

# Restoring the Past – Building the Future Campaign Update



Barton Academy Foundation

Fall Newsletter, 2018

## Historic Barton Academy Sees Bright Future

Since 2012, a group of concerned citizens has been working with Mobile County Public Schools (MCPSS) to transform Barton Academy, the state's first public school, from a deteriorating three-story behemoth at 400 Government Street to its former use and beauty as a public school symbolizing Mobile's commitment to public education. The project is also seen as a significant engine for revitalizing the area's economy and bringing jobs – both temporary and permanent – to Downtown Mobile.

Built in 1836, Barton Academy stood as a place where what went on inside was of great importance to Mobile. Thousands of students were educated there, and hundreds, if not thousands, will be again as early as the summer of 2020.

Originally, the Barton Academy Foundation and MCPSS announced plans to restore the building and establish the Barton Academy of Advanced World Studies for grades 6-12. Showing their commitment to this project, MCPSS spent \$4.2 million in 2015-6 to completely restore the exterior, bringing the building to current, hurricane-resistant standards. The Barton Academy Foundation then pledged to raise \$10.1 million to restore the interior of the building and replace the 1970s era office spaces with state-of-the-art classroom spaces.

In early 2017, MCPSS decided that Barton Academy for Advanced World Studies could best serve students in grades 6-9, preparing them to attend one of Mobile's specialty high schools. BAAWS will draw top-notch students from across the county, not just from one feeder school or zone, and will provide a once-in-a-lifetime opportunity for local public-school students, 75% of whom come from extremely-low to moderate income families, to receive an education equal to that of local private schools.

Elizabeth Stevens, CEO of Downtown Mobile Alliance and president of the Board of the Barton Academy Foundation, adds, "Downtown Mobile, with its growing residential population, will benefit from a school of this caliber. More than 600 new residential units will have been added to downtown between 2016 and 2020. A revitalized Barton Academy will be a major draw for people looking for an urban lifestyle. Similarly, we expect strong growth in development of currently vacant properties near the school."

Stevens reports that the *Restoring the Past – Building the Future* Campaign is close to 60% of its goal and hopes Mobile's citizens will step forward to ensure its success. To discuss a gift, call Elizabeth at 251-434-8498.



## Honor Your Ancestors with a Gift to Barton Academy

Naming a room or space within Barton Academy for Advanced World Studies or a section of the original cast iron fencing is an excellent way to ensure that your family name remains a part of Mobile's history. For as little as \$1,000, you can have your name or the name of a family member engraved on a permanent plaque.

Naming opportunities range from \$10,000 (8' fence section/\$2,000 per year for 5 years) to \$1,000,000 (library/resource center). Other options include classroom spaces at \$25,000 (\$5000 per year payable over 5 years) and science labs at \$250,000.

The complete list of remaining naming opportunities is available online at [www.bartonacademy.org](http://www.bartonacademy.org).





## Gift of Appreciated Stock Proves Win-Win Situation for Barton and Donor

Elizabeth "Betsy" String grew up in San Francisco and was educated in Philadelphia. But having lived in Mobile for much of her adult life, she feels a strong tie to Mobile and to its future. "I think a restored Barton Academy will add great energy to the Downtown area," she said. "How could one not support that?"

For the past couple years, through her friendship with one of the Barton Academy Foundation directors, she has followed the progress of the *Restoring the Past – Building the Future* Campaign. And she had made a gift when the Campaign first began. But it wasn't until she received a letter stating that she could make a gift to the project of appreciated stock that she decided to step forward with a very generous gift. Betsy simply notified her stockbroker that she wanted to make the gift, and the rest was handled for her. Betsy will be able to deduct the gift on her 2018 tax return and not pay taxes on any capital gain. The deduction is equal to the stock's current market value, not the original cost.

Campaign Director Linda Montgomery will be glad to discuss how you can help the campaign with a gift of appreciated stock, real estate, retirement funds, bequest or other non-cash instrument and can be reached at [Lmontgomery52474@gmail.com](mailto:Lmontgomery52474@gmail.com) or 251-434-8498.

