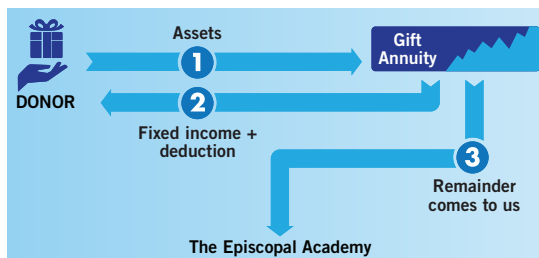


# THE Bishop William White REPORT



## The Episcopal Academy



## Charitable Gift Annuities— A Giving Option

Recently, we have had some inquiries about how a Charitable Gift Annuity works. The Charitable Gift Annuity is among the oldest, simplest, and most popular of the charitable life-income plans. Basically, in exchange for a transfer of cash or marketable securities, Episcopal contractually guarantees to make specified annuity payments to you and/or another beneficiary, for a defined period or life.

The payout rate depends on the number of beneficiaries and their ages, but it might exceed the interest you are receiving on other investments. Please refer to the chart below which shows sample rates of return recommended by the American Council on Gift Annuities, which apply to both men and women. A calculation can be completed based on the birthdates of the beneficiary(ies) and terms specified by the donor. Rates vary with age, the older the annuitant, the higher the maximum annuity rate. The ACGA reviews the rates periodically with the goal that on average, about 50% of the gift amount will remain when the gift terminates.

### GIFT ANNUITY PAYOUT RATES

ONE LIFE				TWO LIVES			
Age	Rate	Age	Rate	Ages	Rate	Ages	Rate
50	3.7%	70	5.1%	50, 50	3.3%	70, 70	4.6%
55	4.0%	75	5.8%	55, 55	3.5%	75, 75	5.0%
60	4.4%	80	6.8%	60, 60	3.9%	80, 80	5.7%
65	4.7%	85	7.8%	65, 65	4.2%	85, 85	6.7%

Another benefit is you can claim a current charitable deduction for the portion of the gift that represents the charitable gift element—the amount by which the value of the property transferred to the school exceeds the value of the annuity received. As with other types of annuities, a portion of each annuity payment is income tax-free over the life expectancy of the annuitant.

If you want to know more about gift annuities or other deferred gift options, please contact Patsy Porter, Director of Planned Giving, at 484.424.1780 or [pporter@episcopalacademy.org](mailto:pporter@episcopalacademy.org). Or visit our Planned Giving site @ [www.ea.gift-planning.org](http://www.ea.gift-planning.org).

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## Dear Members of the Bishop William White Society,

Since our last BWW Report in March of 2014, we have added twenty-three individuals to our roster! Members of the EA community are embracing the opportunity to include The Episcopal Academy in their estate plans—some as a result of realizing how easy it is to do so, some because they can leave a larger gift to the school in this way, and others are just getting around to letting us know. I have made an effort to meet as many of you as possible and, hopefully, enlist you to spread the word about making planned gifts to the school. Our members now wear Bishop William White Society buttons at events so others will ask about the designation. And we have honored our members on the wall of Sherrerd Alumni House to celebrate their participation. We want to be sure all members of our community know about our legacy society and the people who make it possible.



EA continues to be on the leading edge of innovative education with another successful year of JTerm and the addition of the Global Online Academy. JTerm offers Upper School students an opportunity to explore a wide variety of subjects in depth for two weeks each January. Faculty and students have embraced this experience. This year, our students built kayaks, designed sacred spaces, explored scientific concepts, and produced one-act plays. A special edition of *Connections* specific to JTerm will be issued in the spring, so please keep your eye on your mailboxes.

The Global Online Academy offers students and faculty the ability to participate in courses with a group of 50 schools from around the world on a completely different level. These classes enhance EA's curriculum and help our students develop more global awareness. While it is an exciting time to be a student, rest assured that they continue to get the classic basics of an EA education.

I look forward to working with you and am here to answer any of your questions or concerns. Please feel free to contact me at any time. Thank you for including The Episcopal Academy in your estate plans.

