

**Big
Shoulders
Fund.**

Transform.

2009 YEAR-END REVIEW.

JUNE 1, 2008 TO JULY 31, 2009

Transform.

It's growth. It's change.
It's challenge. You make it
happen, or it happens to you.

The Big Shoulders Fund focuses
on taking the opportunities of
the moment and transforming
them to work for the children in
the inner-city Catholic Schools
of Chicago.

What follows is the story of Big
Shoulders transformative work
and how it touches the lives of
so many children.

Look Who's New at St. Malachy School!



How can you invest to **transform**?

Kimberly Querrey and Louis Simpson

Charitable contributions can be seen as simple investments to sustain an organization that's doing great work. Or, they can be investments that cause transformative change to established, underperforming systems. Inner-city education is a great example. It's not a place you'd expect to find a fearless willingness to cause change. Yet, the Big Shoulders Fund has helped transform existing educational institutions into agents for change in some of the most poverty-stricken neighborhoods in the city. They do this by relentless and consistent execution, yes, but also by pouring energy, treasure and commitment into new ideas like the Patrons Program, the Auxiliary Board and scholarship programs that follow students over a period of time to provide accountability and consistency. Big Shoulders' programs facilitate truly change-producing ideas that engage youth, energy and professional expertise where it's needed most.

Extended Day Programs.

We've found that when you're keeping students engaged after school, there's even more motivation during the regular school day.

Afterschool programming has been a mainstay at most Big Shoulders Fund schools for years. With many parents working long hours in the high poverty communities Big Shoulders serves, children often need to arrive early and be cared for after school for several hours.

In recent years, Big Shoulders has been working hard to ensure that after school care is not just babysitting but a true extension of the learning day. The goal is to introduce quality programs that can have a real impact on student growth and development. The students served by Big Shoulders often arrive at school already facing academic deficits and finding ways to utilize this precious time to effectively increase student knowledge and skills allows schools to help close the achievement gap.

Big Shoulders Fund has partnered with the Lloyd A. Fry Foundation, People's Energy and Union Pacific toward these goals. Over the past school year, 34 schools received \$160,000 in funding to enhance their programs, reaching nearly 3,000 students.

Over the past few years, Big Shoulders has been piloting a program to increase the technical assistance and training available to extended day program directors and teachers. This year, all participating schools were able to receive training and assistance from Learning Point Associates, an educational consulting group. Learning Point evaluates after school programs and works with administrators and teachers to improve the programs through seminars and teacher training.

"It is such an asset to have someone working closely with the school leaders on the importance of after school programs," said Joshua Hale, executive director for the Big Shoulders Fund.

There are indicators that the effort is already paying off. Students who stay for after-school programs in some Big Shoulders schools scored two points higher on standardized test scores than those who didn't attend the programs, Hale reported.

Schools with more highly structured programs, rather than simple homework time, tend to have the best results. For instance, students at St. Catherine of Siena/St. Lucy in the Austin neighborhood pick different after school "electives" to attend for six to eight-week periods throughout the school year. The program gives students freedom to select activities fitting their interests, which helps motivate them to come to school every day and be well-prepared for class as that is a pre-requisite for participation as well. At St. Helen School in the West Town neighborhood, there are a wide variety of clubs, from a cooking class to foreign language, science, math, earth and service clubs.



Through project-based learning, connections are made to curricular goals, allowing students to extend their learning and apply their new skills gained during the school day to more real-life situations. "We've found that when you're keeping students engaged after school, there's even more motivation during the regular school day as well," Hale said. "... We continue to see a big impact from these programs, well beyond the initial investments."

Professional Development – Broadening Teacher Knowledge and Engaging Students.

As research clearly indicates, one of the most important ways to significantly enhance student learning is to invest in the training and support of teachers.

With ongoing investments from The Searle Funds at The Chicago Community Trust and other funders, the Big Shoulders Fund has provided targeted professional development to over 2,000 teachers and administrators over the past four years.

A \$500,000 investment from the Searle Funds at The Chicago Community Trust for the 2009-10 school year has been invested in a variety of key areas, including: improvements in math and science instruction and content knowledge, the use of assessments to inform instruction, the integration of technology into teaching and learning, differentiated instruction and curriculum mapping.

In line with the mission of The Trust, the funding is expected to improve the rigor of instruction so students can really be challenged to reach the next level, said Gudelia Lopez, senior program officer for The Trust. As such, this funding supports training programs for teachers working toward additional endorsements for targeted subject areas such as math and science.

“We need to constantly go back to the need to increase the knowledge teachers have in the subject area they’re teaching,” Lopez said. “Providing support for additional endorsements is one great way to increase that knowledge... as we’ve seen in the evaluations of our work with Chicago Public Schools, the more teachers know, the more students are learning over time and the better the instruction is.”

The Trust is also encouraged by Big Shoulders recent efforts to focus on the big picture for its system, as opposed to individual programs at specific schools, Lopez said. She said with the same professional development goals for all its schools, Big Shoulders can have a bigger impact on student learning.

“This work does take time,” Lopez said “... You don’t want to go for specific programs (at

individual schools), but instead change your overall approaches and for an extended period of time. This is where the sustained support from us can be really helpful.”

To improve instruction in Big Shoulders schools, much of the funding has been focused on integrating interactive white board technology. Now, some 60 classrooms have the whiteboards, which have been highly effective in engaging students. The whiteboards also provide more immediate feedback for teachers on whether students are catching on to a lesson because their answers are instantly programmed for the teachers to track and assess in formative ways.



Teachers with the whiteboards also received one-to-one coaching in the use of the technology so they could really master it. “For our schools to stay competitive and to give the highest quality education possible, this is critical,” Executive Director Josh Hale said, “especially in the inner-city, where students often enter our schools already facing a deficit.”

