

REPORT OF GIFTS 2020–2021
Gratitude for Community

From the Head of School



Darryl J. Ford Hon. 1689

HowFar? HowFar! Closer than ever!

In October 2017 in a festively transformed Dooney Field House, I made a fundraising pitch to support Penn Charter's then-new educational Strategic Vision and a campus transformation uniting all three divisions in a pedestrian-friendly Academic Village. The plan called on us to build two new state-of-the-art facilities for student-centered learning and to steward our outdoor campus, ultimately making outdoor learning as central to our educational program as all of the lessons learned inside classrooms, on the stage, and on playing fields and in gyms.

That same night, we celebrated that we had raised \$51 million to support the exciting plans for Penn Charter's future and, because of generous donors, raised the campaign goal from \$65 million to \$75 million. We asked the question, "By the Light of Our Charter How Far Can We See?" and affirmed the answer that we, indeed, could see far in the plans we made and dreams we set for our school. Of course, the 325-year lineage from the school's founding to the present provided both evidence and inspiration that we could fulfill the new vision we set before us. New athletic facilities, support for faculty and staff professional development, increased financial aid for students, and new resources to spur innovation are just a few examples of the results of your generosity.

With the campaign's success, the query **HowFar?** soon became the declarative statement **How Far!** Fueled by transformational gifts and intentions, an ever-growing number of first-time donors, second gifts and increased levels of philanthropy, the campaign goal was raised to \$125 million to fund the two new state-of-the-art educational buildings. The \$45 million William A. Graham IV OPC '58 Athletics & Wellness Center opened this September 2021, and we continue to fundraise for a new lower school, hoping to break ground in the summer of 2022.

This Report of Gifts chronicles the steadfast and incredible support of donors like you. Because of your generosity, **HowFar?** became *How Far!*, and now becomes, *Closer than Ever*.

Indeed, we are closer than ever, and I can't wait to witness—with you—all that Penn Charter is becoming.

Sincerely,

Darryl J. Ford Hon. 1689, P '20

ON THE COVER: Penn Charter's campus transformation advances with completion of the new Graham Athletics & Wellness Center. Members of the Class of 2020 were among the first to tour the building. More photos beginning on page 2.

Development Office 2021–2022

Chief Development Officer

John T. Rogers Hon. 1689, P '99, '00, '04

Assistant Director of Development

Nicole Martz P '22, '24

Senior Development Officer

Christopher Rahill OPC '99, P '34

Director of Stewardship and Special Projects

Stephen A. Bonnie OPC '66

Development Assistant

Denarii Beard OPC '17

Administrative Assistant and Event Coordinator

Shawna Hanley

Director of Advancement Services

Shannon Makhija P '21, '25

Director of Alumni Relations

MaryKate O'Brien OPC '12

Director of the Annual Fund

Emma Rowan

Director of Parent Engagement

Lauren Stabert

Development Associate

Blanca Womack P '20

PENN CHARTER TRUSTEES

Brigitte Addimando P '29, '28, '33

John A. Affleck OPC '64, P '98, '02

Christine B. Angelakis P '11, '13, '18

Richard A. Balderston OPC '69, P '02, '05

Anne Marble Caramanico Hon. 1689, P '07

William B. Carr Jr. OPC '69

Grace Sharples Cooke P '08, '11

Ilana H. Eisenstein OPC '95

David Evans OPC '59

Jane F. Evans Hon. 1689, P '93, '95, '98

Amy E. Gadsden P '23, '27

Mark D. Hecker OPC '99

Paul Hough OPC '77

Teresa A. Nance

Jeffrey A. Reinhold P '12

Benjamin E. Robinson III OPC '82

Robert L. Rosania OPC '82, P '22, '23

W. Scott Simon OPC '78

Gregory Summers OPC '89, P '26, '23

Larry L. Turner P '19, '22

F. John White OPC '65, P '90, '96, '99

Caesar D. Williams Jr. OPC '80, P '15

SENIOR TRUSTEES

George C. Corson OPC '52, P '83

Nelson J. Luria OPC '59

William F. MacDonald Jr. OPC '62, P '05

Edward Zubrow Hon. 1689

REPORT OF GIFTS

CASH RECEIVED, JULY 1, 2020 – JUNE 30, 2021

ANNUAL FUND

Alumni Annual Fund	\$	1,013,273
Parent (Current and OPC Parent) Annual Fund	\$	570,475
Friends Annual Fund	\$	42,821
Grandparent Annual Fund	\$	31,120
Faculty and Staff Annual Fund	\$	68,576
SUBTOTAL	\$	1,726,265

RESTRICTED ANNUAL GIVING

Educational Improvement Tax Credit	\$	1,628,000
Opportunity Scholarship Tax Credit	\$	881,500
Teachers Retirement Contribution	\$	411,035
Other	\$	506,747
SUBTOTAL	\$	3,427,282

TOTAL GIFTS TO CURRENT OPERATIONS	\$	5,153,547
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CAPITAL AND ENDOWMENT

Faculty Endowment	\$	224,274
Scholarship Endowment	\$	2,014,133
Campus Transformation	\$	692,363
Program Excellence	\$	74,625
General Endowment	\$	36,303
Unrestricted	\$	2,344,244
TOTAL CAPITAL AND ENDOWMENT GIFTS	\$	5,385,942

ALL CHARITABLE GIVING	\$	10,539,489
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THIS YEAR, to save money and trees, we published the details of the 2020-21 Report of Gifts online at

penncharter.com/gifts. The material is protected with a password to ensure the privacy of our donors.

To access details about charitable giving at PC enter the password: **stewards**.



BY THE LIGHT OF OUR CHARTER

How far can we see?

Members of the Class of 2020 returned to campus in August to restage milestones lost to the first year of Covid. A tree was dedicated next to the new Graham Athletics & Wellness Center to honor their resilience and recognize that the class will be held strong by its Penn Charter roots.

CAPITAL CAMPAIGN: A STATUS REPORT

CLOSER THAN EVER

Penn Charter's singular investment of time, resources and attention to the **How Far?** campaign is paying off.

"We are so close to realizing our vision of a campus transformation."

Christine Angelakis P '11, '13, '18, a PC trustee and co-chair of the campaign.



