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www.caltechy.org

2020 ANNUAL REPORT
On my first day as a young staff consultant at Price Waterhouse, the global professional services firm now known as PwC, I was at my desk when a mailroom associate dropped by with a delivery. He reached into his cart, handed me an envelope, and with a smile said, “Welcome to the firm!”

Curious, I immediately opened the envelope and discovered my copy of the Los Angeles Office Alumni Directory. Apparently, my new employer referred to former colleagues as “alumni” of the firm unless, of course, they resigned to join a competitor – one of the other “Big 8” accounting firms – in which case, their name was unceremoniously deleted from the directory. All the others though, whether they had left in good standing or were asked to leave, could be found in the directory and would forever be a part of the Price Waterhouse “family”.

The pandemic has highlighted the importance of family and being part of a community. With the sudden shift to remote learning, working from home, and social distancing, the Caltech Y continued to program virtually, including student programs, Friends webinars, and email updates. Although these intentional virtual efforts were not the same as meeting in person, we hoped to maintain these important connections to foster a sense of community.

This annual report focuses on those connections and the Y’s efforts to stay mission driven. As a Friend of the Caltech Y, you are part of the “family” and an important member of our community. Thank you for your support during this challenging year.

It has been a joy and an inspiration to serve as the Y’s student ExComm president during an unprecedented time. 2020 has been full of unique challenges. Caltech and institutions around the world transitioned to online models, fundamentally changing the ways in which we learn and engage. Amidst the challenges, we have seen versatility and new opportunities. During a time that can be isolating, the Caltech Y provided avenues of connection. The ExComm and student leadership continued to meet regularly and plan new programming adapted to the virtual environment. Technology brought together the Caltech community and speakers from all over the world to discuss timely social issues. Students were also motivated to serve their communities, leading to a record number of participants in the Caltech Y’s tutoring programs. With these programs and others, such as the Science Policy Symposium, the Virtual Community Service and Advocacy Fair, and the Adventure 101 series, the Y continued to build community around our five pillars of leadership, civic engagement, adventure, service, and perspective.

Although my senior year at Caltech has progressed in unexpected ways, I am thankful for the consistent presence of the Caltech Y, linking both in-person and online experiences. For me and so many others, the Caltech Y has been a central part of my experience at Caltech. This is made possible by your support. Thank you for your commitment to students and the Caltech Y. We are grateful for the opportunities to stay connected.
MEET THE STUDENT LEADERS

Caltech Y programs are only possible thanks to the hard work of the many student leaders. The Y student ExComm is the primary planning group, but Y staff also work with several other outstanding committees and individuals, highlighted here and in the next few pages.

Student Executive Committee

ExComm Members on the Board
Student Leaders (continued)

"We are all working hard to ensure that the Y continues to serve as a resource for students, complementing students’ academic experiences with other opportunities to engage the community."

Sunny Cui, BS ’20
Student ExComm President 2019

"I have been able to access the outdoors and go to a lot of places I wouldn’t have known about or been able to go without the knowledge and support of the Y. Being a part of the community at the Y is among the best choices I have made at Caltech."

Rebecca Gallivan

RISE ADVISORY COMMITTEE
Michael Anaya
Rupesh Jeyaram
Zoila Jurado Quiroga
Alexandra (Alex) Phillips
Iman Wahle

"Outreach is more than a line item on a grant. It is a promise to our communities to give back some of the privilege we have…"

Alexandra (Alex) Phillips

Y OUTDOORS COMMITTEE
Julie Andre
Camille Bernal
Sydney Corona
Rebecca Gallivan
Ben Herren
Toussaint Pegues
Kathryn Plant
Cullen Quine
Jimmy Ragan
Eitan Rapaport
Jillian Reed
Danny Sawyer

"[The Y] has given me an outlet for so many activities and interests that I would not have been able to pursue otherwise. The work I have done with science policy at the Y has shaped my desire to pursue a career in that field."