Warmly,

Patsy Porter, *Director of Planned Giving*  
484-424-1780 | pporter@episcopalacademy.org

## THE EPISCOPAL ACADEMY GRATEFULLY ACKNOWLEDGES RECENT GIFTS FROM THE ESTATE OF

*Karl F. Rugart, Jr. '41*

## THE BISHOP WILLIAM WHITE SOCIETY WELCOMES NEW MEMBERS

*Mr. and Mrs. Archer B. Battista '64*

*Mr. Ernest B. Brown '38*

*Mr. James T. Carson '43, deceased*

*Mr. Joseph E. Colen, Jr. '57*

*Mr. and Mrs. Walter W. Buckley, Jr. '55*

*Mr. Joseph G. Duncan, IV '64*

*Mr. Thomas A. Foster '64*

*Mr. and Mrs. William Y. Giles,  
Parents of Alumni/Grandparents*

*Mr. Lenard M. Haley, Hon. and  
Mrs. Edna Haley, Hon.*

*Mr. and Mrs. James J. Koegel,  
Parents of Alumni*

*Dr. Thomas J. Locke,  
The Greville Haslam Head of School*

*Ms. Stacey W. McConnell,  
Parent of Alumni*

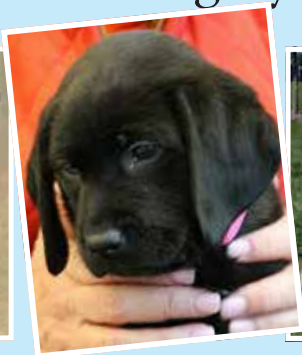
*Mrs. Patricia W. Porter, Parent of Alumni*

*Mr. and Mrs. Bruce Stone '76*

*Ms. Elizabeth Randolph Taglioli '02*

*Mr. and Mrs. Geoffrey F. Worden '57*

# 100% Graduation Rate for Both EA Students and Seeing Eye Dogs



At most schools, dogs are not permitted on campus. At The Episcopal Academy, four-footed furry students routinely attend Chapel, visit the library, navigate crowded hallways, mingle with students, and sneak in a nap or two during the school day. Since 2008, EA has trained eight puppies through The Seeing Eye, a program that trains and provides guide dogs to the visually impaired.

Last year, Sierra, a golden retriever, could be found hanging around with Director of Community Outreach and Service Learning Susan Swanson. Einstein, a black lab-golden retriever mix, held court in the Middle School under the supervision of Learning Specialist Fran McLaughlin.

McLaughlin says, “Einstein had a calming effect on everyone: students, teachers, and staff. He was a great equalizer. And I love how he lived our Chapel theme ‘Love Never Fails.’ He was all about love.” Einstein was known to sprawl out in Chapel and let out an occasional yawn or whine. Students cracked a smile but seemed unfazed. She notes, “Luckily, our chaplains are all dog lovers and Einstein was very warmly welcomed into Chapel.”

When Susan Swanson brought the first puppy to campus, Upper School Form Dean Cheryl McLaughlan was not a fan, observing, “This is a school, not a kennel. But boy was I wrong. After just a few weeks I was able to see the impact the puppy had on our school and our kids. It was amazing.” Cheryl was so impressed that she became a puppy raiser for Zelda ’11, Neeta ’12, and Minda ’13. And Upper School English Department Chair Sarah Baker says, “Year after year, I watch students struggling with stress, schedules, and all the demands of the school day finding respite and release in the company of one of our dogs. It’s part of the fabric of the EA experience.”

The students agree. Hannah Harrity ’15 commented, “I absolutely love having Seeing Eye dogs on campus. It allows students to take a break from the day and relax. It brings our community closer together because everyone comes to see the dog. It makes our school unique.” And Piper Harman ’17 also enjoys having the dogs on campus, saying “I think they make the campus friendlier and a happier place to be.”

Like the student population, dogs with an EA education have a 100 percent graduation rate to date. Nationwide, the success rate for TSE puppies is 60 percent. Sadly, Sierra and Einstein went on to their Seeing Eye training at the beginning of the calendar year. But we have already welcomed a new black lab puppy, Kyla ’16, to our community. And the biggest news is that Kyla is a “*legacy*” puppy, being the baby of Maude ’13. In fact, three of our graduates have been selected for breeding and our next puppy (coming soon) will be a legacy of Minda ’13!

For Fran McLaughlin, saying goodbye to Einstein was tough. “I try and look at it in this sense; my children went to college, then got jobs. Einstein went off to college and then will get a very important job he will love. Our theme has been reinforced for me and, I hope, for the students: Love Never Fails.”