The **How Far?** campaign reached a milestone this summer with completion of the Graham Athletics & Wellness Center, a \$45 million state-of-the-art facility that will elevate PC athletics, promote wellness and benefit every member of our community. The Graham follows a series of athletics projects made possible by the campaign, including a baseball complex on the Strawbridge Campus and Maguire Field and the track surrounding it.

Angelakis said that the Graham building promises to bring our community closer together than ever. "The building and landscape were designed to invite the community to gather, and, as it comes together, we can see that the Graham Center will be a campus hub," Angelakis said. "It is fabulous, and students and parents will want to be there."

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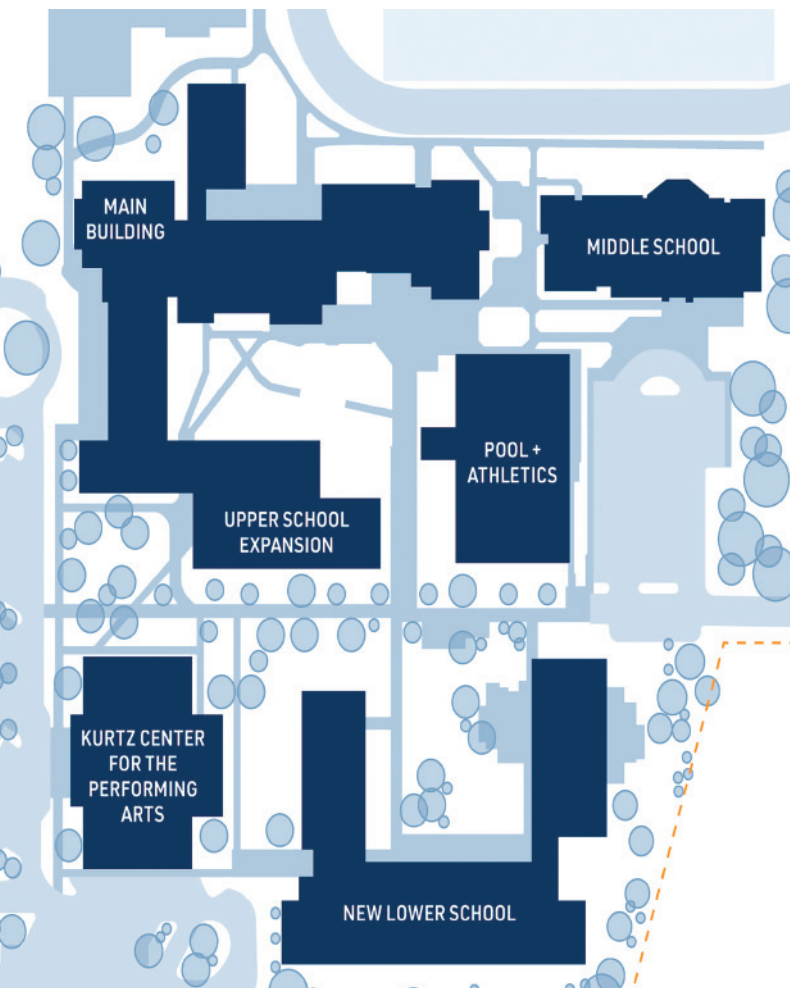


CAMPAIGN STATUS

This progress in the school's campus transformation has been made possible by the generous philanthropy of Penn Charter donors, particularly some loyal OPCs who have made major gifts to the campaign, including second gifts to support construction projects. Since January 2021, new gifts and committed pledge payments have totaled more than \$13 million.

As the deadline for this publication approached, the total raised to date for the **How Far?** campaign exceeded \$105 million.

Jeffrey Reinhold P '12, clerk of the PC Board of Trustees, applauded the school's fundraising efforts. "I am ecstatic with how the campaign has gone. It has helped that the economy and market have rebounded. Still, given the uncertainty of covid, we have made amazing progress. But," Reinhold said, "we still have a ways to go to reach our campaign fundraising goal and build the new lower school."



ACADEMIC VILLAGE

In this final year of the **How Far?** campaign, Penn Charter needs to raise cash for buildings. The campaign has met fundraising goals for curricular innovation, the Annual Fund, financial aid, teacher support and bequests. So the two major capital projects—the Graham and the lower school—are the fundraising priorities.

"These capital projects secure the future of our school," Reinhold said. "We need more gifts."

Penn Charter's 2013 Strategic Vision identified the need for a lower school facility that supports innovative teaching and what neuroscience has taught us about the way children learn. Imagining how that new facility could fit into PC's campus launched a visionary master plan to transform the campus to meet the needs of the school far into the 21st century.

The plan realigns athletics facilities on the eastern side of campus, from the scoreboard on Maguire Field across School House Lane to the Strawbridge Campus. On the other side, the plan calls for the Lower, Middle and Upper Schools to unite in a green, pedestrian-oriented Academic Village.

"Our vision for a campus transformation combines the three divisions in a vibrant Academic Village—a vibrant learning community," said Head of School Darryl J. Ford. "We are not done until we achieve that."



NEW LOWER SCHOOL

Reinhold, Ford and architects for EwingCole — the firm that designed the baseball facility and the Graham — worked this summer with Director of Lower School Marcy Sosa and a group of pre-K to 5 teachers and other colleagues to further a new conceptual design for the building. PC had a conceptual design but the new effort benefits from what faculty have learned recently as they pursued more project-based learning — as well as lessons from the covid experience.

For example, teachers want more access—and quick and easy access—to the outdoors. “We learned during covid,” Ford said, “that each time you take students outdoors their horizons for learning and wellness are enhanced.”

As work continues on design and pre-construction estimates, Ford is reminded that the timeline for the new building depends on philanthropic interest and support.

His plans for the coming academic year include much more time on the road visiting OPCs and friends of the school.

“I don’t want people to be afraid to see me coming,” Ford said with a laugh. “I look forward to meeting with people and explaining how close we are to achieving our vision for a comprehensive learning environment that will become a standard for this century. I look forward to gaining more support to finish this project.”

– Sharon Sexton

To learn how you can support the lower school building project, contact Nicole Martz, assistant director of development, at 215.844.3460 ext. 265 or nmartz@penncharter.com.

