

# THE FOUNDATION'S Legacy NEWS

JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

## Three Philanthropists and Entrepreneurs Share Their Inspiring Journeys in Giving

To connect Foundation donors more deeply with their philanthropy, The Foundation recently hosted **Journeys in Giving**, an event exploring creative strategies for making philanthropy more engaging and gratifying. It featured a panel discussion with **Marcie Polier Swartz**, **Lorraine Segil**, and **Shari Foos**, three Foundation donors and entrepreneurs who have established their own nonprofit organizations.

FROM THE  
DESK OF MARVIN I. SCHOTLAND

PRESIDENT & CEO, JEWISH COMMUNITY FOUNDATION

The vicious attack at **Tree of Life Congregation** in Pittsburgh was an unfathomable tragedy for our people. Less than two weeks later, we in greater Los Angeles mourned the killings of college students and others in Thousand Oaks. In solidarity with Jews and our extended community, we will not stand down in the face of terror and violence. Our response to anti-Semitism and to hate in all of its destructive forms is **to give in a meaningful way**—to contribute to helping the victims and organizations fighting against hate. To that end, The Foundation made four emergency grants totaling \$200,000; see details on page 3.



Tragically, the destruction is coming from nature, too.

At press time, wildfires are devastating California. Thousands have lost their homes and businesses; dozens have lost their lives. We have heard of extensive damage to major Jewish institutions that we and our donors have long supported, including **Shalom Institute**, **Camp Hess Kramer**, **Gindling Hilltop Camp**, and **Ilan Ramon Day School**. Our donors immediately began helping in the best way possible: **by giving generous donations for relief efforts**. Though the extent of the damage is not yet known, in the months and years to come, we and our donor family will be supporting the rebuilding.

Quite appropriately, this edition of *Legacy* is all about giving. Giving and helping others is at the core—the heart and soul—of what we do. For example, our cover story features three Foundation donors/entrepreneurs who shared their stories of meaningful giving at our autumn **Journeys in Giving** luncheon. Many guests were inspired to discover

*Continued on back page*

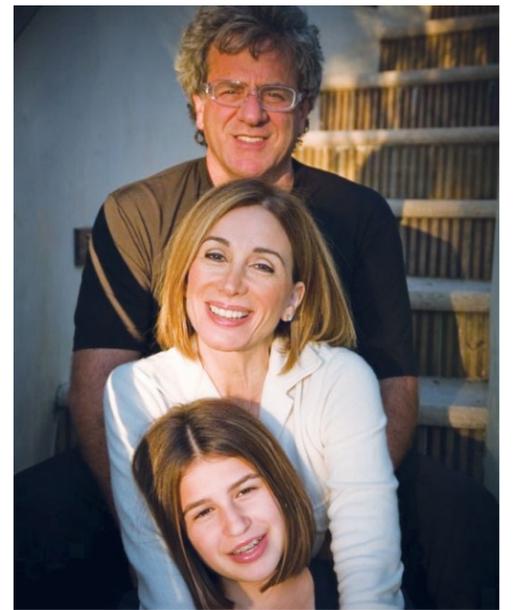


Julie Civiello Polier, Megan Swartz, Michael Polier, Marcie Polier Swartz, David Swartz, Hillary Tuck, Eric Swartz; and Curly and Charlie. Photos courtesy of Marcie Polier Swartz and Living Brentwood magazine, 2017.

Each one of our panelists spoke from the heart—their willingness to be open in sharing the ups and downs in their journeys was an inspiration to everyone in the room. They are three different women with distinct backgrounds and areas they are passionate about, but all share a unique strength and compassion that makes them amazing leaders in our community.

The inspiration provided by the panelists was palpable to everyone in the room. Here are highlights from their stories, along with their insights on how to give with more meaning.

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Shari Foos, husband Richard, and daughter Harley, 2007



Lorraine and Clive Segil with son, James Segil, daughter-in-law Dr. Donné Segil; and grandsons.

“Philanthropy is the melding of the heart and mind.” — Marcie Polier Swartz

## Marcie Polier Swartz: Problem-Solving With Passion and Instinct

Marcie Polier Swartz approaches her philanthropy with an entrepreneur’s spirit. It comes naturally. Her father was a successful small business owner, and in 1976, when Marcie was just 22, she founded **Entertainment Data, Inc.**, the first-ever overnight reporting of film box office grosses. She ultimately sold it to Nielsen 21 years later.