Sister Marion Cypser, principal of St. Catherine of Siena-St. Lucy elementary school in the Austin neighborhood, said the boards have made a dramatic impact in less than two years. Today, the boards are in all 10 classrooms, plus the faculty and computer rooms at her school.

When introduced to the boards several years ago, Sister Marion said she thought they might just be a “glorified overhead” with a hefty price tag of about \$5,000 each. But after visiting classrooms that use the technology, she and her staff were completely sold on the boards’ ability to bring lessons to life.

The interactive white boards take classroom technology beyond a projector or blackboard because students can immediately engage with them, much like they do with an electronic game or advanced computer. There are also handheld devices for each student, allowing them to give the teacher instant feedback on whether they’re following a lesson.

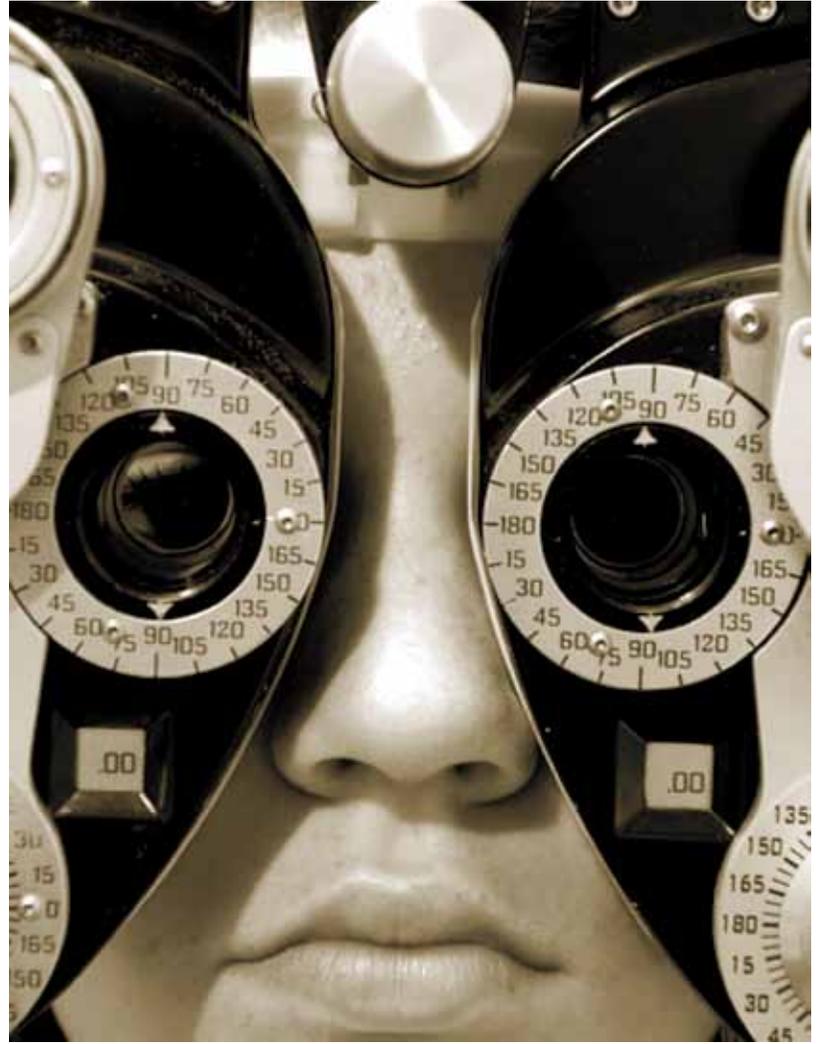
“We use them 24/7. They are totally integrated into our curriculum now,” said Sister Marion. “I honestly don’t think our teachers could teach without them now.”

She said teachers also use a computer program that downloads short film clips to the boards, helping dramatically illustrate a lesson. For instance, a teacher could spontaneously download a two-minute film clip of animals in the Sahara desert if she wanted to give them a more vivid picture of the region.

While the boards have not been in place long enough to measure their full impact on student learning, Sister Marion is convinced they’re already having a huge effect on her students, most of whom live in poverty and benefit from any additional resources the school can provide.

“The children are clearly more engaged in learning and if they’re more engaged, we know that long-term it will mean their achievement will rise,” she said.

At St. Catherine of Siena-St. Lucy, funding for the boards was provided in part by the the Trust grant and with assistance from the Big Shoulders Fund Patron at the school. “Without Big Shoulders, I’d have zero of this here,” Sister Marion said. “And this has made an enormous difference at our school.”



Leveraging Impact through Partnerships.

Among the most encouraging developments in the work of the Big Shoulders Fund is the growing number of groups stepping in to support Big Shoulders' mission. This academic year, Big Shoulders entered into a new partnership with an art education group and the Joffrey Ballet, while continuing a wide-scale vision and hearing screening program.

Art Resources in Teaching, or A.R.T., is a Chicago nonprofit that trains professional artists to visit schools to conduct six-week programs integrating art with other core curriculum areas, such as math and social studies. For instance, the artists might have young students mold clay into shapes to expose them to geometry fundamentals, or have older students examine a painting's dimensions and proportions. In another lesson, students studying social studies might design rugs to reflect ancient Persian or Indian art.

Big Shoulders began its partnership with A.R.T. this year at the urging of Alice Phillips Topping, a member of the A.R.T. board of directors and A.R.T.'s executive director, Walter Hansen, as both groups share a common mission – improving the lives of inner-city children. At a time when many schools are tightening their budgets and cutting art programs, A.R.T. offers support to truly enrich fine arts programming. In some cases, the schools that A.R.T. serves would have no visual arts program without A.R.T., Topping said.

Each of the artists visiting schools are highly talented and have been trained to work with schoolchildren, Topping said. "We provide top-rate programs," she said "... I truly believe this is a form of higher learning. For many children, art can turn on light bulbs in a number of subject areas."