# Holmes & Holmes Architects Design New Interior of Barton

Nicholas H. Holmes, III of Holmes & Holmes Architects, has been hired by Mobile County Public Schools to develop plans for the three floors of classrooms and cafeteria in historic Barton Academy. The anticipated construction cost is \$8,994,900, although savings may be realized by using some existing walls.

"This is a challenge that I gladly accepted, partly because of my father's involvement with the school during a prior phase of its history," Nick said. When Barton Academy became the central offices of MCPSS in the 1960s and early 1970s, Nick's father, through March and Holmes, Architects, worked on the design for the office space and oversaw the construction. "Because of his work at Barton, we are able to refer back to original design documents when creating the new spaces for the school."

Barton Academy has a total of 18,000+ square feet of classroom space over its three floors. New plans call for the first floor of the complex to

house a large library/resource center and physical education space as well as a reception area with historic exhibits, administrative offices, counselors' offices, faculty lounge, medical office and cafeteria. The second floor will house the original wood-paneled Board Room, the superintendent's office, computer labs, and numerous classrooms. Science labs, a STEM lab, and music and art rooms and support spaces will fill the third floor.

Holmes & Holmes Architects have submitted schematics and preliminary drawings to MCPSS and the State of Alabama Department of Finance Division of Construction and have received approval. MCPSS Facilities Contract Administrator Bill Hines is working closely with Nick and his staff on the plans.

Barton Academy Foundation appreciates the support of the Alabama Power Foundation and the Ben May Charitable Trust for providing funding for this phase of the restoration.



The Board of Directors of the Barton Academy Foundation are shown above. Back row, left to right: Raymond Bell, Nick Holmes, Carolyn Lee Taylor, former MCPSS Superintendent Martha Peek, and Corporate Chairman Schley Rutherford. Front row, left to right: Jaime Betze, Allan Gustin, Secretary/Treasurer Denise Browning, Stephen Carter, Campaign Chairman John Peebles. Front row: Foundation President Elizabeth Stevens. Inset photo: Shayla Beaco and Karen Atchison.

# Funding Anticipated from Historic and New Markets Tax Credits

In Portland, Maine, Baxter Academies, a charter school with a focus on science, technology, engineering and math, is renovating a 32,000 square foot space with the help of a \$4.6 million New Markets Tax Credit.

Similarly, in hopes of receiving several million toward a total goal of \$10.1 million, members of the Barton Academy Foundation Board have been meeting with professionals to guide them through the process of applying for New Markets Tax Credits [NMTC], Alabama Historic Rehabilitation Tax Credits and Federal Historic Preservation Tax Incentives.

The goal of NMTC is to spur business and real estate investment in low-income communities of the United States via a federal tax credit. The program is administered by the U.S. Treasury Department's Community Development Financial Institutions Fund and allocated by local Community Development Entities (CDEs) across the United States.

The 2017 Alabama Historic

Rehabilitation Tax Credit is a 25% refundable tax credit available for private homeowners and owners of commercial properties who substantially rehabilitate historic properties that are listed in or eligible for the National Register of Historic Places and are 60 years old or older. The tax credit provides jobs, increases the tax base, and revitalizes existing buildings and infrastructure, while preserving and rehabilitating Alabama's historic properties.

The Federal Historic Preservation Tax Incentives program encourages private sector investment in the rehabilitation and re-use of income-producing historic buildings by offering a 20% tax credit for the rehabilitation of qualified buildings. Established in 1976, the federal historic tax credit program is also a significant financial incentive for the revitalization of historic downtown areas. The National Park Service and the IRS administer the program in partnership with state historic preservation offices.

## BAF Receives *It Starts with Us* Award

Each year, Mobile County Public Schools recognizes outstanding teachers, students and business and community partners at the *It Starts with Us Awards Ceremony*. In May, the Barton Academy Foundation Board received the Community Engagement Award based on the Foundation's success in raising funds to restore Barton Academy.

### Double Your Contribution

The pledge from The Ben May Charitable Trust is a challenge grant to encourage contributions by matching donors' gifts, making it possible to double the effect of your gift. And multi-year pledges are accepted.

