

UC SANTA BARBARA

Lighting the Way

Annual Report of Planned Giving for the Year Ending June 30, 2021

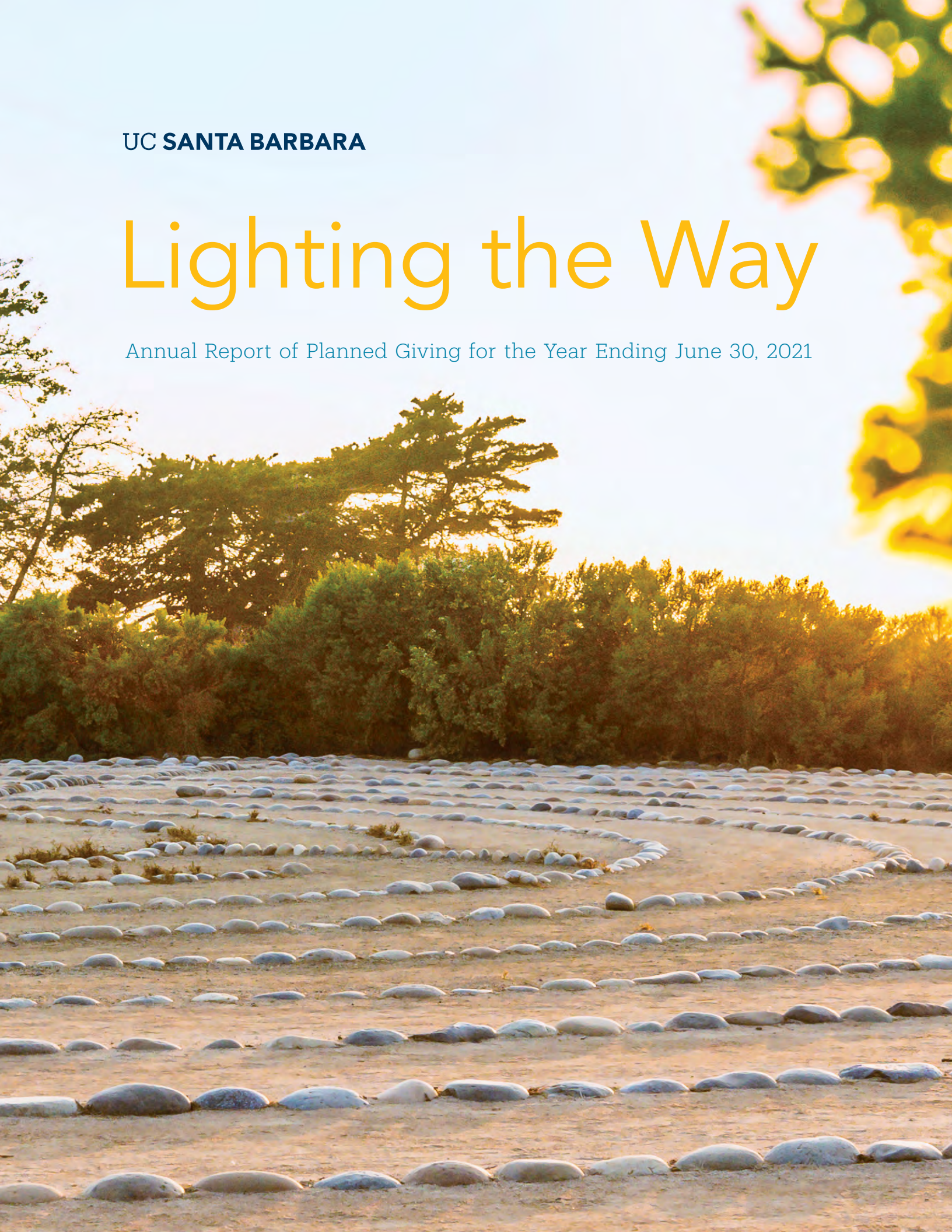


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Dear Friends,

Once again, I am pleased to share UC Santa Barbara's Annual Report of Planned Giving with you. This edition covers 2020-21, a year full of extraordinary challenges. Donors once again stepped forward with planned gift commitments to help ensure the future of our beloved campus.