In the 2009-10 school year, A.R.T. had artists-in-residence in the following schools: St. Agatha Catholic Academy, St. Bede the Venerable, St. Elizabeth, Epiphany, Holy Angels, St. Margaret of Scotland and Our Lady of Guadalupe. A.R.T., with funding from the Terra Foundation for American Art, also supported Big Shoulders teachers from St. Sabina elementary school to attend a 2009 summer program at the Art Institute of Chicago. The program provided teachers with new and creative ways to enhance curriculum and encourage cross-curricular connections.

"We really use dance as a tool to develop life skills."

Another new partnership this year is an Artist-in-Residency program conducted by the Joffrey Ballet through partial funding from the Illinois Arts Council. While the dance residency program has been offered to Chicago Public school students for some time, this is the first year it was available to Big Shoulders Fund schools. The program places dance instructors in two Big Shoulders elementary schools, St. Procopius and St. Dorothy. The professional dancers work with students twice a week after school to develop a variety of dance styles, including jazz, modern and basic ballet.

The program offers over 50 students multiple performance opportunities. Yet it is really about a lot more than dance, says Pierre Lockett, director of community engagement for the Joffrey Ballet Chicago. "We try to get them to focus on teamwork and self respect," Lockett said. "... We really use dance as a tool to develop life skills."

The Joffrey recently invited any interested students in the program to participate in an intensive ballet training program held on Saturdays at the Joffrey. This expands the opportunity for the students to discover more about their joy for dance outside of the school setting.

Through another partnership, more than 7,500 students in Big Shoulders Fund schools received free vision and hearing screenings this academic year. Some 350 students received free eye glasses or a free follow-up exam after failing the initial test.

The Look Hear Health Care program is generously funded by Blue Cross Blue Shield of Illinois and the Blowitz-Ridgeway Foundation. Students who fail the vision tests can attend a free Vision Clinic for follow up care, which is supported by the Give the Gift of Sight Foundation: A Luxottica Group Foundation and Chicago Communities in Schools.

Jennifer Tani, community relations coordinator for Blue Cross Blue Shield of Illinois, said Big Shoulders' work clearly fits a mission to identify underserved populations and provide much-needed help.

The vision and hearing program provided 32 schools with vision and hearing screenings from January through December. This year, many students were using old prescriptions or were wearing broken glasses; the goal of the program is to identify these students in the coming year to ensure they all have the tools necessary to learn.



How can you **transform** a child's life?

Karen and Giancarlo Turano

Maybe it seems a little counter-intuitive, but we believe that one of the most transformative forces in a young life is tradition – family, friends, neighbors, heritage, what we see and hear, etc. All too often inner-city life changes too rapidly and families, even communities, exist in such a state of flux that makes it challenging for a child to develop the strong inner core that will become a compass for life. The secret to the success of the Big Shoulders Fund has been to embrace and support the traditional methods and values of more than 100 years of Catholic education in Chicago. Big Shoulders brings to this time tested system, innovative ideas and funding that sustains and strengthens what we know has worked well over time. By blending the best of the new and the old, Big Shoulders schools transform the lives of thousands of individual children – changing the students' perception of themselves and the possibilities for their future.

Scholarships.

Querrey-Simpson Scholarship.

Michael Simelton was a ward of the state and had spent years in foster care when he met Kimberly Querrey. A business executive, Querrey offered advice to Simelton as he moved through his college years without many other role models.

Querrey never expected the relationship to have such a dramatic impact on Simelton's life. But Simelton now credits her with helping him carve out a successful career and a comfortable life on his own in Chicago. Simelton, 27, earned his master's degree in manufacturing systems from Southern Illinois University and now works as an analyst for Exelon in Chicago. He did this while living almost his entire life in foster care and paying for all of his graduate education on his own, with the help of scholarship support.

Her relationship with Simelton is often on Querrey's mind these days as she and her husband, Lou Simpson, launch a new scholarship program for the Big Shoulders Fund. A cornerstone of their scholarship is the mentoring component, something with which Querrey is quite familiar.

"I just kept pushing him ... and it was so rewarding to see Michael develop," Querrey said. "I saw that with a little effort, you really can change someone's life."

The Querrey-Simpson Scholarship began in the 2009-10 school year. In the first year, 25 scholarships were awarded to sixth graders at five Big Shoulders Fund elementary schools: Children of Peace, St. Bartholomew, St. Helen, St. Malachy and St. Procopius. The scholarship will follow the students throughout high school as long as they maintain solid grades and a good standing at their schools.

Next year, 25 more sixth graders will be awarded the scholarship, for a total of 50 scholars. Each student receives a \$2,000 award each year in elementary school and a \$3,000 award per-year for attending a Big Shoulders Fund high school.

Simpson, President and CEO for capital operations at GEICO, a national insurance company owned by Warren Buffett's Berkshire Hathaway firm, hopes the scholarship can make a significant impact over time. Regardless, he feels that Big Shoulders is well worth the effort.

"I'm not Catholic myself but I've just been very impressed with the Big Shoulders schools," Simpson said. "... My biggest goal is to just give young people an opportunity to succeed in life. That doesn't mean in every case that they will, but I would just like to see them have that opportunity."

Sallie DeAngeles, a longtime friend of Querrey and Simpson who, with her husband, sent their three daughters to Catholic schools in Chicago, is coordinating the scholarship program, helping to select the scholars and build the events and supports they need for long-term success. Most recently the students participated in a day-long Saturday enrichment activity that took the scholars and mentors on an imaginary journey to China to understand the multi-faceted aspects of the most populous country in the world through a variety of media.

DeAngeles said many of the scholars are from single-parent households or from families struggling to make ends meet. Many scholars could simply not afford a Catholic education without the scholarship.