Through her giving, Marcie seeks to problem-solve by connecting the world’s needs to her passions and instincts. When Marcie and her husband, **David Swartz**, a CPA and managing partner of accounting firm **Good Swartz Brown & Berns, LLP**, sought to plan their philanthropy, Marcie happily relied on David’s expertise, which includes both his experience in finance and in serving as president of **Jewish Big Brothers of Los Angeles** and the **Los Angeles Jewish Home**. “Dave has been an active member of the community for many years,” Marcie explains. “One day he said, ‘Marcie, we need to get involved with The Foundation.’” They did so by creating a Donor Advised Fund.

By choosing to support causes that reflect her own life challenges, Marcie has been able to infuse her philanthropy with joy and healing. This includes supporting performing arts groups, caring for



Marcie Polier Swartz with Navy veteran brother Brad Zalben at the 2018 Veterans Affairs Homeless to Housed Stand Down for 1,000 homeless and low-income veterans.

orphaned children in war-torn nations, and peace in the Middle East. Ultimately, this led to her creating **Village for Vets**, the only community support group for the **Veterans Administration Greater Los Angeles Healthcare System**. She saw the need for this type of organization after experiencing first-hand the challenges faced by her brother, a U.S. Navy veteran, upon his return home.

Marcie also realizes the power of philanthropy in creating a family legacy. She established a Donor Advised Fund because “I wanted my children to get involved with my philanthropy,” she shared. “I’m hoping that the legacy will really be for them.” It’s important to her that this happens through The Foundation. As Marcie explained it, “My children will be able to work and grow with The Foundation and their professionals, and choose meaningful charitable gifts in the years to come.”

## Lorraine Segil: Empowerment Through Philanthropy

“Philanthropy, to me, is the manifestation of a dream in the present.” — Lorraine Segil



Lorraine at a retreat with the Exceptional Women Awardees she mentors, 2018.

After 40 years serving as CEO for companies in the aerospace, healthcare, professional services, and financial services industries, **Lorraine Segil** created the **Exceptional Women Awardees Foundation**, a nonprofit that mentors mid-career women poised to take on similar corporate leadership positions. “It’s so empowering to realize that what you’ve done has changed someone’s life and the lives of those around them forever,” Lorraine said.

## Journeys In Giving Event Attendees



Panelists Lorraine Segil, Marcie Polier Swartz, and Shari Foos (4th from left); The Foundation’s President & CEO Marvin I. Schotland; Natella Royzman, Director of Charitable Giving at The Foundation; and Elana Wien, Vice President of The Foundation’s Center for Designed Philanthropy



Nancy Berman,  
Shirley Ashkenas



Julie Bram, Alanna Bram, and Nancy Kahn



Rhea Coskey, Eileen Coskey Fracchia

Photo credit: Vivien Best



*"The more filled up you feel, the more you want to give it back."* — Shari Foos

In addition to now serving as that foundation's Chair and CEO, Lorraine also views her philanthropic giving through a similar vantage point. "I look at the opportunity to enable talented, high potential women to become powerful leaders across multiple industries nationally and globally," Lorraine stated.

Lorraine and her husband, **Dr. Clive Segil**, an orthopedic surgeon, chose The Foundation as stewards of their philanthropy because "We feel that The Foundation is aligned with our spiritual beliefs and values system," Lorraine explained. Clive does important work in the Jewish community, serving as a Board Member for the **Shalom Institute**. The Segils annually support a **Segil Farm Fellow** at the Institute, whom Clive teaches about urban farming, bee keeping and sustainable food production.

Eleven years ago, Lorraine created **The Lorraine Segil Endowment Fund** which gives scholarships and mentoring to women at the **Graziadio School of Business at Pepperdine University**; **Southwestern School of Law**; and her high school in South Africa, **Kingsmead School for Girls**. Lorraine also recently opened a Donor Advised Fund with The Foundation. She and Clive use The Foundation's **Center for Designed Philanthropy** to help them identify potential philanthropic partnerships. "If, as a philanthropist, you connect with and commit to the individuals to whom you are giving, the giving becomes personal and so much more meaningful," Lorraine explained.

