

Community MATTERS

FALL 2019



PASADENA COMMUNITY
FOUNDATION

PCF, ARROYO CAPITAL, AND MATH ACADEMY: PARTNERS FOR LOCAL EDUCATION

At Arroyo Capital Management, giving back to the community is integral to the company's culture. PCF helped Arroyo Capital build a long-term charitable partnership with PUSD's Math Academy program that reflects their company's passion for merit, motivation, and innovation.

When the Arroyo Capital team visited the Math Academy classroom and met program founders Jason and Sandy Roberts, they knew they had found community leaders whose enthusiasm matched their own. Arroyo Capital became a long-term supporter of Math Academy, contributing \$500,000 in the past three years, and managing partner Christopher Bragg joined their Board of Advisors.

Math Academy, continued on page 4



Justin Yorke and John McGrain of Arroyo Capital, Jennifer DeVoll, Jason Roberts, PUSD Superintendent Brian McDonald, Sandy Roberts, Chris Bragg of Arroyo Capital, and Patrick Conyers of PEF

New Member of the PCF Board of Directors: Scott Christopher



PCF welcomes Mr. Scott Christopher to the Foundation's Board of Directors. Scott is a managing director at J.P. Morgan, where he has worked for 29 years.

In addition to his financial expertise, Scott brings to the PCF Board a deep knowledge of the role of community foundations,

having served for many years as a member of the committee advising the Warren Christopher Scholarship Fund, a fund of the California Community Foundation.

The scholarship program was created in honor of Scott's father, Warren Christopher, the former U.S. Secretary of State. It provides college scholarships every year to 15 outstanding tenth grade students from the Los Angeles Unified School District, all from low-income backgrounds and facing profound challenges in their schools and communities.

In addition to his work with the Christopher Scholars, Scott served on the Board of Directors of Polytechnic School for five years, and has been a member of Poly's investment committee for 20 years.

Scott and his wife Allison live in La Cañada, where they raised their two children, Andrew, 28, and Lauren, 25. He holds a master's degree from the John F. Kennedy School of Government at Harvard University, and a bachelor's degree from UC Santa Barbara. In his spare time, you will find Scott outside, never too far from the water, surfing, paddle boarding, and sailing.

HONORING PASADENA'S NONPROFIT LEADERS

On Thursday, November 14, Pasadena's community leaders joined PCF's donors, grantees, and friends at the annual Local Heroes breakfast. During the program, PCF's staff and Board members honored the 2019 PCF grantees—local agencies and programs that support education, youth services, arts & culture, environment, health, special populations, homelessness and affordable housing, and economic development.

“The Local Heroes breakfast gives us the opportunity to thank nonprofit leaders for their tireless efforts on behalf of our community, and use the Foundation’s voice to share their accomplishments with a broad audience,” said Margaret Mgrublian, PCF’s incoming president of the Board of Directors.

| 1 | PCF’s Mariver Copeland and Margaret Mgrublian with the team from East West Bank: Rita Verita, Roger Huang, Richard Kim, Lei-Lei Chen, and Kevin Wang



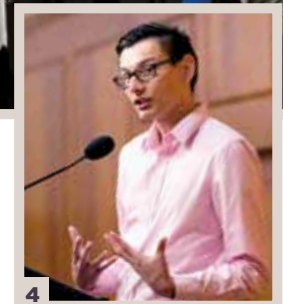
| 2 | Jim Osterling, Betty Tsang, PCF Scholars Kevin Morales and Ramon Cano Cristobal, Pasadena City College President Erika Edrijonas, College Access Plan Executive Director Mo Hyman, and PCF Scholars program consultant Kate Clavijo



| 3 | Vice Mayor Tyron Hampton with John McAustin and Nicholas Rodriguez, Assistant City Manager



| 4 | Jonathan Muñoz-Proulx, Director of Cultural Programming at A Noise Within



A FOND FAREWELL

As 2019 wraps up, so does Fran Scoble’s term on PCF’s Board of Directors. As a member of the Board for 11 years, and its president for the past two years, Fran’s thoughtful leadership has guided the Foundation through a period of significant growth, building our capacity to serve Pasadena’s donors and nonprofits. I wish to express our deep gratitude to Fran for her years of service, collaboration, wise counsel, and inimitable sense of humor. Thank you for your many contributions to PCF and the Pasadena community!