Querrey and Simpson have assigned three mentors to each of the schools and are planning events for the mentors and mentees throughout the year. Among the key mentors is Michael Simelton, who says he hopes to follow his mentees for years, just as Querrey did for him.

"I just really believe in planting seeds," Simelton said. "That's what I want to do with this mentorship program. You can overcome whatever cards were handed to you with the right help."



Beeson Scholarship Program.

Gerald Beeson climbed to the top of Citadel Group, one of the world's largest investment firms, yet his modest roots as the son of a Chicago police officer are never far from his mind.

To give back to the southwest side neighborhood where he grew up, the 37-year-old Beeson and his wife Jennifer recently established a long-term scholarship program for the Big Shoulders Fund that's worth \$1 million over time.

"My dad was a cop for 35 years in the Chicago police department and one thing that I was always struck by was how much he sacrificed for us to go to a Catholic school," said Beeson. "My mom stayed home with the four of us and my dad scraped by to afford Catholic school. So now I'm just a very strong believer not only in the power of education, but the power of a Catholic education."

Before having her four children, Jennifer Beeson taught in Catholic schools in Chicago, the last of which was St. Symphorosa. She, too, believes in the ability of Catholic schools to shape lives and wants to help more students attend them, especially in a tight economy. "Having that ability to bring education and religion together, I just think it gives you a greater chance to have success," she said.

Students in the fifth through eighth grades are eligible for the scholarship. The scholarship will follow the students through elementary school and into a Catholic high school. Because Beeson graduated from Marist High School and has a long relationship with that school, extra scholarship dollars will be awarded to students who attend Marist. In all, 58 students will receive the scholarships over time, starting with \$1,200 per-year in elementary school and another \$3,500 per-year for high school, with an extra \$1,000 for students at Marist.

The Beesons are working with four southwest side elementary schools for the scholarships - St. Bede the Venerable, St. Walter, St. Gall (where Gerald Beeson went to school) and St. Symphorosa (where Jennifer Beeson taught first grade).

Richard Guerin, principal at St. Bede the Venerable, said the scholarships will have a huge impact at his school, where many parents have lost their jobs or seen their working hours drastically cut. "This is something that can really make a difference in a family's life," Guerin said.

The new program is the Beesons second dive into scholarship work for the benefit of Catholic schools. After Gerald's father, Gregory Beeson, died six years ago, the Beeson family set up an endowed scholarship for needy students at Marist. That program also involves mentoring the scholars, something the Beesons plan to continue with the new scholarship.

The Beesons have already approached some friends and colleagues about mentoring the new students, and they hope to host gatherings of the scholars as well.

"I just think having someone who can really be involved with these students makes it more impactful," Beeson said. "I was a kid who was blessed to have a number of great mentors in my lifetime and this is just a chance to pass that along."



Other Scholarship Programs.

Scholarship support to allow low-income students a chance to attend Catholic schools has always been a key focus of the Big Shoulders Fund. Each year, new efforts emerge from sponsors wanting to make whatever impact they can.

These newer scholarship programs add up in impact over time, while also allowing sponsors to closely mentor and get to know their scholars.

Among those efforts is a scholarship program set up by Marcia and Peter Masloski, a suburban couple, who wanted to provide new opportunities for students with great potential.

The scholarship launched in 2001 with three students, and over time, the couple has donated more than \$84,000 in scholarships. This year, 16 students received scholarships. The scholars have the option to renew their scholarship yearly and carry it through high school. Annually, elementary students receive at least \$1,000, while high school students receive \$1,500.

Marcia Masloski is a former social worker who felt that too many children get caught in the cycle of poverty and fall through the cracks. She and her husband, Peter, a financial consultant, wanted to develop relationships with students over time to provide a second layer of support beyond their families.

The Masloskis work with students at St. Mary of the Lake and St. Margaret Mary elementary schools and

Our Lady of Tepeyac high school. One student they started with in second grade is now a high school sophomore.

Marcia meets with the scholarship recipients at their schools at least once per year. She also introduces her own three children to the schools. Recently, her children, ages 5, 8 and 10, held a garage sale and donated the proceeds to Big Shoulders.

"We'll just keep adding scholarship kids as long as we can, financially," Marcia said. "I just love it. I can really see these kids thriving."

With similar intentions, longtime Big Shoulders supporters Christine and Glenn Kelly started a scholarship program in the 2009-10 school year. The Kellys had been co-patrons with another couple at Maternity BVM elementary school in Humboldt Park for five years. They also wanted to do something more intimate than sponsoring an entire school.

"This is an opportunity to get to know individual students and do some mentoring," Glenn Kelly said. "... This was really driven by our desire to become more connected with the students we are helping."

The Kellys are starting with \$1,500 renewable scholarships for four sixth graders and expect to add additional students next year. They plan to follow the students through their eighth grade graduation.

The initial scholars are from four schools: Maternity BVM, St. Angela, St. Margaret Mary and St. Sylvester. The Kellys hope to get to know the students through several gatherings each year, including visits to their schools. This year, they planned a trip to the Field Museum for the scholars, as well.

For the past three years, the Illinois Club for Catholic Women (ICCW) has also supported a scholarship program through the Big Shoulders Fund, awarding 10 scholarships to young Hispanic women at all-girls Catholic high schools. Each girl receives a \$1,000 scholarship every year in high school as long as she meets the scholarship requirements.

The scholarships are based on need and have been awarded to students at Our Lady of Tepeyac, Josephinum and Notre Dame High School for Girls. "We just found that Hispanic high school girls were one of the largest underserved populations in the city," said Margie Flynn, a long-standing member of the ICCW who helped introduce the scholarship program. "Just because you do not have the money doesn't mean you shouldn't have an opportunity to attend these schools."