Lorraine and Clive's son, **James Segil**, a successful entrepreneur, and daughter-in-law, **Dr. Donné Segil**, a pediatrician, also have a Donor Advised Fund with The Foundation, through which they focus on causes related to health, education, and basic needs. Lorraine noted with pride, "It's really a family affair."

### Continuing the Journey

Through the tapestry of causes that you care most about, passionate philanthropists can help heal the world, just like Marcie, Lorraine and Shari are doing. All of these families have wonderful connections to the Jewish Community Foundation. The Foundation is here to partner with you to help make your philanthropy as personal and meaningful as possible. ✖

## Shari Foos: Expanding Perspective and Deepening Empathy

"I care deeply about people, social justice and equality," **Shari Foos** stated. "It pains me to see injustice, but it pains me even more to see people taking that injustice that was thrust upon them and perpetuating it." It is for this reason that Shari founded **The Narrative Method**, a nonprofit providing an immersive group experience of storytelling and conversation that increases awareness, wonder, and empathy.



Shari Foos

Like the nonprofit she started, Shari views philanthropy as the practice of expanding our perspective and deepening our empathy. "We strive to do the things in the world that mean so much to us," Shari notes. "When you're connected to yourself, you're clear about both your passion and what your purpose is."

Shari is also a co-founder of **IKAR**, an innovative LA congregation. She is proud that Judaism is focused on *tikkun olam*—healing the world—and appreciates that it can potentially feel overwhelming because there is so much to heal. How can one person make a difference? "It's not our job to decide how important our role is," Shari explains, "but just to do our part." Her husband, **Richard Foos**, agrees. He is co-founder and chairman of **Shout! Factory**, a home video and music company, and **Rhino Records**. Richard is also passionate about social justice, serving on a variety of nonprofit boards in Los Angeles.

Along with close friends **Janet** and **Adlai Wertman**, the couple established the **Foos/Wertman Family Fund**, a Donor Advised Fund at The Foundation, in order to create a path for their children to grow through giving. Shari is grateful that The Foundation is there to lead the way. "I just think it's an incredible opportunity for people to have their hearts and hands held by The Foundation through the philanthropic process, because it can be complex. Being connected to an organization like that devoted to goodness and social justice, and every cause that happens to be your passion, is a really big deal."

## In solidarity **After the Pittsburgh Tragedy**



To support survivors of the tragedy at **Tree of Life Congregation** in Pittsburgh and in solidarity with the entire Jewish community, The Foundation has provided four emergency grants totaling \$200,000 to organizations that collectively support the victims' families and others; fight anti-Semitism; facilitate increased security at local Jewish institutions; and assist new immigrants. \$50,000 grants have been awarded to:

- **Victims of Terror Fund, Jewish Federation of Greater Los Angeles** ([jewishla.org](http://jewishla.org))
- **Community Security Initiative, Jewish Federation of Greater Los Angeles** ([jewishla.org](http://jewishla.org))
- **Anti-Defamation League** ([adl.org](http://adl.org))
- **Hebrew Immigrant Aid Society** ([hias.org](http://hias.org)). ✖

### In Memory

- Joyce Fienberg, 75, Z"l
- Richard Gottfried, 65, Z"l
- Rose Mallinger, 97, Z"l
- Jerry Rabinowitz, 66, Z"l
- Cecil Rosenthal, 59, Z"l
- David Rosenthal, 54, Z"l
- Bernice Simon, 84, Z"l
- Sylvan Simon, 86, Z"l
- Daniel Stein, 71, Z"l
- Melvin Wax, 88, Z"l
- Irving Younger, 69, Z"l

# GRANTEE SPOTLIGHT 2018 Israel and General



## Israel GRANTS

The Foundation recently awarded \$1.2 million in Israel Grants to six programs that address pluralistic Jewish identity and economic development and self-sufficiency in Israel.

### Jewish Identity

#### Ethiopian National Project

\$200,000/3 years

**School Performance and Community Empowerment** is an after-school program that provides Jewish identity enrichment, as well as academic and emotional support for Ethiopian Israeli students.

[www.enp.org.il](http://www.enp.org.il)



#### Meitarim

\$240,000/3 years

The **Strengthening Jewish Identity in Mixed Religious-Secular Jewish Education** program offers integrated Jewish curricula to thousands of students at schools throughout Israel.

[www.meitarim.org](http://www.meitarim.org)



#### Panim

\$190,000/3 years

**HaMovilim (the Leaders) – Senior Pluralistic Educators Leadership Development** provides hundreds of diverse Beit Midrash facilitators with training to effectively lead their communities.