Kathleen Kennedy

STUDENT ACTIVISM SPEAKER SERIES COMMITTEE
Zoe Beatty
Sarah Cohen
Manni He
Kathleen Kennedy
Kai Matsuka
Eliza O’Reilly
Elyse Pennington
Ben Riviere

"Outreach is more than a line item on a grant. It is a promise to our communities to give back some of the privilege we have…"

Alexandra (Alex) Phillips

ONGOING SERVICE PROJECT LEADERS
Hathaway Sycamores, Union Station, Kids Reading to Succeed, Pasadena LEARNs
Alexander Dalzell
Hazell Dilmore
Rupesh Jeyaram
Zoila Jurado Quiroga
Rebekah Silva
Iman Wahle
Helena Wu
Jennifer Yu
Alexander Zlokapa

"I’ve really enjoyed volunteering for the Union Station Program because it gave me the chance to combine my love of cooking and baking with something that addresses the real need in the Pasadena community. This is really shaping my perspective and giving me a better understanding of those around me."

Iman Wahle

*If you would like to learn more about students’ experiences at the Caltech Y, please visit our digital 2019-20 Annual Report at www.caltechy.org.
Despite the challenges of COVID-19, student leaders coordinated some amazing programs. Thanks to their hard work, the Caltech Y offered an array of options to stay connected, engage with thought-provoking speakers and presenters, and have fun!

**Community Service**
- Community Service & Advocacy Fair
- Friends In Deed Hygiene Product Drive (co-sponsored with The Interhouse Committee)
- Young & Healthy Toiletry Kits
- Amigos de los Rios Tree Planting (co-sponsored with Techers for a Sustainable World)
- Marshall Credit Recovery Program
- Mentors for Life
- Pasadena LEARNS
- Orientation Service Project with Union Station
- Kids Reading to Succeed
- Hathaway Sycamores Family Services
- Make-A-Difference Weeks: Virtual Volunteering

**Social Programs**
- Orientation Open House
- Caltech COVID Cookbook
- Explore LA
  - Frozen: The Musical
  - Holiday Magic at Disneyland
  - Lakers vs. Grizzlies
  - Natural History Museum
  - Pasadena Symphony
  - UCLA Gymnastics vs. Utah
  - LA Zoo Lights
- Fall Decompression

**Outdoor Adventures**
- Adventure 101
  - Hiking Options in the Greater LA Area
- Yosemite Y-Hike Pre-Orientation Trip
- Day Trips
  - Beaudry Loop Hike
  - Ice House Canyon Hike
  - Los Liones Hike
  - Mt. Isidro Hike
  - Fly Fishing
  - Big Bear Ski Trip
- National Park Camping Trips
  - Joshua Tree
  - Red Rocks
- Wilderness First Aid Training
  (co-sponsored with the Alpine Club and supported by the Moore-Hufstedler Fund)

**Cultural & Educational Programs**
- India ki Khoj Cultural Trip
  (co-sponsored with the Indian Institute of Technology, Chandigarh & the Caltech Summer Undergraduate Research Fellowships Program)
- Washington, DC Science Policy Trip
- Lunch & Learn
  - Fraud and Predatory Lending Targeting College Students: Deter, Detect, Defend Against Identity Theft (co-sponsored with CEFCU)
- World Fest
  (co-sponsored with International Student Programs)
  - Italian Pasta Making Zoom Demonstration
  - Journey to India Zoom Talk
  - Journey to the Northern Lights Zoom Talk
  - Virtual International Food Fair & Culture Show
- Student Activism Speaker Series (SASS)
  - Black LA: A Conversation with Dr. Darnell Hunt, Moderated by Dr. Danielle Wiggins
  - The California Housing Crisis, an Overview: Lunch Talk with Liam Dillon of the LA Times
  - Electrifying LA’s Green New Deal: Webinar with Michael Samulon

