



Pendleton Foundation Trust
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From left, back row: Kevin Hale, Lonnie Read, David Blanc, J.J. Spriet
From left, seated: Marie Hall, Pat Terjeson, Donna Biggerstaff

The purpose of the Pendleton Foundation Trust is:

- To assist civic and educational undertakings whether now supported by private gifts or public taxation.
- To improve educational and scientific research.
- To improve living conditions or to provide recreation or recreational grounds for all classes.
- For such other civic or public purposes as will best make for the mental, moral and physical improvement of the inhabitants of the city of Pendleton.

*The Foundation thanks those who have made a contribution to Pendleton Foundation Trust.
This support makes it possible to provide more grants that improve life in our Pendleton community.*

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1928 - 2020

Pendleton Foundation Trust

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BMCC Students Receive Dudek Diesel Scholarships

Nestor Guzman, Anthony Rodelo, Tanner Sater and Hannah Wilson-Wolfe, Blue Mountain Community College students enrolled in Diesel Technology, received \$3,000 grants from the Pendleton Foundation Trust early in December, to purchase tools required to continue in the AAS Program.

The awards were made at the end of fall term to provide funds to purchase the basic set of diesel tools

required for winter term courses. With few exceptions, industry employers require mechanics to provide his/her own tools in the workplace. The average diesel mechanic will accumulate a \$25,000 tool inventory in the first ten years working in the trade.

In applications for the funds, students expressed their plans to gain employment in the region and to give back locally. Potential employers listed included RDO,

Farm Equipment Headquarters, Kenworth Sales, Woodpecker and local farmers.

Clelan "Lee" Dudek's estate gift to the Pendleton Foundation Trust made the scholarships possible. Lee and his wife, Luella, owned and operated Lee's Refrigeration Company over 50 years. With his gift to the Trust, he acted on his belief in the need for young people to gain an education - which might include a skill or trade.

Winter 2020

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Wyland, Groupe Scholarships Awarded

The Alan Wyland Memorial Scholarship established in April of 1998 is given in memory of Alan Wyland, a youth pastor and vocalist. It is awarded to a Pendleton High School senior who is involved in music or the performing arts, with an emphasis in music.

In the spring of 2019, **Tyler Simpson** was recognized as the recipient of the Alan Wyland Memorial Scholarship and received a scholarship of \$1,000.

Tyler is a talented musician and plays the violin. In high school he was concert master of the orchestra and performed with the acappella choir. He represented Pendleton High School in the large string orchestra at the Oregon Music Educators All-State selected ensembles. His extracurricular activities included performing with the East Oregon Symphony and acting as a mentor for young violinists in the fifth and sixth grade. Tyler graduated from Pendleton High School with top honors.

He is attending Central Washington University to pursue a degree in music performance. Central Washington has the top music performance program in the Northwest. Tyler was among 36 applicants for the music performance program for violin and was required to audition as part of the admission process. He was one of only six applicants accepted. As a student at Central Washington Tyler is performing with the orchestra. He is the son of Terry Simpson, Jr. and Cindie Simpson.

Last spring, Pendleton High School student **Tatum Paullus** was recipient of the \$1,000 Ole Groupe FFA Scholarship and attended the Future Farmers of America National Leadership Conference in Washington, D.C. She represented her PHS FFA chapter. This event is held annually for FFA students and runs for seven weeks and is attended by several hundred students from across the country each week who learn how to become more effective leaders.

The Ole Groupe FFA Scholarship helps fund this trip. The Pendleton Foundation Trust has worked with the Groupe family for twenty-three years to help give PHS students. the opportunity to gather with other FFA members from around the country and share their thoughts and experiences.



Tyler Simpson



Bikes, Containers Enhance Lost & Found Program

In the spring of 2019 the Pendleton Foundation Trust awarded the Lost and Found Youth Outreach money for a grant to purchase bicycles, a shipping container and other necessary materials. They have not only learned how to ride on the trails which were made by other Pendleton biking enthusiasts, they are learning how to build them. The trails are located on the hill by the airport.

The 5 mountain bikes and containers to store them have really increased the ability of Lost & Found to serve youth and encourage them to be active outside. Leslie Carnes said, "It is really exciting to watch the kids face fears and challenges, overcome obstacles that they thought they couldn't succeed at, and actually accomplish tough tasks while encouraging their friends is exceptionally gratifying to everyone lucky enough to be involved."