[www.panim.org.il](http://www.panim.org.il)



### Economic Development/Self-Sufficiency

#### Amutat Kaima

\$230,000/3 years

The **Employment as Education Model** provides hands-on agricultural training and comprehensive workforce development for hundreds of at-risk youth.

[www.kaima.org.il](http://www.kaima.org.il)



#### Crossroads

\$140,000/3 years

The **Create Your Future Employment Center** provides immigrant at-risk youth with job training and therapeutic services to help them prepare for the workforce.

<http://crossroadsjerusalem.org>



#### JobKatif

\$200,000/3 years

The **Achotenu (Our Sisters)** program trains Ethiopian Israeli men and women in an academic nursing program.

[www.achotenu.org](http://www.achotenu.org)



## On the Ground in Israel

This past spring, Vice President **Elana Wien** and Senior Program Officer **Naomi Strongin**, both of The Foundation's **Center for Designed Philanthropy**, had the privilege of joining Israel Grants Committee Chair **Selwyn Gerber** in Israel to meet with The Foundation's current and prospective Israel Grant recipients. For many years, Selwyn has been traveling to Israel to visit many of the organizations involved in our grants program, both applicants and prior grantees. He works together with **Alan Gindi**, Vice Chair of the Israel Grants Committee, to lead our Israel grantmaking.

"We were so impressed with the quality of these organizations and the vital work they're doing," Naomi reported. The trip also allowed The Foundation to connect with like-minded private foundations committing their resources to Israel. "It was an incredible networking opportunity to meet with other foundations conducting similar work and to explore potential collaborations," Elana said. "And we were honored to learn that they consider The Foundation to be an important and influential funder in Israel." Since 2010, The Foundation has awarded nearly \$10 million in Israel Grants to more than 60 organizations. ✖



Elana Wien and Naomi Strongin (center) onsite in Israel at Foundation grant recipient Unistream, earlier this year. Photo credit: Rebecca Kowalsky.

# Community Grants Awarded!

THE FOUNDATION  
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LOS ANGELES



## General Community GRANTS

The Foundation awarded a record-high \$490,000 in General Community Grants to seven organizations that help low-income individuals who face barriers to employment find jobs or start and expand their own microbusinesses. Each organization will receive \$70,000 over two years.

### Paths out of Poverty Through Social Enterprise and Entrepreneurship

#### Chrysalis

\$70,000/2 years

**Direct Hire** will train and place hard-to-hire individuals from its street maintenance social enterprise program with employers.

<https://changelives.org>



#### Coalition for Responsible Community Development

\$70,000/2 years

**CRCD Enterprises** will provide at-risk youth in South Los Angeles with construction and street maintenance job training and experience.

[www.coalitionrcd.org](http://www.coalitionrcd.org)



#### Downtown Women's Center

\$70,000/2 years

**MADE by DWC** will provide women experiencing homelessness with retail job training and experience.

[www.downtownwomenscenter.org](http://www.downtownwomenscenter.org)



#### Grameen America

\$70,000/2 years

**Grameen Los Angeles** will provide financial training and microbusiness loans to low-income women in Boyle Heights and Pico Union.

[www.grameenamerica.org](http://www.grameenamerica.org)



#### Homeboy Industries

\$70,000/2 years

The **Therapeutic Community and Social Enterprise Re-Entry Program** will provide therapy, job training, and work experience to former gang members.

[www.homeboyindustries.org](http://www.homeboyindustries.org)



#### Opportunity Fund

\$70,000/2 years

The **Los Angeles Small Business Impact Fund** will provide microloans to low-income entrepreneurs.

[www.opportunityfund.org](http://www.opportunityfund.org)



#### Valley Economic Development Fund

\$70,000/2 years

**Women's Entrepreneur Center** will provide one-on-one consulting, specialized business workshops, and entrepreneurial training to women entrepreneurs in the San Fernando Valley. ✨

<https://vedc.org>



To learn more about The Foundation's grantees, visit [www.jewishfoundationla.org/grantees](http://www.jewishfoundationla.org/grantees).