A HUB FOR HANDS-ON LEARNING



Lew Somers's service to Penn Charter was carried out "in deep partnership" with his wife, Betty, according to former head of school Earl Ball.

Lewis S. "Lew" Somers III OPC '44 brought a lifelong curiosity for science to the medical technologies businesses he developed and managed throughout his career. He even had an academic grounding in the subject, earning a degree in physics from Williams College. But Somers chafed somewhat against conventional science education, according to his son John F. Somers OPC '78.

"He'd be the first to tell you he wasn't a great academic. He was more of a hands-on guy. He loved to tinker."

So when he wasn't busy running a successful medical device company and raising a family, Lew Somers could often be found fiddling with the elaborate miniature railroad he'd constructed in his basement, or building model aircraft.

During vacations at the family's lake house in Maine, he got a kick out of flying his radio-controlled seaplane, using the water as a runway; in the event of an unsuccessful touchdown, the young John Somers and his siblings would swim out into the lake to recover their father's battered craft. "He called us his personal navy," Somers said with a laugh.

Lew Somers passed away in 2011, but his spirit of curiosity will live on in the science room of Penn Charter's new lower school building, where students will encounter daily the kind of hands-on, self-directed learning he found so gratifying. Made possible through a gift from John and his wife, Kristin, the Lew Somers Science Room will serve as a hub for project-based learning (PBL), a method of student-led education that's become a core feature of PC's Lower School curriculum. PBL empowers children to develop a greater sense of responsibility for their own learning through self-directed assignments, trial and error, and calculated risk-taking. Lower School teachers, trained in the pedagogy of PBL, help guide students and provide support after those inevitable crash landings.

The new science room will also honor Somers's outsized legacy at PC. As a board member of nearly 40 years,

"I believe Lew Somers stands as one of the great board members in the modern history of Penn Charter."

—FORMER HEAD OF SCHOOL EARL J. BALL HON. 1689

clerk for six, Somers helped envision and execute major developments in Penn Charter's culture, curriculum and campus, from the emergence of coeducation to the construction of the Richard B. Fisher Middle School and David L. Kurtz Center for the Performing Arts. He brought to his leadership at PC wisdom gained in his role as president of Extracorporeal Medical Specialties, later Harmac Medical Products.

"Lew had a vision," said Head of School Darryl J. Ford. "He was adamant that we dig a full basement under the Middle School because he wanted us to prepare for a future need. That basement now houses the IdeaLab."

Chief Development Officer John T. Rogers remembers a story of Somers' generosity. Midway through construction of the Kurtz Center, it looked as though it would be necessary to trim costs, and that meant eliminating the stage pit lift. Somers wouldn't hear of it. "Lew said, 'We need the stage lift, and I will cover half and you will call Dick Brown for the other half,'" Rogers recalled. Richard P. Brown Jr. OPC '38, another key PC supporter, thought that was a great idea, and the Kurtz Center got its lift.

"I believe Lew Somers stands as one of the great board members in the modern history of Penn Charter," said former head of school Earl J. Ball Hon. 1689. "He was a key figure in the life of the school for many decades.



John and Lew Somers on the lake in Maine with one of Lew's seaplanes.



John Somers (right), pictured here with brother Lewis "Scot" Somers IV OPC '73, was keynote speaker at Penn Charter's Downtown Reception in 2019.

His observations from his business leadership were extraordinarily helpful to me, and his personal values helped me see clearly through challenging issues."

The Somers Science Room promises to be every bit as innovative as the teaching and learning taking place within its walls. John Somers, who has served as president and CEO of Harmac since 2000, understands better than most the importance of high-quality equipment, and that understanding has inspired his gift, too. "It will be great to bring in new technology that will allow students to be more creative," he said.

Somers remembers how his father believed, "There isn't just one right way to do anything," and how this notion was reinforced through Lew's extensive travels with his wife, Betty. According to Lew, it was less important *how* you did something and more important *that* you did something. It's a lesson that John Somers took to heart, and one that PC's lower schoolers will learn over and over again in their extraordinary new space. **PC**

– Ray Bailey OPC '09

STEWARDING THE PC COMMUNITY

Last spring, as the covid-19 pandemic began to take an economic toll worldwide, Penn Charter acted quickly to develop a plan to keep our community whole.



The Preserving Our Community Fund—PC Fund, for short—was established to provide financial support to current families who were experiencing income loss. Generous donors, most of them Penn Charter trustees and alumni, contributed \$1.2 million so that students did not have to withdraw from Penn Charter because of a disruption in family income.

The plan was a resounding success. John Zurcher, director of financial aid, was able to direct money from the PC Fund to help 87 students remain at Penn Charter.

In some cases, Zurcher said, parents had recently opened a business before the pandemic began, and some already owned a business that was experiencing a downturn. Others were in a manufacturing field for which there were no new orders. A number were furloughed or their work hours were reduced. Some parents were out of work after contracting covid-19, and others had to leave work to care for someone else who had covid.

“Some parents were committed to Penn Charter based on a salary that was no longer there,” Zurcher said. “You can’t stop paying your electric bill or your car loan. School is one thing you *could* cut—but it’s the last thing you’d want to.”

Although a million dollars could not make every member of the PC community whole, Zurcher said, using the fund to keep families at Penn Charter removed “a tremendous financial worry from people.”

While the inspiration for the effort was humanistic and community-minded, the fund turned out to be important from another perspective, too.

Read about the origin of the Preserving Our Community Fund, first published in the Report of Gifts 2019-2020, at penncharter.com/pcfund.



Penn Charter historically has one of the highest rates of students reenrolling annually among peer schools in the Philadelphia region. Often, financial difficulties are a leading reason for families to choose another school, and the economic downturn from the pandemic caused significant difficulties for many families. Making sure students could remain at their school, keeping community bonds strong, and minimizing social and educational disruptions was a priority. With the PC Fund in place, Penn Charter's retention rate was one of the highest in recent times: 97.3 percent. In general, Zurcher said, "We did not see people leaving the school because of financial reasons."

Along with all the practical benefits of the Preserving Our Community Fund, it represents a partnership between school leaders and donors—many of whom are alumni—to steward current families.

