our low-income, first generation students is more important than ever before,” said Michael Miller, assistant vice chancellor for enrollment services. “Thanks to scholarship support such as this, we can ensure the success of our students who will undoubtedly go on to change the course of many lives after they graduate. Norm and Jane are a great example of their giving and we’re forever grateful for their support.”

“If you can give scholarships that allow people who wouldn’t go to college to get there, you’ve done your job,” said Norm.

Taking Root at UC Santa Barbara

Trudi Kerkmeyer '60 helps students grow



Florence Tradelle "Trudi" Kerkmeyer '60 arrived at UC Santa Barbara as an orphan and graduated with mentors, dear friends, and a lifelong passion for botany. She made the generous decision to leave her estate to the biological sciences in honor of those who helped her find her place.

Trudi's father, a hardhat diver for the Navy in Eritrea, was only supposed to be on assignment for nine months when he passed away from an illness, leaving her mother alone with two young children during World War II. When Trudi was 15 years old, her mother died. Trudi's grandfather became her guardian until she left to study biology at UC Santa Barbara. Freshman year, Trudi received news that her social security had ended. Distraught, Trudi confided in a professor.

"Professor C.H. Muller asked, have you got a bicycle? Well, you can work at the laundromat in Goleta every afternoon," said Trudi. The laundromat paid Trudi \$1.50 an hour for her freshman and sophomore year, but it wasn't enough. She took a year-long break to work and save money.

"I hope my bequest will allow students to continue to get their degree without having to take a break like I did," said Trudi. "Once you take that break, it's very difficult to go back to school."

Trudi returned to campus to learn and work in the UC Santa Barbara herbarium. After graduation, she worked in the Beaudette Foundation marine biology lab with an algologist and continued her studies with a professor who would lecture students with Trudi's pet kitten, Ulysses, in his lab coat pocket. Trudi was drawn to education, and with a credential from what would become the Gevirtz Graduate School of Education, she would go on to a 30-year career teaching junior high. Now retired and living in Santa Ana with Jerry, her husband of 48 years, she still finds herself teaching in the garden.

"Look at the fruit," passersby will mistakenly exclaim when passing Trudi's vibrant plumeria. "Do you get to eat it?" Trudi always stops to explain how the pods are where the seeds grow. She also gives away succulents to curious young children.

Trudi's legacy gift to the biological sciences will ensure that students keep growing despite hardship. She will take the place of the professors and mentors who helped her as an undergraduate.

"I was able to go home to grandpa, whereas some of the kids that I hear about on campus don't have anywhere to go," said Trudi. "Helping them is important to me."

Unconventional Curricula

Writer and physician Wes Fields '76 helps student writers find their voices



Dr. Wes Fields '76 arrived at UC Santa Barbara in pursuit of dual careers in literature and life sciences. He dreamed of a future as a physician-writer. The College of Creative Studies (CCS) allowed him to split time between pre-med courses and small tutorial writing classes. His mentor was the founding dean of CCS, Marvin Mudrick. This formative relationship inspired Wes to establish a Writer-in-Residence Endowment in memory of Professor Mudrick. His goal for a generous legacy gift is to help talented CCS students as well as the Writing & Literature program develop their identities.

"Wes's generosity will positively impact future generations of CCS W&L students who will be able to interact directly with and learn from authors, writers, and other luminaries," said Gerardo Aldana, dean of CCS. "This opportunity mirrors his own experience at CCS as a student, and we are grateful to him on behalf of future students."

"No one at CCS ever told me what classes to take or asked me to choose one major over another," said Wes. "CCS is unsurpassed in its ability to provide undergraduates access to faculty and resources that ordinarily are only available at the post-graduate level. The award-winning research, technologies and art produced by CCS students speak for themselves."

Through an education that allowed him to understand humanity as an artist as well as a scientist, Wes learned how to combine his talents. Over his 40-year career in emergency medicine, he became an active participant in the narratives of more than 80,000 patients.