Of particular note this year is the number of faculty, both current and emeriti, who have included UC Santa Barbara as a beneficiary in their estate plans. These individuals have already created remarkable legacies through their decades of teaching, and they have now guaranteed that these legacies will continue to support the university for generations to come. All the donor profiles in this piece clearly illustrate a passion for UC Santa Barbara that burns brightly, no matter how many years have passed. We are honored to share such wonderful stories.

I sincerely hope that this report inspires you and validates your own personal connection to UC Santa Barbara. Feel free to share your own commitment with us, anonymously or otherwise. Our appreciation runs deep for all those in the past who created their own legacies and those who establish them today. Thank you!

Stay safe and healthy,



Ilana Ormond
Senior Director, Planned Giving

Legacy Giving

Growing Impact of Legacy Gifts

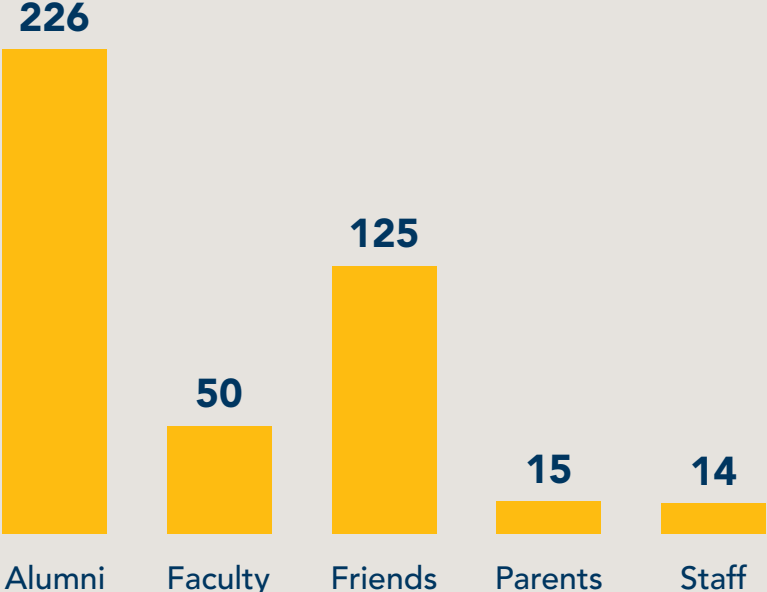
Through planned gifts, our donors craft powerful philanthropic visions and leave meaningful legacies. Planned giving involves a donor's intention to contribute a gift to an organization during or beyond their lifetime as part of financial or estate planning. Giving options may include bequests, charitable trusts, appreciated assets, real estate, retirement plans, and life insurance. These commitments 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, and the forward-thinking members of our Legacy Circle are a guiding light for UC Santa Barbara's research, teaching, and public service.



\$100.8 million total gifts raised in 2020-21



Planned Giving Donor Demographics



Stories of Commitment





A Portal to Knowledge

The Shirley Geok-lin Lim Endowment supports student inquiry



Writer and literary scholar Shirley Geok-lin Lim is a distinguished professor emerita at UC Santa Barbara. During her tenure, from 1990 to 2012, Shirley used the UCSB Library regularly as she taught English, Asian American studies, creative writing, and feminist studies. By naming the library as a beneficiary of a percentage of her retirement plan, Shirley is establishing her campus legacy through two endowed funds that will support the library's undergraduate student success programming and the California and Ethnic Multicultural Archive (CEMA) within Special Research Collections.

Shirley remembers annual trips to the UCSB Library with her 100-student classes. A librarian would guide her students through the Asian American studies research process, continually refining the resources and techniques. The Shirley Geok-lin Lim Fund for Undergraduate Student Success will help the UCSB Library provide students with innovative research services.

"My gratitude for the UCSB Library is deep," said Shirley. "Faculty cannot teach without the library. If students never use library resources, they are not learning how to research. I am a strong believer in libraries from my own experience as a child and through my UCSB experience."