"It's been a hand to help members of our community over a big bump in the road," Zurcher said. "People who attended PC paid it forward. We hope these families will one day pay it forward. I think for a Quaker school that's the right message." [PC](#)

– Rebecca Luzi

"People who attended PC paid it forward. We hope these families will one day pay it forward. I think for a Quaker school that's the right message."

–JOHN ZURCHER: Director of Financial Aid

ATHLETICS & WELLNESS CENTER

BANDING TOGETHER

There is an enduring tradition at Penn Charter of former classmates banding together to show gratitude for the school that helped shape them. It's a strategy that allows alumni to pay it forward in a more impactful way than they could alone. This year, two OPC classes—1966 and 1971—announced major collaborative gifts to the **How Far?** campaign that will directly support Penn Charter's campus transformation.

While celebrating their 50th and 55th reunion years, respectively, both groups of OPCs decided to honor the occasion with a gift, and both identified a need in Penn Charter's new Graham Athletics & Wellness Center. "They came to us and asked how they could be most helpful to

the school right now," said Senior Development Officer Chris Rahill. And while reunion giving is often directed toward scholarship funds, he said, at this critical stage in the **How Far?** campaign alumni are in a position to leave their mark on Penn Charter in unusually eye-catching ways.

And that's just what they opted to do: The Class of 1966 directed its gift toward two sets of bleachers in the Graham Center's competition courts and the Class of 1971 funded a scoreboard in the same space, both helping to put the finishing touches on Penn Charter's cutting-edge new facility.

Beyond their sleek utility, these fixtures also will embody a deeper significance for the reuniting OPCs, who dedicated their gifts to departed classmates.



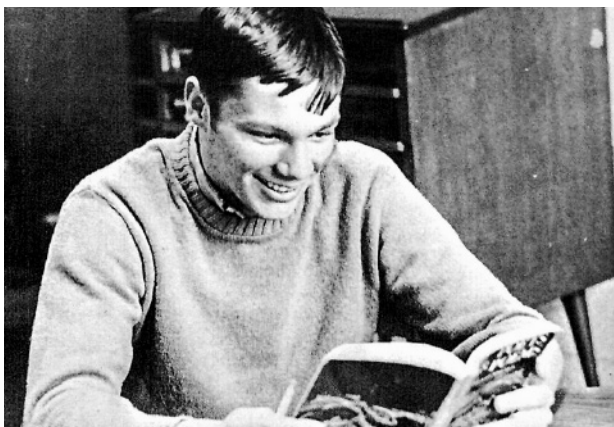
The late Steven Distefano holds the upper left corner of the flag in this photo of the Class of 1966 at their 50th reunion in 2016.

The Class of 1966 decided to commemorate Steven “Stef” Distefano, a talented three-sport athlete who won All Inter-Ac honors in football and excelled in baseball and basketball. He worked as a construction superintendent and estimator for C. Amodei Company in Bensalem, Pa., and remained close with many of his Penn Charter friends throughout his life. Distefano passed away unexpectedly in 2018.

“He was one of our favorite guys,” said class agent Stephen A. Bonnie OPC ’66, who looks back fondly on his class’s 50th reunion in 2016, their last hurrah with Distefano. Bonnie helped galvanize his fellow OPCs around the idea of a gift to mark their 55th: “We decided, ‘Let’s fire this thing up. Let’s do this for Penn Charter, for ’66, and let’s do this for Steffy.’” The bleachers—a pair for each of the Graham Center’s two competition courts—matched up with the Class of 1966’s fundraising prospects and felt like an appropriate tribute to Distefano, who remained a passionate spectator long after he’d given up competitive athletics himself.

Members of the Class of 1971, led by class agent Charlie Kaesshaefer, elected to honor Billy Harris, an elite high school basketball player who died of leukemia in 1986. In a class full of colorful personalities, Kaesshaefer said, Harris stood out for his “singular focus” on the game: “He dedicated his high school and college years to being the best player he could be.”

That dedication paid off in a big way when Harris finished the 1970-71 season as the leading scorer in Pennsylvania, earning an average of 28.7 points per game and once putting



Billy Harris OPC ’71 still holds PC’s record for career points in boys basketball, with 1,646.



During PC/GA Day in November, the Class of 1966 will dedicate the bleachers in the competition courts of the new Graham Athletics & Wellness Center, shown here under construction this summer.

away 65 during a single four-quarter tear. He went on to play and study at Jefferson University (then Philadelphia College of Science and Textiles), where he would later serve as director of alumni affairs and sports information. Fifty years on, Harris still holds PC’s record for career points in boys basketball—1,646—making it all the more fitting that his name will be emblazoned on the team’s new scoreboard.

Members of both alumni classes plan to gather on campus during the upcoming school year, conditions permitting, to unveil their contributions to the space. The Class of 1971 will convene during OPC Weekend in May and the Class of 1966 during PC/GA Day weekend in November, to coincide with Billy Harris’s posthumous induction into the Athletic Honor Society.

Those gatherings would signal a return to the norm for OPCs, who were limited to virtual reunions last spring during the covid-19 pandemic. In both cases, Rahill anticipates a spirited homecoming enhanced by the dedication ceremonies and a general sense of excitement surrounding the Athletics & Wellness Center. “This is a fun opportunity for these alumni to be recognized as a class,” Rahill said, “while helping make the school a better place for current and future students.” **PC**

– Ray Bailey OPC ’09

RIPPLE EFFECTS

TAX-CREDIT PROGRAM FACILITATES IMPACTFUL GIVING

“A decade!” said Praveen Gollapudi, with wonder.

Praveen and his wife, Rinu Jacob, are parents of sixth grader Nyah and ninth grader Jaydon. Both children started in pre-K, making this new school year the Gollapudis’ 11th year as PC parents.

Donors to Penn Charter for equally as long, they are inspired to give because they are invested in the school. “My children go here. We want the school to be successful,” Praveen said. “We support causes that are really worthwhile to us, and this is one of them.”