"Great writing turns on connections that others miss in the world around them," said Wes. "For me, the clinical practice of emergency medicine is much the same."

Protecting access to emergency care became an important part of his career. "It became clear to me that health policy wasn't driven by data alone," said Wes. "Health politics is largely about who controls the narrative. And nothing is more compelling for policy makers than the stories of real patients."

In 2011, Wes co-developed the Emergency Medicine Action Fund — a platform for legal and regulatory advocacy for ER's during the rule-writing phase of the Affordable Care Act. The process leveraged everything he learned about storytelling and science at CCS.

Attending the Bread Loaf Writers Conference in Vermont reminded Wes of the power of faculty interactions with individual writers in small workgroups. He wanted to help the W&L program at CCS generate more energy of the kind he experienced with his own mentor.

"Ultimately, what I learned from Marvin had far more to do with what it meant to be a human being than the craft or technique of writing stories," said Wes.

Conversations That Matter

John '71 and Karen Jostes help Bren students make bold moves



Like many students who attended UC Santa Barbara during the 1969 oil spill, John Jostes '71 felt compelled to help. Before the Coastal Act was even passed, John was working under a grant to place a dollar value on a trip to the beach. Thus began a career in urban planning and coastal management that spanned 46 years and brought him full circle — teaching UC Santa Barbara students and supporting their professional development through a legacy gift.

In 1975, John became the first environmental analyst for the City of Santa Barbara. John launched his second consulting business while working for the city. For 20 years, he solved environmental challenges aided by UC Santa Barbara students, estimating that he had hired 70 Gauchos as interns between 1975-2000.

After a successful gig as a lecturer in 2004, John returned to the Bren School of Environmental Science and Management to teach negotiation, leadership, and project management from 2006-2019.

“Education has become engaging, testing, and doing,” said John. “I want to help students learn who they are by revealing themselves under stress. That’s how you develop intuitive confidence.”

John’s courses simulated tense real-life situations. Former students say that they use their negotiation skills weekly. As an instructor, John introduced students to his contacts around the country. The Jostes created the Bren School Special Opportunity Fund to enhance the experience of master’s students.

“It became apparent that students needed to get themselves out in the professional world as risk-takers. It’s a strategic approach to having conversations that matter,” said John. The Jostes’ legacy gift will help Master’s Group Project teams present their client solutions around the country.

“Through the Special Opportunities Fund, I attended a conference where I met the aquaculture team at Conservation International,” said Garrett Goto '19. “One conversation led to an interview, and that interview led to a job offer.”

“Through these invaluable opportunities, students will expand their networks, showcase their work, and further Bren’s integrative approach to environmental problem-solving,” said Steve Gaines, dean of the Bren School. “Private support like John’s has a lasting impact on their future careers as leaders in the environmental field.”

John and his wife of 21 years, Karen, are longtime supporters of the Bren School as members of the Dean’s Council. Karen is a fifth-generation Santa Barbaran descended from a local fishing family that dates back to the late 1800s. Together, they nurture a strong connection to the Santa Barbara community.

“It is so empowering and so magical to know that I was able to nudge some people’s careers,” John said. “That’s been a value and a theme of my engagement with UC Santa Barbara.”

The Life-Changing Magic of Study Abroad

Dr. Jodi Anderson '94 helps Gauchos learn in the U.K.



Dr. Jodi Anderson '94 remembers flipping through the UC Santa Barbara general catalogue like it was a magazine, eagerly circling classes. As the first in her family to attend college, she immersed herself in campus life. Interning through UCDC (formerly the Capitol Hill program), studying abroad in Mexico, volunteering with Associated Students — each experience heightened her sense of possibility. Through a generous legacy gift, Jodi and her husband, Christopher Field, will help students become more globally minded citizens through their support of the U.K. Education Abroad Program (EAP) Scholarships.