As a child, the library was where Shirley went to read and learn. She would bike to the library in her seaside hometown of Malacca, Malaysia, where she could borrow two books from the children's section and three books from the adult section. A few days later, she would bike back for another five.

She followed that love of reading to the United States as a Fulbright Scholar in 1973 and earned her Ph.D. in British and American Literature from Brandeis University. As a poor graduate student, she felt lucky to land a position in the South Bronx teaching community college, where she connected with her students' eagerness to learn.

All the while, Shirley was writing poetry. With her book *Crossing the Peninsula*, she became the first woman and person of color to win the Commonwealth Poetry Prize. She has published seven volumes of poetry; three short story collections; two novels; a memoir; a children's novel; and many critical academic contributions to her field. The UCSB Library houses her papers in the Special Research Collection's California and Ethnic Multicultural Archive (CEMA).

Funds from the Shirley Geok-lin Lim Endowment for CEMA will provide annual perpetual support for CEMA-related activities, including collection acquisitions, preservation and digitization of CEMA holdings, plus increased programming that features notable CEMA materials and the research that is generated through collection access.

"On behalf of the Library, we are incredibly honored to be included in Professor Lim's legacy planning," said University Librarian Kristin Antelman. "As a faculty emerita, Professor Lim has seen over her long career the positive role the Library plays in student success and academic achievement. Her commitment to student success programming and CEMA is a testament to her deep belief in the academic library to nurture students in their scholarship and provide a place of community and connection."

"The library is a completely open and welcoming space," said Shirley. "Any student can go into the UCSB Library, and the research librarian will look up and simply see a student who needs help."

Magic Slippers

Miriam Birch '57 helps UCSB performers follow a path of adventure



Miriam Birch '57 is the three-time Emmy-nominated writer and producer of many award-winning National Geographic Society television specials, among other productions. Her films have received many Emmys as well as the Peabody and DuPont Columbia awards. Miriam's legacy gift to the UC Santa Barbara Department of Theater & Dance will help aspiring performers follow in her charmed footsteps.

Miriam began her writing career while performing as a mermaid on Bill Burrud Productions' travel series "Islands in the Sun." When Burrud asked Miriam to write her own mermaid monologues, it led to writing documentaries, and she worked her way up to become the company's creative director.

At UC Santa Barbara, Miriam's favorite role was Lizzie in "The Rainmaker," which was presented at the Lobero Theater. Dr. Theodore Hatlen, for whom the campus Hatlen Theatre is named, directed Miriam as Lady MacBeth. While Miriam was honing her dramatic art on campus, she spent summers as a Hollywood showgirl.

"Working as a showgirl had two big advantages," said Miriam. "One: it paid a lot better than the other girls' summer vacation jobs. Two: it was glamorous, professional work with a live audience."

After graduation, Miriam sang her way around the world as a soloist on cruise ships and performed in musicals. Her favorite role in professional musicals was Nancy in "Oliver."

In addition to acting, Miriam studied writing under author and UC Santa Barbara Professor Marvin Mudrick, who encouraged her to keep a journal and started the campus literary magazine "Spectrum." A short story of Miriam's was published in the premiere issue and ten years later in "The Best of Spectrum." The journals that Dr. Mudrick inspired became the framework of Miriam's upcoming memoir, "Fancy Footwork: From Hollywood Showgirl to National Geographic Producer."

Miriam would combine her love of performance and the written word throughout her long career in television. In 1978, she wrote the first of 11 National Geographic television specials. Miriam became the first woman assigned full responsibility to both produce and write the specials, in which she directed many notable actors in voiceover narration, including Christopher Plummer and Theodore Bikel.

Miriam's bequest will provide financial aid through scholarships for undergraduates and merit-based fellowships for graduate students studying theater.

"My success grew out of my acting and writing, much of which took place at UC Santa Barbara," said Miriam. "I want to make it possible for people who need the help to go to school."