Last year, Praveen and Rinu explored the possibility of giving to the school by redirecting their tax dollars to PC through Pennsylvania tax-credit programs: the Earned Income Tax Credit (EITC) and Opportunity Scholarship Tax Credit (OSTC) programs. The pair attended a virtual workshop run by Senior Development Officer Chris Rahill OPC ’99 to learn about the tax-credit programs that



Praveen Gollapudi, Nyah (Class of 2028), Jaydon (Class of 2025) and Rinu Jacob.

support financial aid for qualified students at PC. “The tax-credit programs are an essential component of our yearly financial aid budget, and combined with our endowed scholarship funds they allow Penn Charter to attract the best students, regardless of financial need,” he said.

PC parent Jeff Markovitz presented virtually, detailing how the two programs benefit the school and the individual donor, and he explained Special Purpose Entities (SPEs), the newest development in the distribution of the tax-credit funds to schools.

The online session about tax-credit giving via SPEs was the first of its kind at Penn Charter and is something Rahill intends to continue as a way to help spread the word.

“The tax-credit virtual presentations are a great way to learn about EITC and OSTC and just how easy it is to qualify and make an immediate impact on the Penn Charter financial aid program,” Rahill said.

Praveen found the process straightforward and went about it himself, though other donors may prefer to consult their financial advisor.

An Accessible Option

Individuals who wish to give can select from several options, each designed to support schools in underperforming districts. Rinu and Praveen chose to give through the EITC program and,

specifically, the Friends Collaborative, a special-purpose entity SPE.

Friends Collaborative is comprised of Quaker schools in the area that have joined together to expand financial aid at each school in this way, by attracting the deferred tax dollars of parents, graduates and supporters.

See the chart on page 14 for how it can work for PC donors.

“I wish I had known about this earlier,” Praveen said. “For families who can manage to do it, you’re either giving money to the state or to Penn Charter. Giving this way is great for people who want to see their tax dollars at work in front of them. You can see it right at the school.”

Andrew Kramer OPC ’81, P ’14, ’16 agrees.

“To me it’s just a no-brainer. It makes perfect sense,” Kramer said. “Hopefully, you’re giving a gift anyway, and quite frankly it helps that you’re paying state taxes and you’re supporting a place you really believe in.”

Recalling his experience as a student and as a PC parent, Kramer recognizes the importance of supporting financial aid, which these tax-credit giving opportunities do.

“I know from my own experience that a lot of boys and girls who went to Penn Charter were on scholarship and were only able to go because of the support of alumni and parents. And I wanted to continue that tradition — to make



Andrew Kramer OPC ’81 and Head of School Darryl J. Ford Hon. 1689 with Hannah OPC ’14 at her graduation. Andrew’s younger daughter, Leah, graduated from Penn Charter in 2016.

TAX-CREDIT PROGRAMS

the school available to kids who cannot afford it. This giving allows that.”

Kramer has supported the Annual Fund for 35 straight years and gave via one of Penn Charter’s SPEs for the first time in 2020.

“It’s a great benefit to the school, and quite honestly it benefits the individual donor,” he said. He plans to do it again.

A Community of Families

Penn Charter works hard to build community in the school, and Roger and Dana Band P ’29, ’30 have noticed.

“What inspired us to give is the experience our children have had,” Dana said. “The folks who work at PC are so dedicated to what they do, not just for the kids but for the community. We feel a strong sense

of community at Penn Charter and it is our responsibility to make it a stronger place.”

Based on that sense of responsibility and gratitude, the Bands made a gift through the Central Pennsylvania Scholarship Fund (CPSF), an SPE similar to the Friends Collaborative and one of many from which to choose.

Roger said what inspires them to support the school is “seeing the

HOW TO USE PENNSYLVANIA PERSONAL INCOME TAXES TO SUPPORT PC



Visit penncharter.com/taxcredits to learn more about using a Special Purpose Entity or other tax-credit programs to make a gift to Penn Charter.

deeply personal investment that so many have made literally every single year in the emotional and intellectual growth of our children. Giving enables the opportunity for other children to be able to experience the same things. And I think that is good for everybody.”

Like Rinu Jacob and Praveen Gollapudi, Roger and Dana Band joined PC when their eldest entered pre-K. Over the years, they have formed relationships with teachers that extend beyond the year their son is in a particular grade, and they’ve built new friendships with other parents. Roger said their experience as parents “has broadened our circles of adult friendships in a way that I hadn’t expected.”

Supporting financial aid via tax-credit giving, Dana Band said, “just helps us be able to give more.”

Rahill is grateful to those who do.

“The donor impact of this program is immense,” Rahill said. “When redirecting tax dollars, it only costs a dime to give a dollar, and as more people learn about this program there is no telling how many opportunities we can create for our students.”

PC is more than a school for its students—it is a community of families. And, as Andy Kramer understands, it’s a community of families that take care of each other. Together, Penn Charter

families positively impact each others’ lives, leaving ripple effects for years to come. **PC**

– Julia Judson-Rea



Roger, Parker (Class of 2029), Cooper (Class of 2030, front, in cap) and Dana Band in Colorado’s backcountry. The Bands joined the PC community when Parker, now in fifth grade, started pre-K.

To learn more about how to use your Pennsylvania personal or business taxes to make a gift to Penn Charter, contact Chris Rahill OPC ‘99 at crahill@penncharter.com or 215-844-3460 ext. 134.

.....➤
It only costs
.....➤



.....➤
TO GIVE
.....➤



STRENGTH IN NUMBERS

THE COLLECTIVE POWER OF ANNUAL FUND GIFTS

Over the life of the transformative **How Far?** campaign, the Penn Charter Annual Fund has risen to meet and even exceed expectations. In the last year, on a goal of \$1.5 million, the fund raised \$1.72 million.

“The Annual Fund has grown by \$50,000 each year since 2013, achieving one of the foundational goals of the **How Far?** campaign and showing the power of our community when we come together,” said Chief Development Officer Jack Rogers.