~ Jennifer DeVoll, President & CEO



Pasadena Mayor Terry Tornek, Jennifer DeVoll, Fran Scoble

2019 LOCAL HEROES GRANTEES

EDUCATION

Altadena Library Foundation	\$15,000
Carnegie Observatories	\$14,328
College Access Plan	\$20,000
Math Academy*	\$60,000
Partnership for Success!	\$20,000
Pasadena City College Foundation	\$19,533
Pasadena Education Network	\$3,229
Pasadena Educational Foundation	\$30,000
Reading Partners	\$25,000
Stars	\$25,000
STEAM:CODERS	\$12,600

SCHOLARSHIP FUNDS

College Women's Club of Pasadena Scholarship Foundation	\$41,000
Bonnie Baha Memorial Scholarship	\$10,000

PCF SCHOLARS

College Access Plan	\$30,000
Pasadena City College Foundation	\$24,000

LEARNING DIFFERENCES

Institute for the Redesign of Learning	\$14,085
The Marianne Frostig Center for Educational Therapy	\$19,125

FAMILIES AT RISK

Foothill Family Service	\$25,000
Peace Over Violence	\$5,000

VISTA NOVA GRANTS FOR THE BLIND & VISUALLY IMPAIRED

Academy of Music for the Blind	\$10,000
Braille Institute of America, Inc.	\$10,000
Eastside Center for the Blind	\$6,500

SENIOR

Armenian Relief Society of Western USA, Social Services	\$10,000
Pacific Clinics	\$10,000
Pasadena Meals on Wheels, Inc.	\$10,000
Pasadena Senior Center	\$10,000
Pasadena Village	\$10,000

YOUTH

Adelante Youth Alliance	\$15,446
Boys & Girls Clubs of Pasadena	\$9,250
Kidspace Children's Museum	\$20,000
First Tee of Greater Pasadena	\$5,500



Mel Cohen with Pasadena Police Chief John Perez

ARTS & CULTURE

A Noise Within	\$24,730
Armory Center for the Arts	\$10,000
Boston Court Pasadena	\$18,015
Pasadena Community Orchestra	\$3,767
Pasadena Conservatory of Music	\$22,900
Pasadena Playhouse State Theater of California	\$25,000
Pasadena Symphony Association	\$20,000
Scholarship Audition Performance Preparatory Academy (SAPPA)	\$2,500

ROWE & GAYLE GIESEN TRUST

Armory Center for the Arts	\$6,000
Art Center College of Design	\$6,000
Pasadena Educational Foundation	\$6,000
Remainders Creative Reuse	\$3,000
Side Street Projects	\$6,000
Wisdom Arts Laboratory	\$6,000

ENVIRONMENT

Arlington Garden in Pasadena	\$5,000
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REBUILDING LIVES & JOBS

City of Pasadena, MASH	\$25,000
Flintridge Center	\$3,000

PASADENA PUBLIC LIBRARY FOUNDATION

Restoration Projects	\$125,000
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PASADENA ASSISTANCE FUND

Armenian Relief Society	\$25,000
Armory Center for the Arts	\$25,000

CENSUS 2020

City of Pasadena	\$20,000
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HEALTH

Cancer Support Community	\$4,529
Pasadena Convalescent Aid Society (CAS)	\$25,000
Grandview Foundation	\$21,991
Walter Hoving Home**	\$17,650
Young & Healthy	\$21,577