# EVENTS

## Strategies for Addressing Homelessness



Foundation President & CEO Marvin I. Schotland (2nd from left), with some members of The Foundation's Board of Trustees. (L to R) Keenan L. Wolens, Larry Rauch, Cathy Siegel Weiss, Mindy Freedman, Karen Sandler, Allan B. Cutrow, Anthony Chanin, Mark N. Schwartz, Sam S. Yebri, and Bertrand Ginsberg



Panelists Rabbi Noah Farkas, Andrea Ilouliau, Estela Lopez, and Tommy Newman (5th from left); Warren Fong, Program Officer in The Foundation's Center for Designed Philanthropy (4th from left).



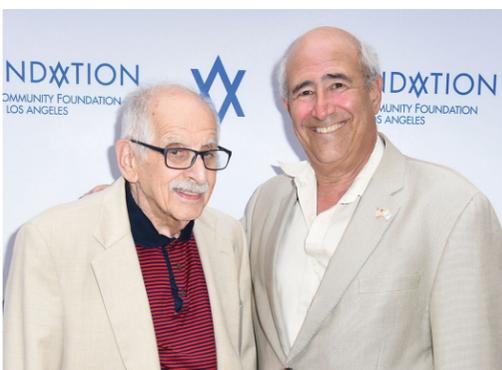
Cathy Siegel Weiss & Ken Weiss



Myron & Arlene Lieberman



Deborah & Howard Klein



Harold Igdaloff and Robert Aronoff

As part of our educational commitment to addressing pressing needs in Los Angeles, we create events that bring together leading experts with Foundation donors.

This past August in Beverly Hills, at the beautiful home of Foundation Trustee **Keenan Wolens** and his wife, **Orna**, donors and Foundation leadership gathered to learn more about the challenging issue of homelessness in Los Angeles.

We were joined by a panel of dedicated experts on the frontline of this issue: **Rabbi Noah Farkas** of **Valley Beth Shalom** and **Los Angeles Homeless Services Authority**; **Andrea Ilouliau** of the **Conrad N. Hilton Foundation**; **Estela Lopez** of the **LA Downtown Industrial District Business Improvement District**; and **Tommy Newman** of **United Way of Greater Los Angeles**.

Moderated by **Warren Fong**, Program Officer in The Foundation's **Center for Designed Philanthropy**, the panelists shared with us their deep understanding of homelessness in Los Angeles, and the effective programs they are leading to help alleviate it. "While homelessness is a complex and daunting issue affecting every part of Los Angeles, I believe that together The Foundation and its donors can make a difference, helping people get off the street and into a home," Warren shared. "I have seen the transformational impact that providing a home and a helping hand can have for people who are down on their luck or suffering from any number of conditions. And I am encouraged by the number of donors who attended this event and continue to show up for those in need." ✖



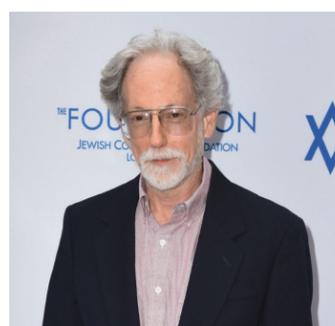
Orna & Keenan Wolens, and daughter Alana



Norie Gold and Jan Berfein Burns



Greg & Andrea Smith



Henry Morgen



Lael Rubin and Ron Blanc



Julie Bram and Mindy Freedman

## The Clock is Ticking: Take Advantage of Smart Year-End Giving Strategies

At the Jewish Community Foundation of Los Angeles, we're here to help you engage in effective philanthropy, particularly at this time of the year when charitable giving is foremost on many people's minds. Now that the standard deduction has changed, many people are rethinking their giving strategies. If you'd like to conclude 2018 on a very positive note, please consider taking advantage of these smart year-end giving strategies:

### Open a Donor Advised Fund

One of the most powerful ways to enhance your charitable giving is through a **Donor Advised Fund**—essentially a charitable checking account—at The Foundation, which offers you convenience and flexibility with your donations. We streamline the entire process by handling the administrative responsibilities, freeing you to focus on the joy of giving, just like the innovative donors in our cover story, **Marcie Polier Swartz, Lorraine Segil, and Shari Foos**, all of whom have established Donor Advised Funds with us.

You can open a fund with an initial contribution of \$5,000 or more in cash, securities, real estate, or other assets and then make grants to your favorite charities on your own schedule. We also offer investment options to potentially grow your charitable resources. Furthermore, the professionals at our **Center for Designed Philanthropy** provide complimentary consultations and educational programs on how to give more effectively. For example, we can help you determine which causes or programs to support based on your passions and fields of interest.