**MLK Commemoration Week**
(co-sponsored with the Caltech Center for Inclusion & Diversity)
- MLK Service: A Day On, Not Off at Muir High School
- MLK 2020 Keynote: Featuring Alumna Dr. Schetema Nealy
2020 STUDENT AWARDS

Patrick Hummel & Harry Gray Travel Fund
Rita Aksenfeld, Isabella Campilsson, Elisabeth Gallmeier, Jeff Ma, Iman Wahle, and David Wu

The Patrick Hummel and Harry Gray Travel Fund was established as a joint gift from Carla & Paul Hummel, Patrick Hummel, and Shirley & Harry Gray, Arnold Beckman Professor of Chemistry. The fund supports travel opportunities for undergraduate students to promote professional and leadership development and broaden students' perspectives as engaged, responsible citizens of the world.

Lucy Guernsey Service Award
Alexandra (Alex) Phillips
Iman Wahle

Initiated in 1992 by the Caltech Y ExComm in honor of Lucy Guernsey, the Caltech Y’s Executive Director from 1989-1992, in recognition of her leadership, dedication to students, and diligence in furthering the Y’s commitment to volunteerism.
2019-20 INDIVIDUAL DONORS

We are GRATEFUL to the hundreds of people who support our mission through the annual campaign and additional contributions. Here, we recognize those who have donated so generously this past year from October 1, 2019, through September 30, 2020. Thank you!

Visionary
John and Virginia Geoffrey Rolf and Gunilla Hastrup
Cheryl Kane
Susan Murakami and Lee Fisher
Phil and Nancy Naecker
Lajos Piko
Rainer Schaaf

Wes Hershey
Richard Beatty
Sunney and Irene Chan
Fred and Susan Clayton
Harry and Shirley Gray
Vashn Kamar
Mike and Paula Stefanko
Mary Wahl and Nick Hutzler

Benefactor
Matt Cedeno
Michelle Jiang
Ravi and Sandhya Ravichandran* Doris Shimabukuro*

Patron
Jean Andino
Maitreyi Ashok
Laurence and Frederick Balian* Jim Berger
Jim and Janet Black
Kim and Ginger Caldwell
Don and Judy Collins
Chris and Ellen Dalton
Dan and Vicki Erickson
Thomas Rosenbaum and
Katherine Faber*
David Cakenheimer
Nick and Daisy Gersdorff
Nancy Lan and John Hall
Peter Hung
Melany Hunt and Bruce Drolen*
Toni Perpall
Larry Muray
Larry Martinez*
Bob Logan*
Welby Lai*
John and Jennifer Kelly
Michele Judd*
Suzy Tcheng

Women

40x101

40x122

40x133

40x144

40x156

40x167

40x178

40x189

40x201

40x212

40x223

40x234

40x257

40x279

40x291

40x302

40x324

40x358

40x369

40x381

40x409

40x430

40x453

40x464

40x487

40x508

40x523

40x547

40x559

40x576

40x598

40x602

40x626

40x642

40x667

40x680

40x692

40x706

40x718

40x730

40x752

40x764

40x786

40x808

40x830

40x852

40x874

40x896

40x918

40x940

40x962

40x984

2019-2020 Caltech Y Annual Report

California Institute of Technology*

*Contributors with an asterisk donate to the Caltech Y via the Caltech United Way campaign, during which time their gifts are matched dollar for dollar by the California Institute of Technology.
## CALTECH Y BALANCE SHEET as of 9/30/20

### Assets

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash ($91,160 restricted for endowment)</td>
<td></td>
</tr>
<tr>
<td>Receivables and Prepaid Expenses</td>
<td></td>
</tr>
<tr>
<td>Endowment Fund Investments</td>
<td>3,421,074</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$ 3,543,858</td>
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</tbody>
</table>

The Institute holds income beneficiary funds for the benefit of the Caltech Y, with valuation and annual income of approximately $1,620,000 and $80,000, respectively.