After graduating in 1994, Jodi worked in student affairs on campus. She then received a full scholarship to pursue her master's degree in social policy at the University of Nottingham in England. The scholarship allowed Jodi to embrace life in the U.K., where she met the man who would become her husband. Upon her return, Jodi served as student representative to the UC Board of Regents during her Ph.D. studies in education at UCLA and stayed engaged as a UCSB alumna.

"I didn't earn a lot of money as a new graduate, but my perspective has always been that we should give what we can," said Jodi. "I started giving to UC Santa Barbara in 1995 — not a lot, but I made regular donations. We can achieve extraordinary things by all coming together to support UCSB. Just think if every graduate gave \$100 back every year!"

When Jodi joined the UC Santa Barbara Alumni Board in 2005, she felt an urgency to create more opportunities for first-generation and low-income students. During her tenure, the Alumni Board established a scholarship fund that has distributed nearly half a million dollars.

Keen to stay involved with UC Santa Barbara after moving to England, Jodi formed a London supporters group with Mike Trovato '95, Matthieu Duncan '87 and UC Santa Barbara Foundation Trustee Philip White '84. In 2012, they established the U.K. EAP Scholarship, which has supported over 50 students as of 2020.

"In addition to making a difference in the lives of students, the opportunity to work with phenomenal like-minded people like Matt, Phil and Mike is yet one more reason that I love staying involved as a supporter," Jodi said.

"Students worry about whether they can afford this experience," said professor Juan Campo, director of UC Santa Barbara EAP. "Private support is critical. Students who travel return wanting to make a difference based on their experience."

By including the fund in their estate plan, Jodi and Chris will help ensure the longevity of the U.K. EAP Scholarship.

"Chris and I want to see graduates with global perspectives and the skills necessary to navigate an increasingly complex international community," said Jodi. "I have been helped so many times in my life, and giving back to UC Santa Barbara allows me to extend the support I received to future generations of Gauchos."

Generosity as Compass

Thomas Massa '68 provides scholarships for geography students



When Thomas Massa graduated from UC Santa Barbara in 1968, he was one of only eight geography students. The department has since grown to lead the integration of natural, social, and information sciences to understand and solve problems of people and the environment. Tom has made the first bequest commitment to the UC Santa Barbara Department of Geography in its 57-year history, hoping to inspire students to be curious about the world.

"An interest in geography is an important thing to have," said Tom. "To me, geography is the correlation of everything. If it helps somebody stay on the path to learn about the world, maybe they will make a difference."

Faculty in the Department of Geography unite aspects of international development, urban and regional planning, climatology, earth and marine sciences, statistics and operations research, and environmental psychology. Knowing where things are, why they got there, and how they work is critical to understanding our world today and how it is changing.

"Tom's generous gift will support generations of geography students and the myriad impacts they will have on society in their post-graduation careers," said Dr. Stuart H. Sweeney, chair of the Department of Geography. "Private philanthropy furthers our research and teaching mission and promotes understanding of planet Earth and its inhabitants."

Tom's curiosity about the world began with stamp collecting at age eight. Decades later, during his 36-year teaching career, a colleague mentioned that most people couldn't name four countries in Africa. Tom listed 32 before she stopped him. At one point, he had a stamp from each one at home.

Tom also remains close to nine of his college friends, and the group meets up approximately every three years, traveling from Tennessee, Illinois, and across California to play cards and tell stories. They have celebrated the Department of Geography's 50th Anniversary and many reunions together. For Tom, who still has "Keep UC Free" bumper stickers from 1966, the life-changing experience of university should be available to anyone, regardless of income.

"I am passionate about affordable education," said Tom. "Scholarships are just the right thing to do."

Story of Impact





Cultivating a Legacy

A generous bequest from renowned plant anatomist Katherine Esau



Dr. Katherine Esau studied botany in three languages and two continents — through revolution and emigration — to reach the height of her field. When she arrived at UC Santa Barbara in 1963, she had already led a groundbreaking career in the structure of plants. Although she officially became a professor emerita in 1965, she continued researching into her early nineties. Through the scholars she trained and a generous bequest to support the plant sciences on campus, Dr. Esau left a legacy of scientific inquiry to UC Santa Barbara.