When this project began some youth had never ridden a bike and the youth that had were riding solely on the easiest beginning course and doing it once.

Now they're going on the advanced difficult trails and riding them two or more times in an afternoon. A hidden benefit is that learning how to ride a bike helps you learn to maintain balance. And that skill actually improves the youths' ability to visually focus which enhances reading abilities.

Lost & Found believes the PATRA activities have helped build cohesiveness among different groups of youth, bringing Native youth together with "in town" youth to the benefit of both. Pendleton On Wheels (POW) and Pendleton Parks & Recreation have actually given the youth opportunities to help build and maintain trails and equipment which gives them a sense of ownership while building life skills and developing a healthy work ethic. Lost & Found is grateful to Stewart Wuest, their key volunteer on this project, and to Pendleton Foundation Trust for investing in youth through Lost & Found Youth Outreach!

How can I contribute to the Pendleton community?

- Dr. John McBee (1929-2019) advised wisely, asking:
- **Where will you get the greatest satisfaction in giving?**
 - **Is the entity known for spending most of its income responsibly?**
 - **Will the organization honor your wishes as to how to spend your contribution?**

In 2016, Dr. McBee wrote, "I can assure you that the Pendleton Foundation Trust treats each contribution with the utmost care and puts it to use to make this community a better place for its

residents. The PFT Board members thoroughly review and research each request. If funds are granted, they may be used only for the specific purpose that was approved. If funds remain after the project is completed, the money is returned to the Foundation. You can be assured that your money is valued and carefully spent. Throughout this community, you will see the evidence of grants the Foundation has made to make Pendleton a better place."

Dr. McBee lived in Pendleton over 80 years, serving on the PFT Board of Directors for 43 years.

Houk Retires from PFT Board

After seven years of service, Kathy Houk has made the decision to retire from the Pendleton Foundation Trust Board this past April. We caught up with Kathy and talked to her about her time as one of the people that helped fulfill the mission of the Pendleton Foundation Trust.



Kathy Houk

In talking about her experiences, Kathy said it was truly her honor to serve the community in this way. "Getting to know and work with the other board members was a highlight," she says. "The people who have served on this board are solid Pendleton supporters and take the Foundation's purpose to heart. I wish each person in Pendleton could have a chance to know all the good work the Trust has done for the community, as I got to experience by serving. Every group, facility, organization, school, and citizen in the city have been enriched by the Foundation."

Kathy also enjoyed the grant process the Foundation Trust goes through to make sure that funds are issued responsibly to deserving groups in Pendleton. She describes speaking with the people that submitted grants that she worked on as a highlight. "They all were so excited to explain their projects," she explains. "They were not asking to benefit themselves, but to improve something in which they believed. Their exuberance was infectious and I couldn't wait to support their plan to the other board members and have the project approved. Watching as their plans evolved and seeing the finished product was very fulfilling."

Additionally, Kathy spent many years on the Foundation's Scholarship Committee, which she considered one of the many highlights of her years of service. "The Foundation presents several scholarships to graduating seniors," she says. "It was an encouraging and delightful duty to speak to the gifted students from Pendleton High School who qualified for the scholarships. The talent, hard work, community service, and scholastic achievement of these students was impressive and made all of us on the committee very aware that the future of Pendleton was in capable hands."

Characterizing her decision to retire, Kathy relates that it was a tough decision. She and her husband Phil (the former Mayor of Pendleton) are now both retired and she wasn't sure she would be able to contribute to the Board as much as she would like while also attempting to fully experience the joy of being completely retired. The two of them plan on keeping up with their grandchildren and family and doing some additional traveling.

Kathy's contribution to the Pendleton Foundation Trust and to the community has been a generous commitment of time and effort on her part. We will miss her perspective, solid decision making, her presence at meetings, as well as the homemade snacks that she used to always bring! We would like to thank Kathy for her service to the Pendleton Foundation Trust Board of Directors, and would like to wish her all the best in her retirement!

WHERE ARE THEY NOW? 2010 PFT Scholarship Recipient Brian Barry



Brian Barry

The Pendleton Foundation Trust is privileged to highlight a past recipient of a Pendleton Foundation scholarship. This quarter we check back in with Brian Barry. After graduating from PHS in 2010, Brian attended Santa Clara University where he graduated cum laude in 2014 with a degree in Finance. While a student at Santa Clara, Brian also worked on the Finance team for the San Jose Earthquakes of Major League Soccer. Post college, he moved to San Francisco where he spent five years at Bank of America, Merrill Lynch and Mizuho Securities on their Corporate & Investment Banking teams, advising large public and private technology companies. Always hoping to return to Oregon, last year Brian moved to Portland where he is currently with HSBC Bank providing corporate banking and advisory services to multi-national companies headquartered throughout the Pacific Northwest.