The puppies’ departure is a bittersweet time of year for Susan Swanson as well. “The reality is that our community benefits in ways we couldn’t have imagined. As in most service projects, we get back ten-fold what we give.” Seeing the puppies on campus always brings a smile to our faces.

# Excellence Today and Inspiration

## *Reilly Dugery '15 Named An Intel Science Talent Search Semifinalist*

Senior Reilly Dugery has earned the prestigious distinction of being named a 2015 Intel Student Talent Search semifinalist for her research on formiminoglutamase from *Trypanosoma cruzi*, which causes Chagas disease in humans. She is one of only six Intel semifinalists in Pennsylvania.

Her research, titled “Characterization of the Enzymatic Properties of *Trypanosoma cruzi* formiminoglutamases,” was submitted to Intel as a 25-page peer review journal article. The honor of Intel semifinalist is bestowed upon only 300 applicants in a pool of over 1,800.

For the past several summers, Reilly worked in a laboratory at the University of Pennsylvania, and focused on better understanding the catalytic mechanism and inhibition of *T. cruzi* formiminoglutamase. She began her interest in enzymology during her participation in the Pennsylvania Juniors Academy of Science (PJAS), where she first began designing and implementing complex science projects begun at EA to compete in the PJAS competitions.

“Reilly has truly grown into a budding young scientist,” says Upper School science teacher Kelley Bethoney, Ph.D. “I have seen her excel in areas of science outside of the classroom through PJAS and her summer work at the University of Pennsylvania. Her projects are always complex, dynamic, and clearly of the college caliber. The Intel semifinalist award is a wonderful recognition of Reilly’s determination and dedication to science learning. I am so proud of her.”

Reilly credits Bethoney with sparking her interest in science and guiding her through the Intel submission process. “It is so inspiring to have a teacher who believes in you and really goes the extra mile to push you. I would not have been able to accomplish any of this without her.”

## *Creative Minds Work Together To Form New Civilizations*

Tired of the same old traditions? In need of a change of cultural pace? *Acoweastan*, *Lakestandia*, *Lolli-Pop Land*, and *Rocklandia* are a few of the alternative civilizations created by fourth-grade students. The project is designed to introduce students to the idea of how civilizations developed before they tackle the study of ancient Egypt and Greece. Students read the book *Weslandia*, by Paul Fleischman, to set the mood for the project. The young boy in the story spends the summer creating his own civilization, which revolved around a plant.

Teams of fourth graders worked for several weeks to produce a display detailing and illustrating what makes their civilization appealing and unique. Teacher Silvia Sollenberger Davis explained, “We really stay out of their way. It’s important for students to have the ‘pie in the sky’ ideas, and to work through both agreements and disagreements. The dynamic always ebbs and flows, but it is really special to watch them navigate the waters of collaboration in a truly sophisticated way.”

Noah Rossin '23 observed, “I liked that we had a lot of control over what happens in the project and what your civilization is like. It is extremely hard to make a civilization.” That team worked out their challenges and developed *Slashania*. Another student learned “you get a lot more done, if you work with other people.”

Fourth grade teachers Silvia Davis, Nancy Haas, Jeremy Hark, and Brendan Fitzpatrick, use the acronym of GRAPES to help students understand the main elements of social studies. G-geography, R-religion, A-achievements, P-politics, E-economics and S-sociology. Civilizations need to have all the GRAPES to work.

# on for the Future

## *Middle School FIRST® LEGO® League Team Wins Award*



FLL is a fall trimester elective in Middle School. The teachers are Ms. Linda Lew and Ms. Kristen Powell. Team members pictured are: 1 to r, in front, Ellie Baggini, Myles Peter, Harrison Malone, and Raunaq Singh and in back, Nikhil Kakarla, Jack Rebillard, Justin Chen, Peter Tang, Bing Quan, and Kevin Xiao.

Episcopal Academy's First® Lego® League Team was at The Franklin Institute all day on December 6 for their local FLL competition. There were three judging sessions (robot design, Core Values, and project) as well as a robot game. The team came in fourth in the robot game and won the Core Values award.