"Miriam is a great role model for aspiring performers, not only through her illustrious career but also in her commitment to giving back," said Irwin Appel, department chair. "Her generous bequest will support creative self-expression, critical thinking and excellence in the exciting work of undergraduate and graduate students in both theater and dance. Thanks to Miriam's magnanimous financial support, students will be freer to pursue careers as actors, dancers, directors, choreographers, designers, scholars and writers."

"I had a scholarship at UC Santa Barbara for three out of the four years," said Miriam. "I needed it and was happy to have the support. I always thought that if I was able to, I'd like to do the same thing."

Student-Athlete to Coach to Supporter

Bob Gary '60,'67 has a long history of supporting UCSB aquatics



Bob Gary '60,'67 received both his bachelor's and master's degrees from UC Santa Barbara in physical education. As an alumnus and assistant coach, he helped lead the UCSB Men's Swim Team to UC Santa Barbara's first ever NCAA title in 1967. The Garys' charitable gift annuity in support of aquatic sports is an act of gratitude for campus, where Bob's long career in coaching started.

UC Santa Barbara's swimming program began while Bob was a student in the late 1950s. Bob played tennis first, and then switched to swimming and diving. His coaches could always count on him to jump in. When the swim team didn't have enough competitors to allow the final relay team members to rest, the coach asked Bob to buy them time in the pool by swimming slowly. Bob jokes that he still has the slowest breaststroke record on campus.

He found that the Gaucho spirit of collaboration extended beyond sports at UC Santa Barbara.

"We had excellent professors all over campus," said Bob. "If you had a problem or you needed to work on something, they were readily available. I am most grateful for the good education I got at UC Santa Barbara."

Bob received more than an education on campus. When he was a student, two years of ROTC training was required for men and two additional years led to a commission as a second lieutenant. He was stationed in Germany after graduation.

After his service, Bob returned to Santa Barbara to pursue a master's degree in physical education, taught classes, and became an assistant swim and assistant diving coach. It was here that his 30-year career as a teacher and coach at the college level began. Bob's support will help UC Santa Barbara swimmers and divers compete at their highest potential.

"Donor support means the world to our men's and women's swim team," said Daniel Marella '22. "As a program that isn't fully funded, the swim team appreciates that philanthropy helps us get to the next level. Your generosity allows student-athletes to get more equipment, nicer facilities, and for our team to have a world class experience. We are so grateful!"

Bob's charitable gift annuity with UC Santa Barbara allows him to receive a guaranteed income stream for the rest of his life.

"I'm really happy that my wife, Marsha, and I are financially able to donate money to the aquatics programs," said Bob. "I'd like to encourage any UC Santa Barbara graduate who participated in athletics to consider donating money in their will or ahead of time, if they are capable."

Planning for the Future

Paul Wack helps students enter the planning field



At a recent UCSB Environmental Studies Program event, a presenter asked, “How many people here had Paul Wack as an instructor?” Nearly the entire audience stood. Paul Wack taught his first environmental studies class at UC Santa Barbara in 1978. In his 34 years of teaching, he inspired generations of leaders. Paul’s estate gift will be added to the endowed fund he created to support students in environmental studies.

When Paul first engaged with UC Santa Barbara’s Environmental Studies Program, he was assistant planning director of the county. Over the years, he met students through the internships he sponsored and the guest lectures he taught for colleagues. He helped form the environmental studies planning concentration at UC Santa Barbara and ran the senior thesis program as an academic advisor.

“In that role, I had a chance to expand my understanding of the environment because I was getting all these different perspectives,” said Paul. “I grew with the Environmental Studies Program as the definition of the environment expanded.”

Paul estimates that he has taught 20,000 environmental studies students and aspiring planners at UC Santa Barbara, Cal Poly San Luis Obispo, and Sonoma State.

He is passionate about encouraging students to bring the diversity of their experience to the field. One project he assigned asked students to design a map of their neighborhoods. Students taught Paul about their communities, and Paul gave them planning concepts to apply.

“I made a decision years ago to do a scholarship when I retired,” said Paul, who helped lead fundraising during the Environmental Studies Program’s 50th anniversary in 2020. “I’m going to do what I can to help students who want to pursue a career in planning. If someone has that fire in their belly, this little scholarship could help.”