### Liabilities and Fund Balances

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td></td>
</tr>
<tr>
<td>CIT Accounts Payable</td>
<td></td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td></td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>$ 72,961</td>
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</tbody>
</table>

### Fund Balances

<table>
<thead>
<tr>
<th>Fund Balances</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Fund</td>
<td>($42,538)</td>
</tr>
<tr>
<td>General Endowment Fund</td>
<td>1,206,055</td>
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<tr>
<td>Caltech Y Centennial Endowment Fund</td>
<td>896,224</td>
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<tr>
<td>Ingrid Gumpel Memorial Endowment Fund</td>
<td>318,247</td>
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<tr>
<td>Wes Horday Memorial Endowment Fund</td>
<td>113,140</td>
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<tr>
<td>T. Stanley &amp; Mary Johnson Endowment Fund</td>
<td>100,658</td>
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<tr>
<td>George Housner Endowment Fund</td>
<td>162,793</td>
</tr>
<tr>
<td>Naecker Family Endowment Fund</td>
<td>122,984</td>
</tr>
<tr>
<td>Mary K. Beschorman Endowment Fund</td>
<td>100,641</td>
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<tr>
<td>Patrick Hummel &amp; Harry Gray Endowment Fund</td>
<td>130,942</td>
</tr>
<tr>
<td>Kirk &amp; Marjory Davison Endowment Fund</td>
<td>56,238</td>
</tr>
<tr>
<td>Paul &amp; Heather Haaga Endowment Fund</td>
<td>52,846</td>
</tr>
<tr>
<td>Tom M. Apostol Memorial Fund for Outreach</td>
<td>54,827</td>
</tr>
<tr>
<td>Paul Studentski Memorial Endowment Fund</td>
<td>189,110</td>
</tr>
<tr>
<td>Total Fund Balance</td>
<td>$ 3,470,897</td>
</tr>
<tr>
<td>Total Liabilities &amp; Fund Balances</td>
<td>$ 3,543,858</td>
</tr>
</tbody>
</table>

### REVENUE & EXPENSES year ending 9/30/20

#### REVENUE & SUPPORT

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and Grants *</td>
<td></td>
</tr>
<tr>
<td>Endowment Income</td>
<td>197,707</td>
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<tr>
<td>Program Service Revenue</td>
<td>41,650</td>
</tr>
<tr>
<td>Total Revenue and Support</td>
<td>$ 823,553</td>
</tr>
</tbody>
</table>

*Includes donations restricted for the endowment, totaling $70,145

#### EXPENSES

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Program Activities</td>
<td>$ 636,419</td>
</tr>
<tr>
<td>Management and General</td>
<td>108,745</td>
</tr>
<tr>
<td>Development</td>
<td>99,941</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$ 845,105</td>
</tr>
<tr>
<td>Excess (Deficit) of Revenue over Expenses</td>
<td>($21,590)</td>
</tr>
</tbody>
</table>

The Caltech Y would like to thank the following campus groups, foundations, companies, and community groups for their contributions and sponsorships.

### CALTECH DEPARTMENTS & CAMPUS GROUPS

Alpine Club  
Alumni Association  
Associated Students of the California Institute of Technology (ASCIT)  
Athenaeum  
Caltech Center for Inclusion and Diversity (CCID)  
Caltech Fund  
Caltech International Offices  
Caltech Management Association (CMA)  
Caltech Women’s Club (CWC)  
Center for Teaching, Learning & Outreach (CTLO)  
Division of Student Affairs  
George Housner Fund  
Graduate Student Council (GSC)  
Moore-Hufstedler Fund  
Student Faculty Programs Office  

### FOUNDATIONS, COMPANIES, & COMMUNITY GROUPS

Caltech Employees Federal Credit Union  
Enterprise Holdings Foundation  
Frank & Elsie Stefanko Fund  
La Cañada Eye Care Optometry  
PCL Construction  
TIAA
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