PASADENA CHILD HEALTH FOUNDATION

AbilityFirst	\$15,000
Boys & Girls Club of Pasadena	\$10,000
Families Forward Learning Center	\$22,500
Elizabeth House	\$20,000
Flintridge Center	\$10,000
Foothill Family Service	\$22,500
Girls on the Run of Los Angeles County	\$20,000
Planned Parenthood Pasadena & San Gabriel Valley	\$22,500
Rose Bowl Aquatics Center	\$20,000
Union Station Homeless Services	\$15,000
Young & Healthy	\$22,500

HOMELESSNESS & AFFORDABLE HOUSING

Door of Hope	\$25,000
Foothill Unity Center**	\$25,000
Heritage Housing Partners	\$25,000
San Gabriel Valley Habitat for Humanity	\$25,000
Union Station Homeless Services	\$20,000

* Funded by Arroyo Capital Management
 ** Funded in part by the Thomas Harris Family Foundation

PCF Professional Advisor HANS GUSTAFSSON

Hans joins PCF's Professional Advisors group with more than 20 years of experience serving as a tax advisor to privately held businesses and their individual owners. As a tax partner with accounting firm Holthouse, Carlin & Van Trigt, LLP Hans works with clients to address complex tax requirements in all phases of the business cycle.



Hans was born in Stockholm, Sweden, and grew up across the world, as his father's work took the family to Italy, Zambia, and Bahrain. He arrived in Southern California with a scholarship to attend Whittier College, and never left. Hans holds a master of business taxation from the University of Southern California, and a master's in accountancy from California State University, Los Angeles. He previously served on the Los Angeles Economic Development Council Green Energy Committee and as a board member of Junior Achievement of Southern California. Hans lives in Arcadia with his wife, and two daughters, and still loves to travel.

New Staff Member AI-HSIEN "ALLIE" CARREON

PCF welcomes Administrative Associate, Allie Carreon. Allie joined PCF in September 2019 to provide grants administration, executive support, and office management.

Allie was born in Tainan, Taiwan, and immigrated to the United States with her family when she was two years old. She grew up in British Columbia and Orange County, California, and attended Pomona College. Allie majored in art, but loved public sector work as well, and received a Coro Fellowship in Public Affairs following college. After her fellowship, Allie worked for the Coro Southern California program, and held positions at the City of Los Angeles Cultural Affairs Department, Asia Society, and California Community Foundation.

Allie lives in Highland Park with her husband, Edward Carreon, a professional photographer, and their daughter, Sabine (16). Sabine attends Polytechnic High School, and is an accomplished violinist who plays with Harmony Project Youth Orchestra. They love to travel, hike, and explore new restaurants in their neighborhood.



Math Academy, continued from page 1

Developed by Jason Roberts, the mathematician who wrote the original code for Uber, and Sandy Roberts, a University of Chicago economics major, Math Academy identifies students with an aptitude for math and encourages them to excel with innovative learning models and university-level teachers.

Starting in sixth grade, Math Academy students complete high school math in middle school, and advance to college-level math in high school. With the support of Arroyo Capital, Pasadena Education Foundation, and other funders, Math Academy now operates at four local schools, including its first class at Pasadena High School.



Math Academy students spend most of their class time out of their seats, working at whiteboards around the classroom

Community foundations like PCF are uniquely positioned to facilitate charitable partnerships like these. When companies examine their values and identify the causes and organizations that are meaningful to them, they can build long-term relationships that result in impactful local philanthropy.

"We see so much promise reflected in Math Academy's work," observed Bragg. "Watching a middle school math student fly through AP

Calculus, it's easy to imagine that student, years from now, sitting across the board room table and inspiring us to invest in their latest venture."

YES, VIRGINIA THE FUND REACHED ITS ENDOWMENT GOAL!

For 26 years, the Yes, Virginia Fund, a fund of PCF, has supported children in need in our community at Christmas. Taking its name from the famous 1897 letter from Virginia O’Hanlon to the *New York Sun*, the fund references the newspaper editor’s famous reply of “Yes, Virginia there is a Santa Claus. He exists as certainly as love and generosity...”