FLL provides students age 9 to 14 the opportunity to experience the fun of science and technology. In early fall, they send out a challenge related to a real world scientific topic. There are three parts: the robot game, the project,

and the FLL Core Values. Teams can have up to 10 members with two coaches. Teams “participate in the Challenge by programming an autonomous robot to score points on a themed playing field (Robot Game), developing a solution to a problem they have identified (Project), all guided by the FLL Core Values.

”According to the FLL website, FLL Core Values are the cornerstones of the FLL program. They are among the fundamental elements that distinguish FLL from other programs of its kind. By embracing the Core Values, participants learn that friendly competition and mutual gain are not separate goals, and that helping one another is the foundation of teamwork. The Core Values are:

We are a team.

We do the work to find solutions with guidance from our coaches and mentors.

We know our coaches and mentors don't have all the answers; we learn together.

We honor the spirit of friendly competition.

What we discover is more important than what we win.

We share our experiences with others.

We display Gracious Professionalism® and Coopertition® in everything we do.

We have FUN!

The Middle School's challenge was titled *Unleashing Your Musical Talent*. The challenge was: How can we teach an average person to play the piano in an innovative, low cost, and fun manner? They researched different methods of learning the piano, designed a prototype which consisted of a drawn keyboard attached to a virtual keyboard via a Makey Makey (an invention kit that turns everyday objects into touchpads and connects them with the internet). The students also created a project work book that included theory lessons, educational exercises, and technique.

The students had to test the prototype, survey the data, draw conclusions, work through the problems, and evaluate their success. They presented their data via PowerPoint presentation at the competition. Their project was an easy way to help kids learn the piano as well as making the experience fun and enjoyable. In addition, their prototype was both affordable and simple for musicians at all levels.

According to team member Harrison Malone, FLL has been an unforgettable experience. “Our team has gone through many difficult and stressful times, although the team has been able to overcome these obstacles. Throughout the last several months, I have come to the obvious realization that this FLL team is capable of accomplishing anything. Finally, we have been through tough times with each other which have turned this group of hard workers into a group of great friends.”

# Personal Decisions on Planne

## It Is Never Too Early To Leave A Legacy



Chip Bromley '00 is one of the youngest members of the BWW Society. As a professional wealth manager, Chip is very familiar with investments, retirement strategies, and estate planning, including charitable gifts. As he worked with his clients, he witnessed how many had charitable gifts as part of their overall financial goals and how they were fulfilled.

When Chip evaluated the charitable entities in his life, he decided that The Episcopal Academy had made a significant impact on his life. Chip was inspired by the culture of learning surrounding him when he arrived at EA in ninth grade. For the first time in his educational career, he realized the teachers wanted

him to learn and were on his side, not just trying to make him abide by the rules and do the work. He feels EA helps students move from thinking as children to thinking as adults. The new JTerm classes are examples of EA's direct approach to imparting a broader set of skills to students as they enter the real world, according to Chip.

Chip is a consistent donor to The Episcopal Fund each year, and as he was increasing his gift, he decided that he would take part of that gift and pay for an insurance policy that would have a greater impact on the school financially in the future. With EA as the named beneficiary of the policy, the school will receive the proceeds as part of Chip's estate. In addition, Chip has included EA more generally in his will and hopes to do more going forward. He feels doing this as a young person, when he does not have dependents, sets a precedent and will allow him to continue to expand his goals even as his personal circumstances change. It is never too early to write a will and start to plan for your financial life. He encourages all young adults to do the same.

## Now It Is My Turn – Bruce Stone '76



It is hard to describe how Episcopal has impacted my life. My first experience with EA occurred in September of 1962 when I arrived at Merion for my first day there. Throughout my 14 years as a student, EA continually shaped my life and helped to mold me into who I am today (for better or worse). During those chaotic teenage years of the early 1970's, it was EA that offered me a positive way to be me. To say I made life-long friends there is an understatement, but my attraction goes way beyond that.

EA became a fixture of my life well after my time as a student. In fact, EA defined me as I continued teaching there for 27 years. My family has been

associated with EA for three generations. My children graduated from EA, and two other members of my family still attend EA. One of the aspects of our family that I am most proud of is that there has been a member of our family on EA's campus continually since 1949.