Opening a Donor Advised Fund with The Foundation is a meaningful and convenient way to create a charitable legacy for you and your family.

### Apply a Bunching Strategy for a Tax Deduction

Charitable contributions are still deductible under new tax laws. Through a strategy called "**bunching**," you can combine the charitable contributions you plan to make over several years into a single year to qualify for itemized deductions, and then alternate between the years that you will take the standard deduction and the years that you will itemize. With a Donor Advised Fund, bunching can afford an optimal method to itemize contributions, receive a deduction on the full amount of those charitable gifts, and ensure that the causes you care about continue to receive consistent contributions.

To learn more, please contact us at 323.761.8704 or [development@jewishfoundationla.org](mailto:development@jewishfoundationla.org).



### Create an Endowment Fund With an IRA Charitable Gift

An Endowment Fund is a charitable fund that supports one or more of your favorite charities or causes in perpetuity. It will be invested for generations to come, and every year, it will be distributed to your chosen charities.

One easy way to create an Endowment Fund is by funding it through an **IRA charitable gift**. If you are age 70½ or over and have a Traditional, Rollover, SEP, or SIMPLE IRA, the law requires that you take Required Minimum Distributions annually. You may transfer up to \$100,000 per year directly from your IRA to a new or existing Endowment Fund at The Foundation and receive an immediate tax deduction. Or if you prefer, your contribution—or a portion of it—can also fund our Permanent Legacy Fund, which supports Foundation grantmaking throughout the community. Note that distributions from IRAs cannot be made to Donor Advised Funds.

To create an Endowment Fund using an IRA gift, please contact us and your IRA plan administrator to transfer assets directly to The Foundation by **December 31, 2018**. ✦



**For your convenience, Donor Services Online is available 24/7. Log in at <https://secure.jewishfoundationla.org>**

### Year-End Giving Deadline

The Foundation's office closes on **December 31, 2018, at 5 p.m.**

Please submit your donations or designate your grants as soon as possible to ensure all transactions are completed before year end.

IN THIS  
ISSUE

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- Smart Year-End Giving Strategies

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causes that resonate with them, and to explore new ways to support them more meaningfully. Another Foundation event addressed the issue of homelessness with a panel of experts at the home of our Trustee **Keenan Wolens** and his wife, **Orna**. It motivated the audience to consider new ways to give of their time and resources to help solve this complex issue.

Our new **Israel Grants** and **General Community Grants** represent one of the cornerstones of our institutional giving. In support of our Israel Grants program, Foundation Trustee **Selwyn Gerber**, our Israel Grants Committee Chair, along with **Elana Wien**, Vice President of our **Center for Designed Philanthropy**, and Senior Program Officer **Naomi Strongin**, visited Israel to meet with current and prospective grantees and gain invaluable on-the-ground knowledge. This year's **General Community Grantees** provide opportunities for those Angelenos on the margins to re-enter the workforce, transform their lives, and build a pathway to self-sufficiency.

With year-end just around the corner, we encourage you to give generously to the causes you're passionate about. Through our mutual giving, may we help to heal the pain and suffering around us, and may we be fortunate to experience a peaceful 2019 full of blessings for all. ✧



Happy Chanukkah

## Mensches Honored at The Foundation

This fall, The Foundation hosted an uplifting luncheon to honor the recipients of the *Jewish Journal's* "Mensch List" awards given to outstanding community volunteers. "Like our Foundation donors, these mensches lead by example as they make our world a better place," said **Marvin I. Schotland**, The Foundation's President & CEO.



(L-R, standing) Dan Rothblatt, EVP, and Marvin I. Schotland, President & CEO, The Foundation; David Nimmer; Mel Wacks; Nancy Mishkin; Bruce Rosen; Michael Ullman; David Suissa, Publisher & Editor-in-Chief, Jewish Journal; and Rachel Sumekh. (L-R, seated) Victoria Nodiff-Netanel, Betty Cohen, and Alana Yakolev. Photo credit: Leah Lau.

"It's a great privilege to acknowledge them for their contributions." The mensches shared inspiring stories of their volunteerism helping the most vulnerable members of society, and were able to learn from each other's experiences. ✧

## THE FOUNDATION'S Legacy NEWS

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