The Annual Fund is critical to Penn Charter’s success. Emma Rowan, director of the Annual Fund, explained that the fund ensures that PC can attract and retain the most qualified faculty; can institute new educational technologies; and enroll the most talented students and

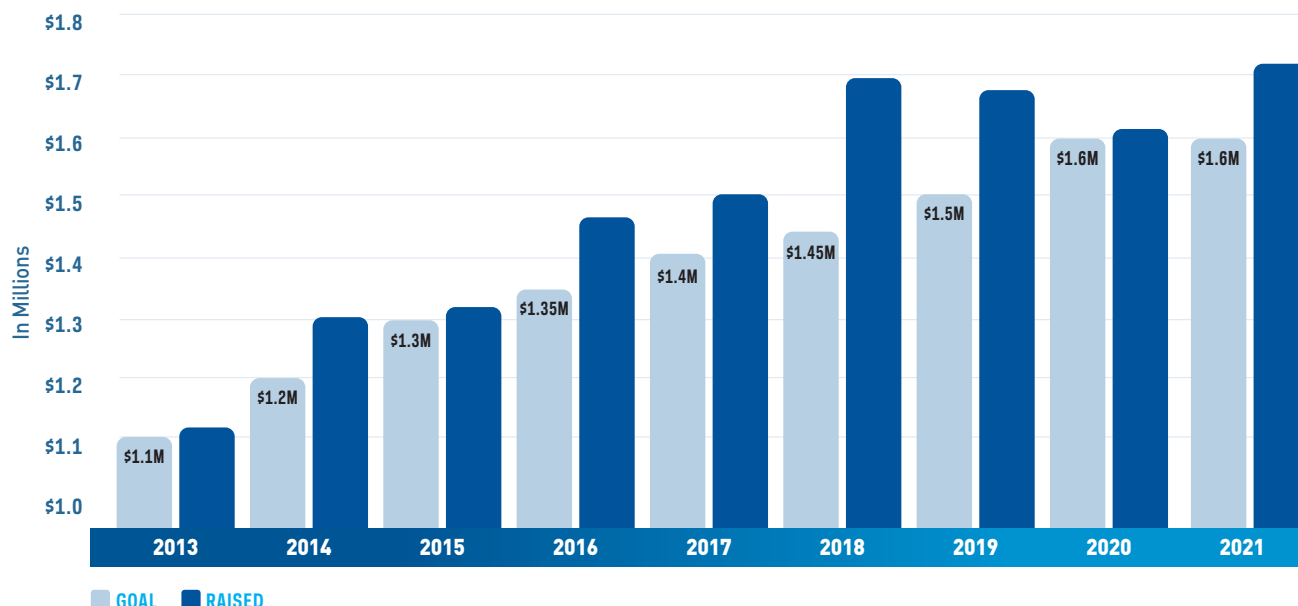
develop their skills and values for a rapidly changing world. “The Annual Fund helps ensure rock-solid operations that make possible excellence across academics, arts and athletics today, and into the future,” she said.

Hundreds of donors representing every constituency in the PC community—parents, OPCs and OPC parents, faculty and staff, grandparents, former employees, and friends of the school—support the fund.

“The Annual Fund is by our community, for our community,” said Rogers. “What’s more Penn Charter than that?”

The collective power of Annual Fund gifts powers PC. These individual stories reveal the spirit of community, and gratitude, at the heart of each gift.

IT ALL ADDS UP: GIFTS OF ALL SIZES



LEADERSHIP GIVING: IT ALL ADDS UP

IT ALL ADDS UP: LEADERSHIP GIVING

82 new donors at a leadership level in 2020-21.

To learn more about Leadership Giving and the William Penn Society see the inside back cover.

Looking back at his eight-year-long experience as a Penn Charter parent, Greg Veith P '21 adds up all the things over the years that confirm for him that PC was the right place for his daughter, Julia.

Veith speaks foremost and admiringly about his daughter's group of friends. And he recounts how Middle School teachers supported and nurtured Julia and her friends during the rough waters that can come in those years. He speaks warmly of teachers Charlie Brown, Jim Fiorile and Joe Fitzmartin. He relives watching Julia onstage for assorted plays, musicals and concerts.

Veith is enormously proud of Julia, who was recruited to row for Stanford University, and his gratitude to Penn Charter runs deep.

"You're talking to someone who hit the lottery," Veith said. "She wouldn't have gone to Stanford if she didn't go to PC. But PC was the perfect fit long before the college result," he said.

Each year, parents of the graduating class come together to make the Senior Parent Gift, a component of Penn Charter's Annual Fund. Contributions from many families, ranging in size and each important to the end result, support professional development for the faculty and staff as a way of saying thank you—and also strengthening PC for future generations. This year, 74 percent of the Class of 2021 parents participated in making gifts, surpassing their goal and raising more than \$107,000.

"PC was very generous to us, and for Julia, it was the perfect school. How do you repay that?"

"As best you can," said Veith, answering his own question.



Patricia and Greg Veith are enormously proud of Julia OPC '21. Recruited to row for Stanford University, Julia won gold with her coxswained quad at the 2021 Junior World Rowing Championship this summer in Bulgaria.

Unorthodox Giving Timeline

Veith took an unusual path this year to join the ranks of PC's leadership donors.

"I'd be watching TV at night and come across something and think of Penn Charter, so I'd send \$100." Later, "I'd get the magazine and the yellow envelope was in there, so I'd send a little more."

And soon two gifts, three, four—they started adding up. "I had no plan, there was no thinking it out," Veith said of this approach. But at some point Assistant Director of Development Nicole Martz informed Veith that he and his wife, Patricia, were getting close to \$1,689, the entry point into the William Penn Society.

"So I decided to go for that." And just like that, with small gifts adding up over time, the Veiths had made a leadership gift. (More about the William Penn Society on the inside back cover.)

"I probably should be on a monthly plan," joked Veith. "It might have been 10 times or more last year, generally on a whim, but it always came from the same place of feeling unbelievably appreciative and terribly fortunate."

STEPPING UP WITH REUNION GIVING

IT ALL ADDS UP: INCREASED GIFTS

883 donors increased their gift to the Annual Fund or gave for the first time.

In gratitude and because he believes in what the school can do for its students, and what it will do for his daughter, Mickey Sala OPC '96, P '28 has supported the Annual Fund consistently since he graduated.

"I was a lifer. Penn Charter is the only school I really knew," Sala said. "It gave me a lot of consistency and gave me the confidence as I grew up that I think, overall, helped me become who I am today."

Sala built his confidence in the classroom, and on the playing fields. Project by project, and game by game, it really added up.