The scholarship is a way for Paul to continue his impact on UC Santa Barbara and the field of planning.

“The courses Paul taught on planning — how to design functional communities that merge people with their environment — have been central to the environmental studies program for decades,” said Professor Josh Schimel. “His classes, combined with his personal charm, humor, and magnetism, have inspired thousands of students. Every student who took one of his classes gained a deeper appreciation for the value of careful and thoughtful local planning in building sustainable societies. Many of his students were so deeply inspired that they chose to pursue careers in planning.”

Over a long career, Paul has worked with many former students as peers representing the city or county on projects or consulting with various jurisdictions. Many of those early students are now planning their own UC Santa Barbara legacies in honor of Paul.

“As a planner, you have to have hope for the future,” said Paul, citing an Iroquois principle that the decisions we make today should result in a sustainable world for seven generations. “If there’s no future, there’s no planning.”

Sports as Safe Haven

Professor Jenni Sorkin and Cheri Owen help student-athletes



As a UC Santa Barbara professor in the Department of the History of Art & Architecture, Jenni is committed to furthering women in the academy, including sports. Her wife, Cheri, is a former powerlifter and strongwoman competitor who grew up playing basketball. The endowed scholarships they have created in support of UCSB Athletics will help student-athletes compete while balancing rigorous academic work.

"I end up with a lot of athletes in my classes, especially in my lower-division survey courses," said Jenni. "Those large classes can be a student's first humanities course, and the student-athletes must manage their time in a different and more intense way because they travel and compete."

Philanthropy helps student-athletes be their best selves in the classroom and on the field of play. It can also provide structure and direction, and that support system is important to Jenni and Cheri.

"I grew up in foster homes, and sports was a way for me to function in an unknown world," said Cheri. "When there are so many unknowns in society, a lot of kids can count on sports."

Cheri continues to find a safe haven in UCSB Athletics.

"Being blind, I can listen to games: I don't have to see them," said Cheri. "When I show up to a game with my guide dog, I know people are there for me, people I trust. I want UC Santa Barbara to know that what they do in the present is valued for the future."

Jenni and Cheri want to help all student-athletes excel, especially women and competitors in underfunded sports. Their two future endowment funds, created through a bequest in their estate plans, will support UC Santa Barbara student-athletes with the greatest financial need, focusing on women's cross-country, women's tennis, softball, women's soccer, and women's aquatic sports.

The couple is familiar with the dilemma busy student-athletes can face: working part-time jobs while studying hard, sometimes in living situations that aren't conducive to success. To these student-athletes, donor support is an opportunity to focus on what matters most.

"We are so honored by the legacy that Cheri and Jenni will be leaving at UCSB Athletics," said John McCutcheon, director of Intercollegiate Athletics. "This planned gift commitment that will live on in perpetuity through endowed scholarship support will change the lives of so many future Gauchos and will have an immeasurable positive impact on young women for years to come."

"We're going to be at UC Santa Barbara for a really long time, and we've received so much from this community," said Cheri. "We want to give back to the culture of sports and to education."

A Historic Legacy

An endowed fellowship in honor of readers and writers



In 1962, Sears McGee left for Cambridge on a scholarship as an aspiring lawyer. He returned fascinated by early modern European history and earned fellowships that supported all seven years of graduate school at Yale. Through his extensive studies, Sears recognized how powerful a legacy can be. Sears and his wife, Marni, have created their own through a planned gift commitment to endow the Mary Beth McGee Fellowship for graduate students in the UC Santa Barbara Department of History.

“When I was at Yale, fellowships that had been set up a century ago were still supporting people like me,” said Sears, now professor emeritus. “Legacy, from our point of view, is to do everything we can to be a valuable component of the history department’s support base. We’re going to be around for a long time, in that sense.” By naming UC Santa Barbara as a beneficiary of both a retirement plan and a living trust, the McGees have established their own way of supporting graduate students of the future.