She said the schools provide the ideal environment for the girls. "They have a very safe choice," she said. "These are schools with very loving, compassionate teachers and staff."







How can you **transform** a school?

Pamela Scholl / Dr. Scholl Foundation

Transformation is a hands-on proposition. It truly does take many people getting their hands dirty. And while the Big Shoulders schools reside in and serve communities that face the challenges of poverty and at times hopelessness, the schools make sure that students achieve beyond any realistic expectations. This achievement requires the commitment, ideas, passion and leadership of many people – teachers, principals, Patrons, supporters and parents. Maybe I am just too pragmatic, but it comes down to work. Put a plan together. Gather the resources to implement the plan. And then, get the right team together to get the job done. This is indeed about people from many different walks of life coming together. Our Big Shoulders experience reminds us that we can't transform the life of a school or its community by ourselves, but together we can make a difference.

Patrons.

William Krieger at St. Ethelreda School

The St. Ethelreda School computer lab is a long way from the boardrooms that Bill Krieger once sat in while building his own computer software firm. Yet in some ways, the work is just as challenging, if not more so.

"It's all about problem solving, guys," he says to the student journalists one fall afternoon as they struggle through their assignments. "If you run into a problem, it's not a stop sign. You've got to figure out a way around it."

The statement is exactly what Krieger lives out every day in his work at St. Ethelreda School, a vibrant inner-city Catholic school where he now serves as a Patron.

The Big Shoulders Fund's Patrons Program, founded in 2000, partners committed individuals like Krieger, corporations and corporate leaders with individual schools with the belief that the support and experiences of a Patron will make a struggling school more viable for the long-run.

In a typical Patron relationship, the sponsor invests \$100,000 annually to a school for three years. The grants are considered seed money to help the school better serve its students and draw more students for years to come.

After leaving Synopsys, a design automation software company firm that he co-founded, Krieger decided to become a Patron because he believed strongly that Big Shoulders Fund schools are a great alternative to many beleaguered Chicago Public Schools.

Krieger is in his third year at St. Ethelreda School in Chicago's Auburn Gresham community. In addition to his financial commitment, he has devoted hundreds of hours of his own time at the school, training students and staff in computer technology, launching a modern school website, and initiating school improvement and marketing plans.

To build entrepreneurial skills among the students, Krieger launched a student newspaper this year. The newspaper is his latest effort to nurture a school culture of creativity, growth and innovative use of technology. In their editorial sessions, the students are eager, but need a lot of guidance. One explains why he missed a deadline. Another struggles to find Internet art to illustrate a story.

In his jeans and a button-down shirt, Krieger is highly approachable, constantly disarming the students with jokes. At the same time, he gently keeps pushing his young writers, as he does the school's energetic principal, Denise Spells.

"He's in this to win," said Spells. "He's just a very hands-on person, and he has really taken all of our teachers to the next level in technology. He continually pushes me to do more to make St. Ethelreda succeed."

That philosophy has brought a lot of change to St. Ethelreda School. When Krieger arrived in 2008, the school didn't even have a printer and many teachers did not use email accounts. With his support, the school set up its first computer lab along with an innovative school website where teachers post articles and communicate via email to parents. He also researched and helped implement an online learning program called Study Island that supplements and enhances the regular curriculum. Early results are positive both in terms of student achievement and increased enthusiasm for learning.

Krieger's support has also helped to build and sustain enrollment by bringing in a part-time marketing director to recruit families, and is launching the school's first alumni reunion. With his leadership and financial support, a new scholarship program has been initiated to draw new families to the school, giving parents who refer a new family to the school a break on their own tuition.

St. Ethelreda's enrollment is at roughly 200 students this year, and the school continues to work diligently to maintain student enrollment in a tough economic environment. Yet Krieger and Spells believe that with their energy and dedication to the school, St. Ethelreda will thrive for years to come.



"It's all about problem solving, guys. If you run into a problem, it's not a stop sign, you've got to figure out a way around it."

Dr. Scholl Foundation at Visitation

In a community struggling with poverty and unemployment, Visitation Catholic School on Chicago's south side faces countless challenges. Yet with the support of a Patron board and a dedicated administration, there's a sense of pride, excitement and hope for the families Visitation serves.

Dr. Karl Kirby, a physician from the Washington Park area on the south side, looked at many public and private schools for her two daughters. She said nothing felt right until she walked into Visitation in Chicago's Englewood community. Kirby was struck by the dedication of Visitation's leadership and the warm and inviting feeling she felt from the start.

"We had run the gamut looking at schools but when I saw Visitation, it was the first time it all felt right," Kirby said. "I walked through the door and it was home, and it has continued to be a home away from home for my children."

Dr. Kirby is now on the school board at Visitation, working alongside the school's Patrons, the Dr. Scholl Foundation, where Pam Scholl serves as board president. Scholl has worked closely with Dr. Kirby as the physician planned for an expansive new playground to serve preschoolers through 8th graders. Ms. Scholl also recruited colleagues for the board from Chicago's business community, who bring new perspectives on how to strengthen the school and build enrollment, now at 175 students.

The Dr. Scholl Foundation is in its fourth year as the Patron at Visitation, committing \$100,000 each year to facility enhancements such as the new playground, scholarship assistance, teacher aides for children with learning disabilities, and a variety of new

programs. Also through the Dr. Scholl Foundation's generosity, the school's roof was repaired and renovations were made to the auditorium, making the building much more inviting, attractive and visible, said Sister Jean Matijosaitis, O.P., principal of Visitation.

Sister Jean's religious community, the Sinsinawa Dominicans, have run Visitation Catholic School since 1891, dedicating themselves to providing a high-quality Catholic education in an area of great need. Ninety percent of Visitation's current student population lives in poverty.

While the sisters have remained committed to their work, the new energy and resources brought in by the Dr. Scholl Foundation have been critically important. The building renovations alone have boosted morale and given a nearly 100-year-old school building a much-needed facelift.