This year’s final Classy & Sassy Luncheon and Boutique was held on Wednesday, November 6 at the Altadena Town & Country Club, and honored Diana Rafeedie-Nofal, the longtime chair of the Yes, Virginia Classy & Sassy Luncheon committee.

With the proceeds from this year’s luncheon, the fund reached its endowment goal of \$500,000, and will make its holiday grants to local nonprofit agencies every year, for decades to come. Since 1994, the Yes, Virginia Fund has granted more than \$340,000 to local nonprofit agencies to provide Pasadena’s children with toys, books, gifts, and special experiences during the holidays.



| 1 | Yes, Virginia committee member Jeane Ward and Hazel Salomon-Jimmy
| 2 | Jennifer DeVoll and Diane Rafeedie-Nofal
| 3 | Marita Tavakoli, Alma Smith, Bobbi Moriel

The 2019 Yes, Virginia grantee organizations include:

- Boys & Girls Clubs of Pasadena
- Community Health Alliance of Pasadena
- Door of Hope
- Elizabeth House
- Families Forward Learning Center
- Flintridge Center
- Impact House
- Pasadena Altadena Community Endowment Fund (PACEF) - The Links
- Pasadena Altadena Coalition of Transformative Leaders (PACTL)
- Pacific Child Development Associates
- Treasure Little Children Foundation



PCF's Capital Grant

PCF's Capital Grant Program supports the infrastructure that nonprofit organizations need to carry out their mission, including equipment purchases, construction, and renovation. PCF made 31 Capital Grants in 2019, for projects ranging from new seats for a local theater company to roof repair for a family homeless shelter, and more...

HABITAT FOR HUMANITY

As the affordable housing crisis deepens, San Gabriel Valley (SGV) Habitat for Humanity is building homes right here in Pasadena. Participating families build their homes alongside community volunteers, pay an affordable mortgage, and take homebuyer education, financial literacy, and life skills courses to prepare them for success.



SGV Habitat received a Capital Grant from PCF to help finance the construction of two homes at the corner of Howard Street and Navarro Avenue in Northwest Pasadena. The project is planned in partnership with the City of Pasadena, which has officially selected Habitat to develop the affordable housing units. Since SGV Habitat's inception in 1990, the program has a 100 percent success rate, with no foreclosures or defaults, and all revenue from mortgage payments is reinvested in building and repairing more homes.

INSTITUTE FOR THE REDESIGN OF LEARNING

Westmoreland Academy is one of six programs operated by the Institute for the Redesign of Learning. It serves 100 students with Autism Spectrum Disorders, ranging in age from five to 22 years old, at the Pasadena campus. With an almost 1:1 ratio of students to teachers, Westmoreland offers early childhood intervention, speech and language therapy, and diverse programs designed to meet the needs of each student's Individual Education Plan goals.

Many of Westmoreland's students experience sensory and motor challenges throughout their school day. The agitating effects of sensory processing issues can be relieved with the use of specialized equipment, including swings, foam pits, massage rollers, and weighted vests and blankets for pressure stimulation. A grant from PCF will convert an existing classroom into a sensory guidance and exploration room, providing more students with access to this critical therapy and fostering a sense of healthy, active living and play within each child.



31

in 2019

Program

CITY OF PASADENA MASH

MASH (Municipal Assistance, Solutions, and Hiring) is a unique workforce development initiative operated in partnership with the City of Pasadena. MASH revitalizes neighborhoods and removes blight while training under-skilled and unemployed adults for careers in municipal services. Along with their city training, MASH participants – 80% of whom are from Pasadena and Altadena – receive job coaching, practice interview skills, and accumulate valuable work experience.