Born in 1898 to a German Mennonite family in Russia, Katherine Esau and her hometown of Yekaterinoslav both were named for the agricultural impact of Catherine the Great. Her father was the mayor and loyal to the czar. After the Bolshevik Revolution, which interrupted young Katherine's studies in Moscow, the family feared persecution. The Esaus fled to Germany on a cattle train just one day before posters seeking her father appeared. After Katherine's graduation from the Berlin Agricultural College in 1922, the Esaus immigrated to the United States.

Dr. Esau received her doctorate from UC Berkeley in 1931 and joined the faculty at UC Davis where she studied phloem tissue and plant viruses. When Dr. Vernon Cheadle joined the faculty at UC Davis, they formed a strong research partnership. Dr. Esau's 1953 book "Plant Anatomy" is a classic in the field. In 1957, she became the sixth woman elected to the National Academy of Sciences, and in 1989, she became the first botanist to be honored with the National Medal of Science.

When Dr. Vernon Cheadle became chancellor of UC Santa Barbara in 1963, Dr. Esau also moved to UCSB so they could continue their collaboration. At UC Santa Barbara, Dr. Esau would continue researching and revising "Plant Anatomy" for 22 years. According to her friend and colleague Dr. Ray Elvert, she considered her UC Santa Barbara years her most productive.

Dr. Jennifer Thorsch '76,'81 joined Dr. Esau's lab in April 1979, when Dr. Esau was 82. She hadn't mentored a graduate student in 18 years and had a stern reputation for organization and efficiency. One day, Dr. Esau wryly remarked on the rare talent she and Jennifer shared: putting pencils away so they all faced the same direction.

"She was the world's foremost and most famous [plant anatomist] — I used her textbooks and attended her lectures," said Dr. Thorsch. "She was an amazing individual as a scientist but also a compassionate human." Dr. Thorsch finished her Ph.D. in 1981 with two publications and two pending because of Dr. Esau's excellent guidance and mentorship. Dr. Thorsch continued her collaboration and friendship with Dr. Esau until her death in 1997.

Dr. Esau's estate gift to further plant sciences at UC Santa Barbara culminated in support for the Cheadle Center for Biodiversity and Ecological Restoration (CCBER). Already the first director of the newly formed CCBER, Dr. Thorsch would also become the first Katherine Esau Director.



CCBER is a UC Santa Barbara facility dedicated to research, education, and outreach related to regional biodiversity and restoration. What makes CCBER special is a natural history collection that preserves the legacy of faculty who, like Dr. Esau, collected as part of their research. The UCSB Natural History Collections is an active research facility that houses over half a million specimens – mammals, birds, diatoms, insects, plant anatomy slides, and pressed plants.

“It’s hard to imagine CCBER without her,” said Dr. Katja Seltmann, current Katherine Esau Director. “Her gift is about preserving core science. It allows me, as the director of CCBER, to bring the center into the research mission of UC Santa Barbara.”

Dr. Seltmann points out that as science advances, so does the utility of the collection. DNA samples can check for contaminants and tell researchers about an organism’s habitat and genetic diversity. In many ways, Dr. Esau will influence plant science for generations.

“Think about the number of students that I will train, that Jennifer trained, that Katherine herself trained,” said Dr. Seltmann. “It’s a lifelong legacy.”

Recognition







Legacy Circle

The Legacy Circle honors alumni, friends, faculty and staff who have included UC Santa Barbara in their estate plans through some form of planned gift. Membership in the society is extended to those who have communicated to the university their intention to make a gift through a bequest, charitable trust, charitable gift annuity, pooled income funds, life insurance, retirement fund or a gift of property with a retained life estate. The following generous donors are providing the legacy of support that will enable UC Santa Barbara to continue to grow and excel.