Despite a difficult economy, Pam Scholl is optimistic about Visitation's future. "When you walk in the building and you see children really learning, and they feel safe and loved," she said. "... I know that Vis will succeed for years to come."



The John and Kathleen Schreiber Foundation at St. John Berchmans

With the help of the John and Kathleen Schreiber Foundation, a committed pastor and an energetic principal, St. John Berchmans School is in the midst of a renaissance.

The first step on the path to the revival of the Logan Square school came in 2006, when the John and Kathleen Schreiber Foundation, based in Lake Forest, IL, agreed to become a Big Shoulders Fund Patron. At the time, the school was on the verge of closing, with enrollment sliding to 150 students.

"I have to say, I was pretty nervous about the school when I first came in," said Rev. Wayne Watts, who became pastor at St. John Berchmans in the middle of the school crisis in 2005.

As Patrons, the Schreiber Foundation committed to provide \$100,000 annually for three years. In addition to the funds, the Foundation contributed the business expertise of John Schreiber, a commercial real estate investor, and several of his children, who manage the school board and help organize large fundraising events for the school.

The Patrons' marketing expertise, with an array of building and structural improvements, dramatically enhanced the overall beauty and functionality of the school. Some of the key improvements included a state-of-the-art community playground, new wood floors, a science lab, cutting-edge classroom technology, counseling services and a host of new after school programs. After

three years of making such generous contributions of financial resources and talent to the school, the Foundation recently agreed to extend their help for another year.

"Honestly, we would not have been able to do anything if it weren't for the Schreiber Foundation," Father Watts said. "The school is just beautiful now, both in terms of the physical plant and more importantly because of all the extra students, and that's clearly because of the help of our Patrons."

The Schreiber Foundation's commitment also coincided with a new period of change in school leadership. With the Patrons' active engagement in the search process, Peggy Roketenetz became the school's principal. Roketenetz was a high school teacher in the Chicago Public Schools and a parishioner at St. John Berchmans. Impressed by her energy and ideas, the board and Father Watts, decided that she was perfect to lead St. John Berchmans into a new era.

Heather Sannes, John Schreiber's daughter and the president of the St. John Berchmans school board, said that hiring Roketenetz was a great decision. "Having her come on board was the best thing that could have ever happened," Sannes said. School enrollment is now at about 225 students. Most importantly, there's a new energy at St. John Berchmans.

"The sense of community is amazing," Father Watts said. "Now, we're a family here."



William Devers, and others, at St. Sylvester School

At St. Sylvester School in Logan Square, a longtime Big Shoulders Fund Patron working with a dynamic new principal has ushered in an exciting era.

Just a few years ago, St. Sylvester School's enrollment suffered serious declines, reaching a low of about 150 students. Today the school is on a dramatic upswing, with enrollment approaching 230 students who enjoy a vast array of curricular enhancements and afterschool programs.

The Patron, William J. Devers, Jr., is a long-time member of the Big Shoulders Fund's executive committee and was one of the initial leaders behind the Patrons Program. Devers is the retired president of Devers Group, Inc., and was a co-founder of Trans Union Credit Information Company in the 1960s.

Devers, with the support of business colleagues and friends, has been a Patron at St. Sylvester School for nearly 10 years, contributing more than \$220,000 over the years to invest in various school improvements. He has also recruited the support of other Patrons, bringing the total contribution at St. Sylvester to more than \$400,000.

The Patrons' support has helped with structural and building enhancements, as well as a new computer lab. Still, Devers says one of the most significant improvements came when a new principal, Dan Bennett, took over the school's leadership in 2007. Bennett, working with St. Sylvester's new pastor, Rev. Paul Stein, has brought a jolt of energy and excitement to the school, Devers said.

"He has just done marvelous things for the school," Devers said of Bennett. "He has vastly improved the curriculum ... ushered in a phenomenal increase in enrollment and built a great relationship with parents. He's just a very good communicator."

Dan Bennett, now 30, was not originally considered a candidate for the principal's job at St. Sylvester School. A graduate of the University of Notre Dame, he taught third grade at St. Sylvester but had no administrative experience. Yet leaders at the parish and school felt that he had the enthusiasm, creativity and intelligence to take on the principal's role, so they mentored and recommended him for the job.

In his years as a teacher at St. Sylvester School, Bennett said there were constant warnings that the school might close because of declining enrollment.

"At all faculty meetings in years past, closing was always part of the discussion. Things were really tough," Bennett said. "As a result, the fear of that happening makes enrollment my number one priority as principal."