"What I fully appreciated about PC was that if you wanted to try something, you could," explained Sala. "The environment created that movement for me academically and athletically. I had never played lacrosse, but I picked up a stick in sixth grade and ended up playing in college." Sala enrolled in Bucknell University without the status of an athletic recruit,

but had the ability and confidence to walk on to the Bucknell lacrosse team.

Sala is part of the equation of growth of the Annual Fund.

This past year, Sala and his wife, Jen, were inspired to give a larger gift than prior years because of Mickey's experience, because it was his reunion year, and because their daughter, Annabel, begins her PC career this year as a new sixth grader. It all added up. "We feel fortunate of the position we are in and wanted to give back to the institutions that helped us get there," he said. "We felt it was time for us to step up and do our part to ensure other people have the opportunity to experience PC."

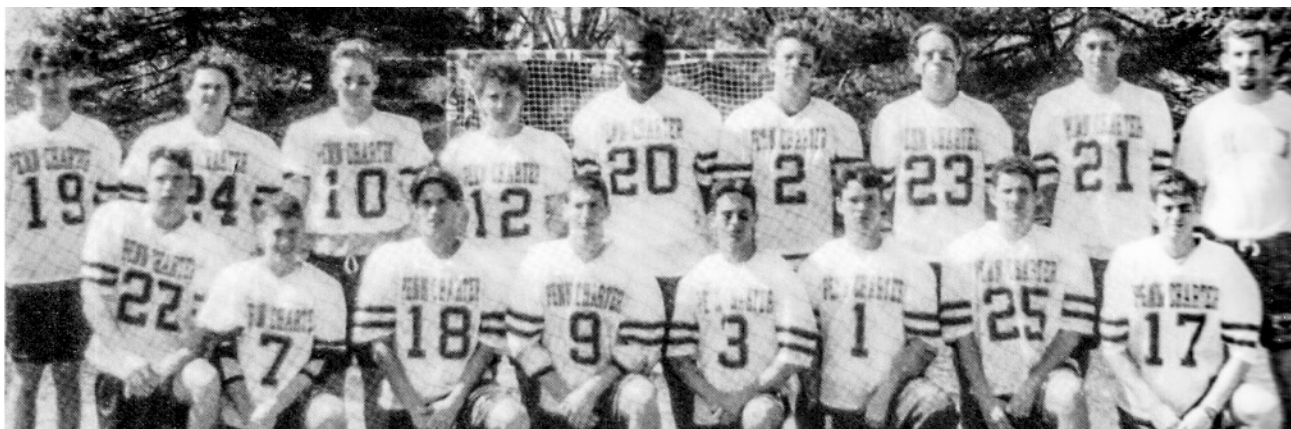
ALL KINDS OF GIFTS

719 GIFTS UNDER \$100 (a critically important 44% of donors!)

883 DONORS who gave for the first time or increased the amount they gave this year

62 DONORS who amplified their giving with corporate matching gifts.

"We need all of these gifts, but most importantly we need you," said Emma Rowan, whose job it is to ensure a robust Annual Fund so the school can operate at the highest level.



Mickey Sala OPC '96 is managing director of strategic origination and business development at LLR Partners, a Philadelphia private equity firm. Sala wears #21 in this photograph of the 1996 lacrosse team.

EMPLOYER MATCHING GIFTS: MAGNIFY YOUR GIFT

IT ALL ADDS UP: MATCHING GIFTS

PC raised \$153,646 in corporate matching gifts

Matching gifts can support any fund at PC and all will have an impact.

For Drew and Tanya Aldinger P '26, '28, one plus one equals two, and more. When their elder children started at Penn Charter, the Aldingers were happy to see each child quickly and warmly enveloped into school life.

"Hannah started in sixth grade, and she was welcomed into the community in a really great way," said Drew. "What was more impressive was when [my son] Drew started amid covid, he still felt part of the community almost immediately."

Hannah and Drew are now in eighth and sixth grade, respectively, and their parents trace their son's welcoming experience to efforts made by both his teachers and by his peers.

Adding it all together, the family is inspired to support the Penn Charter Annual Fund for all the reasons they chose PC, plus all the reasons why they continue to love it. The balance of academics, service, arts and athletics attracted the Aldingers to PC, and "it was very important for us to continue in a Quaker education," Tanya said. "Our children are challenged to go beyond their comfort zone in and out of the classroom."



Drew and Tanya Aldinger with their children, Hannah [Class of 2026], Drew Jr. [Class of 2028] and youngest, Steven.

Drew and Tanya Aldinger amplified their gift using a matching program at Tanya's employer, GlaxoSmithKline (GSK). Programs can vary from one company to another, but GSK's matching program is a dollar-for-dollar match of an employee's charitable contribution, one of the most common ratios. And, while the Aldingers chose to direct their gift to the Annual Fund, matching gifts can double (and sometimes even triple) the impact on any fund a donor chooses.

"We do have a certain amount of enthusiasm that the gift can be more impactful when matched—it is magnified," said Drew.

Likewise, Kerry and Patrick Cahill P '27 increased the impact of their philanthropy by having their Annual Fund gift matched by Kerry's employer, Sammons Retirement Solutions. "It was important to us to maximize and compound our interest and gift-giving capabilities with Penn Charter," Kerry said.



Patrick, Alexa (Class of 2027) and Kerry Cahill.

Their motivation for embracing new ways to give to Penn Charter is similar to the Aldingers'. "We want to give more to the PC community as it has already created significant contributions to our family, and more importantly to the genuine growth of our daughter Alexa."

"We are blessed and fortunate to be present within the Penn Charter community," Kerry said. "And, if our financial contribution and stewardship can help others experience similar opportunities and create memories for their family, we are happy to do so today and in the future."

– Julia Judson-Rea

Discover if your company matches donations by searching matchinggifts.com/penncharter. Or, contact Blanca Womack via bwomack@penncharter.com, or 215.844.3460 ext. 131, for questions about corporate matching gifts and how you can direct your gift.

IMPACT IN YOUR LIFETIME

Penn Charter's Pinehurst Society recognizes alumni, parents and friends who have provided for the school through planned gifts or bequests, and James M. Arrison III OPC '60 is a member because he named PC in his will. He felt compelled to do so.