In his free time, Brian enjoys traveling, exploring all the PNW has to offer, and Portland Trail Blazers basketball.

Brian would like to thank the Pendleton Foundation Trust again for selecting him as one of the past scholarship recipients. "The scholarship was very impactful in helping me achieve my academic goals," he said. The Pendleton Foundation is honored to help and assist the students of Pendleton as they venture out to forge their own path forward.

GRANT APPLICATION DEADLINE - APRIL 1, 2020 is the deadline to apply for grants from the Pendleton Foundation Trust.

Applications may be found online at www.pendletonfoundationtrust.com

Using Donor-Advised Funds to Enhance Your Charitable Giving

Last year, many of us found ourselves choosing the new larger standard deduction on our federal income tax return rather than specifically itemizing a deduction for charitable contributions. The purpose of allowing us to deduct our charitable contributions is to encourage philanthropy, yet with the change in tax law many of us did not receive any tax savings from giving. Creating a Donor-Advised Fund would allow us to optimize our income tax deductions as well as providing the additional potential benefit of lowering Oregon estate tax.

Most of us contribute to our favorite charities year-to-year knowing we are helping them fulfill their purpose but few of us do so as part of a long-term plan. The benefits of a Donor-Advised Fund as part of a longer-term estate plan would be advantageous for many of us. If your financial plans include making regular donations for years to come and/or you intend to leave a bequest to your favorite charities in your will, a Donor-Advised Fund is something to consider.

A Donor-Advised Fund is a brokerage or bank account created by you with a sponsoring organization, typically with an investment firm, who will serve as an intermediary between you and the charities you wish to fund with your donations. Your contributions to this account qualify for an immediate charitable deduction on your income tax return even though your charity of choice does not immediately receive the contribution. After you have funded your account, you have the flexibility to advise the sponsoring organization when and to whom distributions from your account should be made. Because the contribution to your Donor-Advised Fund is immediately tax deductible, a substantial contribution in a given tax year could easily exceed the standard deduction and you would receive greater income tax benefits. One possible strategy, then, would be to "accelerate" or contribute multiple years' worth of donations to your Donor-Advised Fund all at once and itemize that large contribution in one year, and then gradually disburse the proceeds in

your account to charities over the next several years during which you would receive the higher standard deduction without "wasting" an annual charitable contribution. Also, since any contributions reduce the assets in your estate, a donation to your Donor-Advised Fund would also potentially reduce your Oregon estate tax. By leaving a bequest to charity rather than utilizing the flexibility of a Donor-Advised Fund, you are potentially forgoing a current income tax deduction.

You need to be aware that not all Donor-Advised Funds are created equal. The sponsoring organization has its own rules and fees. Also, be aware that Donor-Advised Funds are irrevocable, meaning that you cannot take back any contributions you have made to your DAF account. Be sure you understand the implications of a Donor-Advised Fund before you establish the account.

Talk with your investment and tax advisors about the best way to enhance your charitable giving while maximizing your tax benefits. Better planning creates better results.

PENDLETON FOUNDATION TRUST 2019 FALL GRANTS

The PFT Board has awarded fall grants in the amount of **\$46,073.18** to the following recipients:

- **Sunridge Middle School**, the sum of \$10,890.00.00 for additional weights, benches and support equipment more tailored to fit the needs of middle school students for the Training and Conditioning classes.
- **Pendleton Early Learning Center** the sum of \$9,404.90 to purchase 30 iPads and 30 kid-friendly cases for the computer lab.
- **The Rivoli Theater Coalition** the sum of \$2,500.00 toward the Phase One construction costs of steel and concrete.
- **Eastern Oregon Alcoholism Foundation** the sum of \$8,669.53 to renovate the kitchen, bathroom and laundry room at La Casa Vida, the men's transitional sober home in Pendleton.
- **Pioneer Relief Nursery** the sum of \$11,861.79 to create a more extensive outdoor area with playground equipment for small children.
- **Oregon East Symphony** the sum of \$2,746.96 to purchase fractional-size instruments for instrument-lending library to accommodate the OES "Symphony Strings" program.