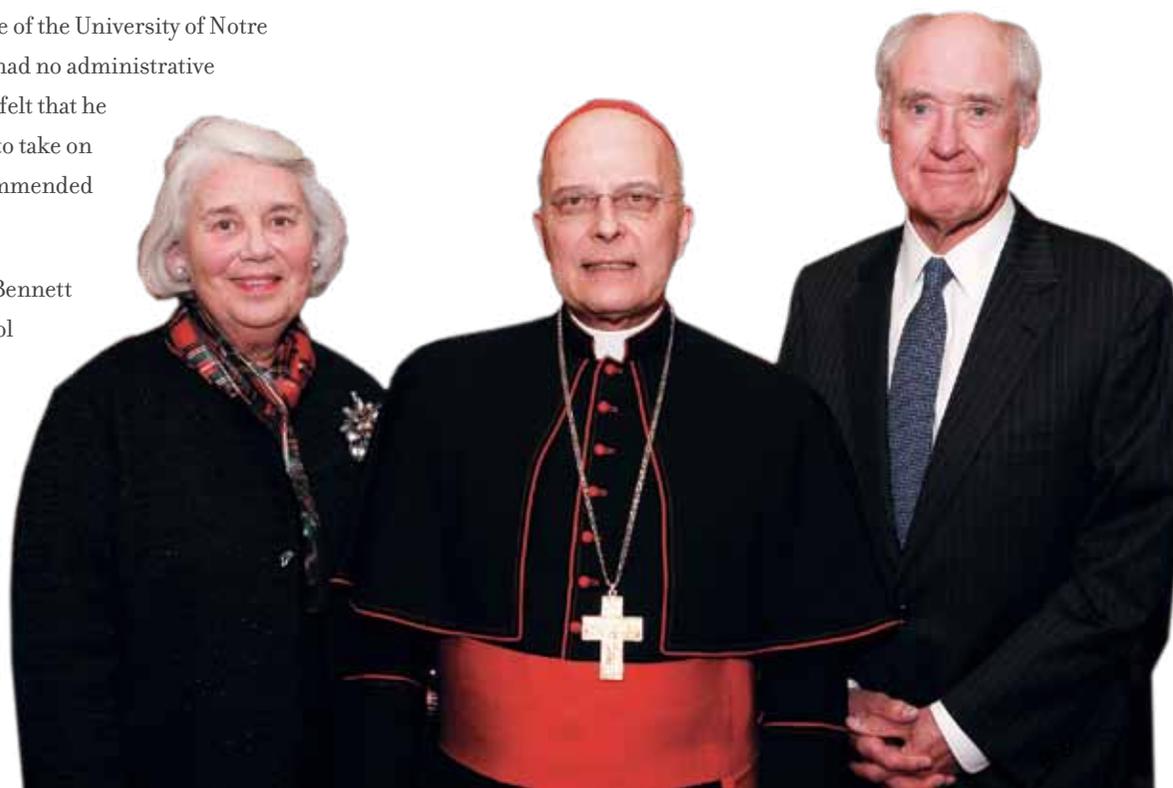
Bennett has been excited to see enrollment increases for the past three years now, but he says the hard work continues as many families struggle to afford tuition, now at roughly \$3,900 for one student. With nearly 80 percent of the predominantly Hispanic student body living in poverty, the school continues an aggressive tuition-assistance program, with about 75 percent of the students receiving some financial aid.

The curricular and after school programs have been completely revamped to attract a wider audience and to better serve students. Bennett started six new sports teams at St. Sylvester, up from just two. There are also a wide range of after school clubs, including tutoring, math club, art club, foreign language clubs, and a "Go Green" club. Teachers running the after school clubs earn a small stipend for their efforts.

Bennett has also embraced his school board and the Patrons, welcoming advice from the business world as he looks to improve the marketing program and overall offerings at the school. Joining Devers as school Patrons over the years have been Gary Coughlin, George Houlihan, James Leider, Harold Livvendahl and Timothy Whiting.

The Catholic school model gives Bennett more flexibility to make quicker changes to the academic program without the administrative rules that can tie down many public schools. For example, Bennett adjusted the reading program for middle school students, placing students in a reading group based not just on their age, but on ability level.

The Patrons' board has supported Bennett's efforts while also pushing him to keep striving for further improvements. "Our relationship has definitely made all the difference in the school, for today and tomorrow" Bennett said.



Croghan Teacher's Award.

Faculty and staff at St. Helen School have worked tirelessly to transform their school from the brink of closure to a solid and thriving part of the neighborhood.

Their aggressive efforts were never more evident than last year, when the West Town school posted one of the biggest gains in standardized test scores of any Big Shoulders Fund school. The biggest improvement was seen in the 20 point gain by seventh graders in math.

In recognition of that achievement, St. Helen school received the Croghan Teacher's Award for the 2008-2009 school year. Rosemary and John Croghan endowed a fund for this annual award to recognize the profound effect that a high-quality teaching staff can have on student success. The cash award recognizes the impact of faculty and staff at one Big Shoulders Fund school each year, and schools are selected based on a number of factors related to the quality of education provided to their students. Performance on the Terra Nova standardized test, specifically the improvement in a school's anticipated and obtained scores, is a key factor in choosing the winning school.

As part of the award, each teacher at St. Helen's received a cash bonus for their personal use, roughly the equivalent of one month's salary. A portion of the award was also used to fund scholarships at the school. Teachers were thrilled by the recognition, said Marianne Johnson, the school's principal.