To make a gift using PayPal, simply visit [www.bartonacademy.org](http://www.bartonacademy.org) and click on "Contribute." You may also mail a check to **Barton Academy Foundation, P. O. Box 571, Mobile, AL 36601**. All gifts are tax-deductible to the extent allowed by the IRS.

## In support of the *Restoring the Past – Building the Future Campaign*, I/we wish to make the following commitment:

Donor Information (please print):

(Circle one) Mr. and Mrs. Mr. Mrs. Ms. Dr. Other \_\_\_\_\_

Name(s) \_\_\_\_\_

Name(s) as you prefer to be listed in publications\*\* \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_

Preferred Telephone \_\_\_\_\_

Signature(s) \_\_\_\_\_

- ☐ \$1,000,000 To name the Library/Digital Learning Center  
☐ \$500,000 To name the Collaborative Learning Tech Lab  
☐ \$250,000 To name a computer lab, fine arts studio, or indoor activity studio  
☐ \$100,000 To name the principal's office, Board Room, Entry Hall/Historic Exhibit, Grotto/Outdoor Meeting area, or Govt. St. Gate Entrance  
☐ \$50,000 To name a staff office, nurse's office, first aid room, vault, or gate entrance  
☐ \$25,000 To name a classroom  
☐ \$10,000 To name 8' section of wrought iron fencing  
☐ \$5,000 1836 Society  
☐ \$2,500 Founders Society  
☐ \$1,000 Listing on donor plaque  
☐ \$500 ☐ \$250 ☐ \$100 ☐ Other \$ \_\_\_\_\_

I/we will pay my/our pledge over \_\_\_\_ years. (5 years maximum, please)

As an initial payment on this pledge, I/we are enclosing: \$ \_\_\_\_\_

I/We intend to make scheduled payments beginning \_\_\_\_\_ via: (month/year)

☐ Check ☐ Stock\* ☐ Other\* ☐ Credit card through [www.bartonacademy.org](http://www.bartonacademy.org).

\*Donors who wish to make pledge payments via stock or other methods will receive further instructions from the Barton Academy Foundation Campaign Office.

Please send pledge reminders: ☐ Annually ☐ Semi-Annually ☐ Quarterly

\*\* ☐ I/we wish to remain anonymous. ☐ Please contact me about including the Barton Academy Foundation in my will or trust.





# Gift from Daniel Foundation Pushes Campaign over \$3.2 Million Mark

The Board of Directors of the Barton Academy Foundation is pleased to announce that the *Restoring the Past – Building the Future* Campaign has raised more than \$3.2 million in gifts and pledges. \$1 million of this amount has been raised since January 2018. Most recently, the Daniel Foundation of Alabama, located in Birmingham, pledged \$200,000 through their Arts, Culture and Community Assets priority area. According to Daniel Foundation Executive Director Maria Kennedy, “We hope our funding serves as encouragement for other funding.”

Other major gifts since the beginning of 2018 include an additional grant of \$150,000 from the Dr. Monte L. Moorer Foundation, bringing their total pledge to \$350,000; a pledge/gift of \$250,000 from the J.L. Bedsole Foundation, and a gift from the Crampton Trust of \$125,000. Previous major commitments include \$1.27 million from The Ben May Charitable Trust, \$500,000 from the Hearin-Chandler Foundation, and an increased pledge from the Laura Lee Pattillo

Norquist Foundation, bringing their total pledge to \$100,000.

Recently Bestor Ward, chairman of the J.L. Bedsole Foundation’s Distribution Committee, was asked why they feel it’s important to support the *Restoring the Past- Building the Future* Campaign. He replied, “The J. L. Bedsole Foundation has always placed a high priority on investments in education, whether from our post-secondary scholarship program, The J. L. Bedsole Scholars, or to innovative K-12 programming and capital campaigns for campus infrastructure. It has been well documented that the best solution to civic problems is a well-educated community. The J.L. Bedsole Foundation also places a high priority on Community and Economic Development, and we believe the restoration of Barton Academy to a school for Advanced World Studies will be a valuable addition to the ongoing redevelopment of downtown Mobile. It will also assist in the revitalization of nearby neighborhoods and restoring the character of this historic area.”