MASH's aging vehicles need frequent and expensive repairs, which interrupt services and deplete their budget. MASH received a Capital Grant from PCF to purchase a new work van for reliable transportation to job sites, keeping the program participants engaged in job training opportunities. Upgraded equipment means they can continue to perform repairs and upgrades for homeowners who would not be able to afford those services, contributing to cleaner, healthier neighborhoods.



| 1 | PCF Board and staff members meet the crew at a Pasadena Habitat for Humanity building site with Habitat San Gabriel Valley executive director Mark Van Lue

| 2 | Each student at Westmoreland Academy has an Individual Education Plan, in addition to the school's curriculum

| 3 | Most MASH vehicles are more than 20 years old, and inherited after years of use in other departments



THANK YOU, DIANA AND MARK, FOR "BEING 1" FOR SENIORS IN NEED IN PASADENA!

Diana Schulz and Mark Rice live in La Cañada but seem to spend most of their spare time in Pasadena.

Diana is president of a large division at Internet Brands, a leading online marketing and web solutions company. She is an active supporter of local schools and former board member of the La Cañada Educational Foundation. Diana also serves on the Advisory Board of Claremont McKenna College. After a career in marketing and advertising, Mark works as a pro bono consultant to a number of Pasadena nonprofits, assisting with marketing, communications, and website development. He is a member of the Board of Directors at Grandview Foundation, which provides drug and alcohol addiction treatment, and the Convalescent Aid Society, which provides free loans of quality medical equipment.

"We enjoy giving back to the community, and PCF is the perfect way to do that," said Mark. "They are the experts and truly understand local needs." Diana and Mark chose to direct their endowment fund towards the significant needs of seniors, particularly those who live alone in Pasadena.

Are you interested in leaving a permanent legacy for the community you love? You too can "Be 1" for Pasadena with the gift of endowment. Contact Johanna Clark at (626) 796-2097 for more information on PCF's Endowment Builders program.

FRIENDS & FELLOWS APPEAL



Fran Scoble & Wendy Munger
Friends & Fellows Campaign Co-Chairs

Please join us and make your 2019 Friends & Fellows gift today. An annual gift to PCF strengthens our capacity to build hometown legacies and enrich the lives of the people of Pasadena through:



**More than \$1 million
in responsive grants
every year**



**Endowment building that
funds organizations and
causes in perpetuity**



**Donor services and
operating support that
maximize the impact of
local philanthropy**

You may enclose a check in the remittance envelope, transfer your gift from your donor advised fund, or visit our website at www.pasadenacf.org to give online.

Thank you for your generosity, and we wish you a happy and prosperous 2020!



KEEP AN EYE ON YOUR IRA: MAXIMIZE THE TAX BENEFITS AND CHARITABLE GIVING POTENTIAL OF YOUR IRA

Individuals age 70 ½ or older can make gifts of up to \$100,000 directly from their IRA to charity. Your gift will satisfy your required minimum distribution (RMD) and you will not have to pay federal income tax on the amount given from your IRA to charity. Making a rollover to a charity lowers your modified adjusted gross income. If you have higher income, the law requires an adjustment to your monthly Medicare Part B (medical insurance) and Medicare prescription drug coverage premiums. Higher-income beneficiaries pay higher premiums for Part B and prescription drug coverage. Therefore, a lower modified adjusted gross income could lower the above premiums.

It is important to note:

- The IRS does not allow IRA gifts to donor advised funds.
- IRA charitable rollover gifts do not qualify for a charitable deduction but there is still a tax benefit, since the distribution is not included as income and therefore lowers your modified adjusted income.

Charitable rollovers can be made from Roth IRA's. However, since the distributions are tax free, it is better to take the distribution and then make a charitable donation to obtain the tax deduction.

401k, 403b, and pension plans are not eligible for the charitable rollover, but you can roll over the money to an IRA to do a charitable rollover.

Advice from PCF Professional Advisor Elaine Gregory, CPA, Partner at Gregory, Fillas & Buschauer, LLP



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