The McGee family arrived at UC Santa Barbara in 1971. Sears taught history on campus for 47 years, six of which he served as department chair. He helped launch The UCSB History Associates, created in 1987 with the dual purpose of uniting interested community members with faculty and raising money to support graduate students. As Sears neared retirement, the McGees decided to continue their deep involvement in the Department of History by endowing a fellowship in honor of Sears’s late mother, Mary Beth, who inspired his love of reading.

“Marni and I are both writers who love words and take the writing process very seriously, and my mother was the same way,” said Sears. “One of the particularly enjoyable parts of our marriage is the time we spend writing and talking about reading. To enable others to do that as time goes on is special.”

Marni is an author who has published 20 picture books for young children, many of which have also appeared in foreign language editions. One of her recent picture books is “Winston the Book Wolf,” about a wolf who loves words so much that he eats books.

“I’ve had people tell me that their children took certain picture books of mine off to college with them because they were comforting,” said Marni. “In a very personal way, the idea of staying involved [in education] is important to us.”

Sixth-year Ph.D. student Elizabeth Schmidt received the first Mary Beth McGee Fellowship in 2021. The Mary Beth McGee Fellowship will help fund a research trip to England, where Elizabeth will visit national archives and universities to examine the political, economic, and culinary relationship between Philadelphia and Kingston, Jamaica. This fellowship will help Elizabeth make up for the research year she lost during COVID-19 by allowing her to focus on writing rather than teaching.

“Sears and Marni have really been advocates for the history department at UC Santa Barbara,” said Elizabeth. “That kind of support means a lot.”

Philanthropy Helps Students Excel

Many donors choose to support scholarships and fellowships through legacy commitments. Here, five students share how philanthropy has impacted their education.



Ebelechukwu Veronica Eseka '21, B.A., Sociology

UC Santa Barbara was my blessing as I was offered admission as a Promise Scholar with my tuition and fees covered. There are so many marginalized students who can benefit from a proactive program that incorporates high impact practices to support underserved students. I am a firm believer in community support. I know without the family I found here, I would not be receiving The Thomas Moore Storke Award, because though I am dedicated and hardworking, I could not have done this alone. I hope that I can bless future generations just like you all have been a blessing in my life.

Himanshu Kumar '22, B.A., Computer Science

I am extremely grateful and happy to receive a scholarship. This will allow me to give more relief to my parents and take away some of their financial burden. This is a tremendous help for me to get closer to my goal of being the first member of my family to obtain a college degree and then becoming a software developer. It really means a lot to me and I cannot thank you enough! Thank you for believing in me and helping me.

Ashley Hicke '22, B.S., Biological Sciences

Receiving a scholarship means that I have the ability to continue my educational career without fear of financial insecurity. This scholarship impacts my experience at UC Santa Barbara by allowing me to devote more of my time to my academic and career goals. I feel positively influenced to continue on my current path, hopefully leading me to a bright future. This is definitely an incentive for me to keep aspiring to complete my goals and dreams.

Alexa Kerr '21, B.A., Environmental Studies

Being an undergraduate researcher at Coal Oil Point Reserve has given me valuable professional experience, research skills, and an avenue to explore my scientific curiosity in this incredible natural space. It has been one of the most positive formative experiences in my time at UC Santa Barbara, and I am truly grateful to have been afforded this opportunity through the generosity of our donors.

Ruqayyah Mansour, Doctoral Student, Education

Education has the ability to make change, provide opportunity, and uplift individuals, their families, and communities. It is because of this that I have consistently worked in educational spaces. I am most passionate about homeless educational advocacy and providing homeless students with the resources they need. Thank you for your very kind support of my fellowship.

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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Dr. Güenter and June* Ahlers
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Pat '57 and Bill* Altman
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 Dean W.* '51 and Barbara F.* '55 Spooner
 Judith Cosdon Stapelmann '63,'65 and
 Jack Stapelmann
 Katie Stivers '83
 Tom and Heather Sturgess

Ursula S. Szeles '10
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 John* and Carolyn H.* '37 Wack
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 Vanessa Naranjo Walker '09
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*Deceased

H = Honorary Alumni

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 \$250,000. 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





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