The question really isn't why I support EA. Rather it should be; why not? A lot of the success in my life is a direct result of the school. Why should I not support it to the best of my ability so that it may become even better? Through my gifts, I am acknowledging that I had help along the way, and now it is my turn to reciprocate. I couldn't be more proud, and I am pleased to have joined the Bishop William White Society so that I can support EA long into the future as well as today.

## Episcopal Is Like Our Family



Len and Edna Haley have influenced the lives of hundreds of students during their time at The Episcopal Academy. Len, who has been at EA for 43 years, has held every job from Spanish teacher to Acting Head of Middle and Lower Schools to Facilities and Operations Director. For the last 28 years, Edna has been a dedicated and tireless first-grade teacher in the Lower School.

Everyone who knows Len will say that he is quick with a joke and that he is an incurable teaser, but when it comes to his family's dedication to EA, he is serious. Their three children were all lifers at Episcopal, and both Len and Edna say that many

of their friends are their colleagues and EA graduates. "Episcopal is a major part of our lives. It's like our family," he says.

Len recently joined the Office of Advancement where he learned a different side of what it takes to keep Episcopal a great institution. The Haleys have been loyal donors to The Episcopal Fund and are proud contributors to the Jay & Rosemary Crawford Endowment for Faculty Compensation. This year, however, they decided to cement their legacy as part of the Episcopal community by joining the Bishop William White Society.

"As we approach the twilight of our careers here, we know that every little bit counts," says Len. "We thought it would be good to give a donation to the Academy after we're gone." Though they say that their gift is modest, both Len and Edna agree that all gifts are critical to the continued successful operation of EA.

"Episcopal has given us so much," says Edna. "Our children received wonderful educations. We see wonderful things come out of an Episcopal education, and we wanted to be able to support EA as much as we could."

### PLANNED GIFTS AT THE EPISCOPAL ACADEMY 2012-2013

	Number of Gifts	Value
Realized Bequests and Other Planned Gifts	7	\$ 633,836
Deferred Gifts Established and Documented	7	\$ 218,500

## The Impact Of A Bequest

EA is most grateful for the generous bequest of Karl '41 and Patsy Rugart which funded the Arts Wing of the Crawford Campus Center. When the school was designing and building the Newtown Square Campus, Karl and Patsy were inspired by the prospect of creating first rate facilities for students engaging in the visual and performing arts. They provided the funding through an estate gift, which was received by the School this year upon Karl's passing. Episcopal will sadly miss Karl, Patsy and their loyal attendance at school functions, but it's heartening to know they were able to participate in the dedication of the Arts Wing and see how Episcopal's students and faculty used the facilities over the past seven years. This is a wonderful example of how the school benefits from the estate planning of our faithful constituents. The Rugarts were loyal, generous supporters of The Episcopal Academy and we thank them and their family.

# Bishop William White Society Luncheon

Bishop  
William White  
Society

Leading up to the Haverford/EA/Agnes Irwin Weekend in November, the BWW Society gathered for lunch in the Board Room overlooking the Clark Campus Green. Members had the opportunity to greet each other and meet the school's Administrative Team. New members of the team include Pete Anderson, Office of Admission; Terry Malone, Head of Lower School; and Ellen Urbanski, Office of Advancement.

Dr. T.J. Locke expressed how much he has enjoyed being at EA and how impressed he is with the faculty and students. He explained a little about EA's participation in the Global On-line Academy, an elite group of independent schools offering opportunities for our students and teachers to tackle courses that cannot be offered individually such as, Medical Problem Solving, Multivariable Calculus or Neuropsychology. For more information, visit <http://www.episcopalacademy.org/academics/global-online-academy/index.aspx>.

BWW Society members were also provided some insight into the college admission process that our students face from new Director of College Guidance, Cyndy Crum. Cyndy comes to us from the Whitfield School in St. Louis with 20 years of college guidance experience. As most of us knew, the college admission process has become extraordinarily competitive, and Cyndy explained the dynamics of colleges wanting better ratings in the media. The most important takeaway is that EA students do very well in the college admission process and are attending some of the most competitive schools. Cyndy is also focused on helping our students select the school that is best for each one of them and keeping the process less stressful.



## COMING UP

Alumni Weekend is right around the corner:  
Friday, May 1 and Saturday, May 2

Visit [www.episcopalacademy.org](http://www.episcopalacademy.org) for more details.