"Penn Charter was my life. It basically is who I am," Arrison said recently. He was born in Germantown, grew up in the Kenilworth Apartments on School House Lane, and was a PC "lifer," attending from kindergarten to grade 12.

Arrison's connection to the school has continued through 50-plus years as class agent for the Class of 1960 and friendship with John T. Rogers Hon. 1689, Penn Charter's chief development officer.

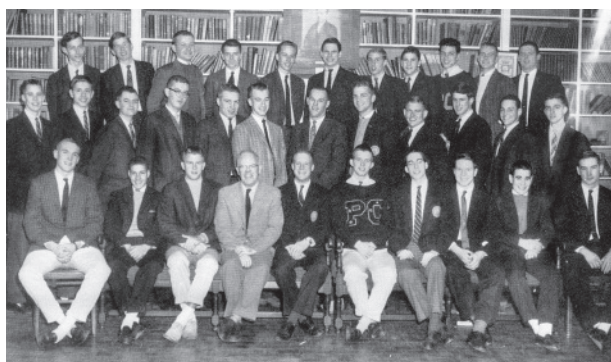
In a conversation with Rogers, Arrison saw a way that he could support and impact Penn Charter now, rather than after his death. "I recognize, as I grow older, that I may well have more financial resources than time to spend them," said Arrison, now age 79. "It makes more sense to me to make a gift during my lifetime, and to see its impact."

Arrison made a \$100,000, tax-savvy gift annuity that provides multiple benefits:

- Arrison reallocates profit he has made in the market to a charitable institution, PC, reducing his capital gains taxes. He can use the provisions of the CARES Act, extended through 2021, to reduce his adjusted gross income this year.
- And, he increases his cash flow. Penn Charter will invest the money and pay him about 7 percent interest on the \$100,000 for his lifetime. Upon his death, PC will receive the \$100,000.

The interest rate is favorable because of Arrison's age, and he intends to donate to the Annual Fund each year all the income from the charitable gift annuity. He has made gifts to the fund for more than 40 years.

Arrison said his support of the school reflects the influence of his Quaker education and is consistent with the nonprofit work that has given meaning to his retirement. Arrison



Jim Arrison, front row left in this yearbook photograph of the 1960 PC Literary Society, looks forward to seeing classmates in October at their 60th OPC reunion, postponed from 2020 because of covid.

enrolled in the United States Naval Academy after Penn Charter, then joined the Navy. He served 27 years, retired as a captain, and followed that with a 20-year career as an investment advisor with Merrill Lynch in Washington, D.C. In retirement, Arrison joined the board of Let's Go Boys and Girls, a nonprofit that provides in-school and after-school STEM instruction to students in the Baltimore, Washington, D.C. and Annapolis areas.

"In many ways it reminds me of Penn Charter," Arrison said of Let's Go Boys and Girls. "We provide quality teachers with the tools they need to excite their young students. They're the kind of teachers who totally care about their otherwise underserved students. My Penn Charter teachers cared about me on the athletics field and in the classroom. They were so generous, and so forgiving of all my missteps, and I had plenty of them. I am who I am because my Penn Charter teachers cared about me. Now, with Jack Rogers' help, I hope that my gift will help ensure that the Penn Charter faculty continues to serve their students first." **PC**

For information about planned giving, and gift annuities specifically, contact Shannon Makhija, Director of Advancement Services, smakhija@penncharter.com or 215-844-3460 ext. 128.

WILLIAM PENN SOCIETY

The William Penn Society, named in honor of Penn Charter's founder and honoring key leaders and milestones in the school's history, recognizes leadership gifts to the Annual Fund.

Penn Charter invites donors at the \$5,000 level and above to the annual Leadership Donor Dinner. All members of the William Penn Society are welcomed at the Color Day luncheon.



RICHARD MOTT JONES BENEFACTORS \$50,000+

Richard Mott Jones, head of school from 1874 to 1917, helped reorganize the school from a network of small schools into a college preparatory school for boys and initiated the move from Center City to the campus on School House Lane.



JOHN FLAGG GUMMERE PATRONS \$25,000-\$49,999

John Flagg Gummere, known respectfully and affectionately as "the chief," was a scholar, renowned educator and head of school from 1941 to 1968.



HANNAH CALLOWHILL PENN COUNCIL \$15,000-\$24,999

Hannah Callowhill Penn, William Penn's second wife, is credited with keeping the colony of Pennsylvania running during her husband's ill health.



CHARLES THOMSON CIRCLE \$10,000-\$14,999

Charles Thomson, head of school and Latin teacher from 1755 to 1760, was secretary of the Continental Congress during the American Revolution.



ANTHONY BENEZET GUILD \$5,000-\$9,999

Anthony Benezet, one of America's first abolitionists, started the first school for African American students and left that school to the Overseers in his will, with a small stipend to keep it going.



WELCOME ASSOCIATES \$3,000-\$4,999

William Penn's two-month journey to America began in Deal, England, on the 150-foot ship Welcome. The Welcome landed first in what is now New Castle, Del., finally stopping in Chester, Pa., on Oct. 28 or 29, 1682.



1689 FOUNDERS \$1,689-\$2,999

William Penn Charter School is the oldest Quaker school in the world, founded in 1689 by William Penn.



THE CLOCK TOWER SOCIETY

A leadership giving society for young OPCs within 10 years of graduation.

OPCs 0-5 years from graduation lead with a gift of \$16.89 or more, annually.

OPCs 6-10 years from graduation lead with a gift of \$168.90 or more, annually.

Our Donor Lists



THIS YEAR, to save money and trees, we published the details of the 2020-21 Report of Gifts online at penncharter.com/gifts.

The material is protected with a password to ensure the privacy of our donors.

To access details about charitable giving at PC enter the password: **stewards**.

campaign.penncharter.com

"Honoring a PC Sports Legend"



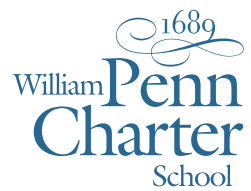
Shipon Training Suite



Trude and Franz Kaufmann



Catch up on the latest people stories and successes of the **How Far?** campaign at campaign.penncharter.com.



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