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 Phil '84 and Ann White
 Robert F. Whitlow* '71
 Drs. Gary '69,'72 and Susan '70,'72,'75 Wilcox
 June* '59 and Knox Williams
 Lowell '69 and Marsha Williams
 Zoe Williams-Lambacher* '76
 Ralph '70 and Irene '66 Wilson
 Dick '66 and Cece Wimbish
 Dr. Samuel* and Frances* Wofsy
 Ditte Wolff
 Ada M. Wood*
 Susan Worster '70 and Bruce Worster PhD '71
 Dawn J. Wright PhD '94
 Dr. Joji Yoshimura '74 and Michael Kronstadt
 Joe* and Patricia Yzurdiaga
 Sherman Zelinsky*
 Janice* and John* Zoeger
 Drs. Leslie '64,'79 and Ernie '66,'72,'89 Zomalt
 Carl B. Zytowski*

*Deceased
 H = Honorary Alumni

Legacy Circle Tea

2020

Chancellor and Dilling Yang hosted the 18th annual Legacy Circle Tea in their home, welcoming over 40 generous donors who have included UC Santa Barbara in their estate plans. Membership in the Legacy Circle continues to grow and we welcomed several new attendees to this wonderful event. Alumni, friends, faculty, and staff who have created legacies with the university enjoyed delicious tea sandwiches and mini desserts while listening to Rafael Costas '86 share his UC Santa Barbara experiences and his decision to name the campus as a beneficiary of his estate. Chancellor Yang acknowledged the ongoing growth in legacy commitments and the impactful role these gifts play in supporting research, teaching, and exceptional programs at UC Santa Barbara.

If you have included UC Santa Barbara in your estate plans and wish to be included in the Legacy Circle, please let us know. We look forward to welcoming you to next year's tea.



Trustee Susan Worster '70, Stephen Pahl '77, Trustee Louise Pahl '77, Trustee Deanna Dehlsen



Trustee Phil White '84, Chancellor Henry T. Yang, Gail Humphreys



Margaret Morez and Trustee Rafael Costas, '68



Virginia Castagnola-Hunter and Mrs. Dilling Yang



Trustee Susan Worster '70 and Bruce Worster PhD '71

Giving Options

The donors profiled in these pages used a variety of planned giving options to create their legacies with UC Santa Barbara. Advantages include significant tax benefits, additional lifetime income and, most importantly, the ability to make a difference for generations of UC Santa Barbara students. Interested in exploring? Below are descriptions of some of the planned giving opportunities available:

- **Bequests:** Name the UC Santa Barbara Foundation as a beneficiary in your will or living trust. We can provide you with the appropriate bequest language so you may direct your gift to the program or project that best fits your passion.
- **IRA/Life Insurance:** Name the UC Santa Barbara Foundation and the program of your choice as a beneficiary of all or a portion of your retirement plan or life insurance policy.



- Charitable Gift Annuity: This option is a contract between you and the UC Regents on behalf of UC Santa Barbara. In exchange for your irrevocable gift of cash or appreciated assets, you can receive a guaranteed, lifetime income in monthly or quarterly installments based on your age. We would be happy to provide you with additional information and a sample proposal upon your request.
- Charitable Remainder Trust: Transfer cash or appreciated property to the trust and receive significant tax benefits and annual income. Payments may be fixed or variable, and the trust must be funded with a minimum of \$100,000. Upon the termination of the trust, the assets are transferred to the UC Santa Barbara Foundation and the program or project of your choice.
- Gifts of real estate are often some of the most creative and beneficial planned gifts. Real estate may be used to fund the life income vehicles described above or a Retained Life Estate.

To learn more about these giving options, please visit plannedgiving.ucsb.edu. If you wish to discuss planned or deferred giving options at UC Santa Barbara, or have questions about how your gift can support a program close to your heart, please contact **Ilana Ormond, Senior Director of Planned Giving**.
805.893.5556 · ilana.ormond@ucsb.edu

In this time of distance, we hope these images of our beautiful campus make you feel at home. Please note that all photography was taken prior to March 2020.

giving.ucsb.edu