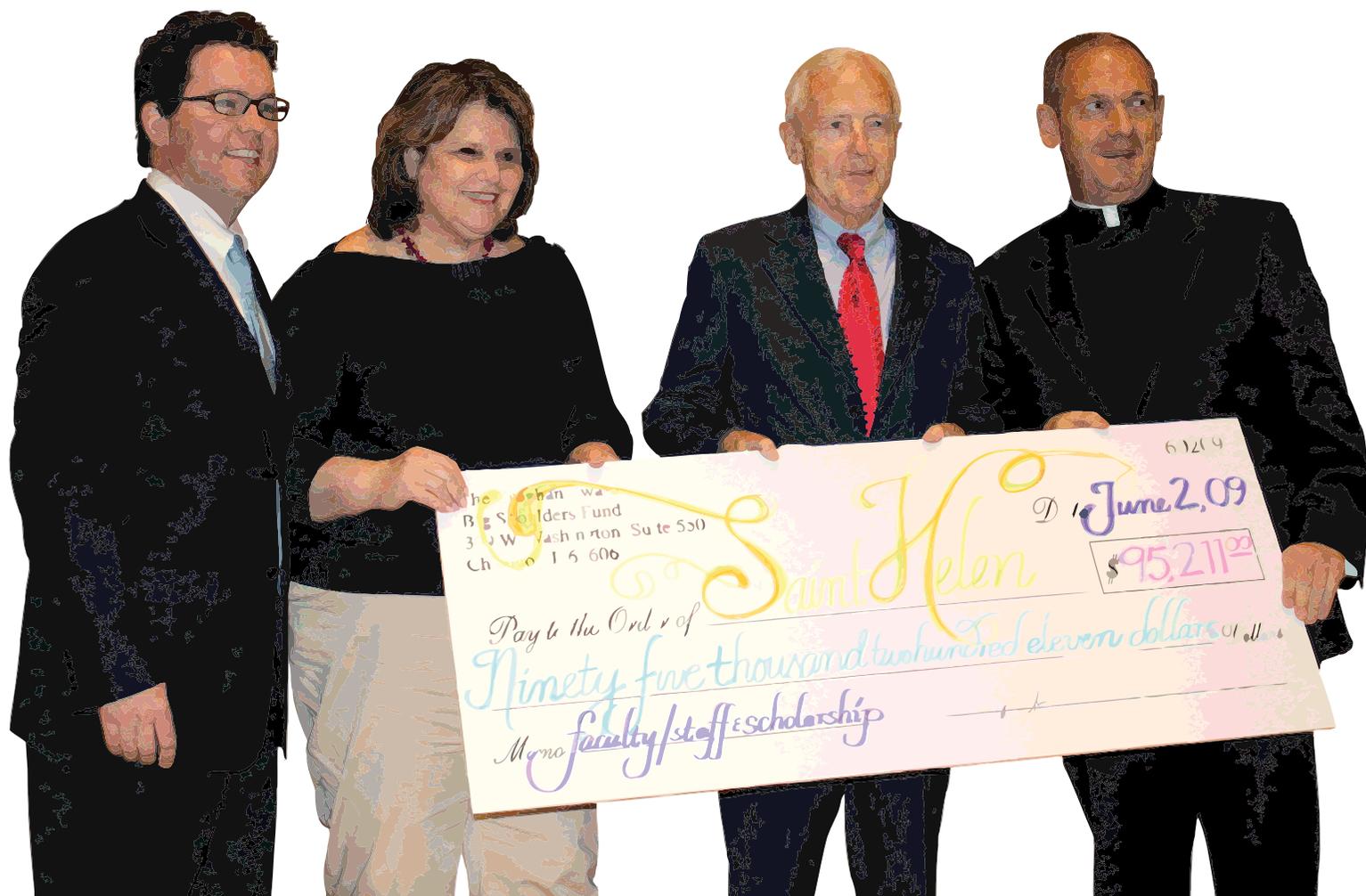
Much of the success at St. Helen can be traced to Johnson's leadership. When she came to St. Helen in 2003, the school enrollment was just at 198 students. Since then, enrollment has grown by at least 10 percent each year and is now at 345 students.

The school is racially and economically diverse, with roughly 50 percent of students living in poverty. St. Helen serves three distinct communities – Ukrainian Village, Humboldt Park and Wicker Park – and draws families from as far away as Indiana. Because of its proximity to downtown Chicago and its extensive afterschool program, the school attracts many commuting parents who work in the Loop.

Johnson praises her staff's dedication to professional development. Seventy-five percent of her staff have earned Master's degrees or are pursuing them at night.

One of the keys behind the jump in student achievement has been the staff's commitment to more individualized instruction and additional teacher aides, Johnson said. In some core subject areas in the junior high, students are also grouped by ability, not grade, allowing many more students to reach their potential, she said. The after school program, which runs to 6 p.m., also provides students with a safe place for enrichment and academic support.

For Johnson and her staff, the Croghan Teacher's Award was further affirmation that all the hard work is paying off, helping to secure St. Helen's place as a vibrant and exciting school. She says assistance from the Big Shoulders Fund has helped her bring countless new opportunities to St. Helen's. "I can't stop marveling at the fact that whenever I ask for support, it's there," she said.



Channeling New Leadership for Inner-city Catholic Schools.

AnnMarie Mahay wasn't sure what career she wanted to pursue after her college graduation, but knew she wanted to give back to a Catholic school system that had influenced her so much as a child.

Motivated by her faith and a missionary spirit, she joined LU Choice, a Loyola University of Chicago program, that paid for her Master's degree while she taught in a high-need Catholic elementary school. Her passion for teaching shone through almost immediately as a science teacher at Our Lady of Tepeyac elementary school in Chicago's Little Village neighborhood, and she was identified as a great candidate to become a principal.

Aggressive efforts to move her into a leadership role have since helped bring Mahay, at just 28, to the principalship of St. Hyacinth Basilica School in the Avondale/Logan Square neighborhood on the northwest side. Mahay's ascent to the top of an inner-city Catholic school is the kind of trajectory that the Big Shoulders Fund hopes to see a lot more of in coming years, especially as scores of principals in the current system retire over the next decade.

Responding to the demand for new leaders, Big Shoulders launched a principal recruitment and development program in 2007 with the support of an anonymous donor. Candidates for the program choose from five partner universities and typically pay just a third of the tuition toward a Master's degree in Educational Administration. The university and Big Shoulders split the remaining costs.

In return, graduates commit to serving as principals in a Big Shoulders Fund school for a number of years. Currently, Big Shoulders has agreements in place with DePaul University, Dominican University, Loyola University of Chicago, University of Notre Dame and Saint Xavier University.



Mahay, who attended Dominican University, is the program's first graduate, and 10 other candidates are now enrolled. While she's excited about her new position, Mahay faces major challenges at St. Hyacinth Basilica School, which has seen declining enrollment in recent years.

St. Hyacinth serves a predominantly Hispanic student body. About 80 percent of the students are from low-income families. Mahay's goal is to boost enrollment to closer to 150 students by next year, and she's working aggressively to revitalize the educational services and after school programs at St. Hyacinth.

While co-workers and mentors of Mahay say she brings tremendous energy to the job, she says her work is cut out for her. "I'm not just here to discipline the kids," she said. "I'm here to make it the best school I possibly can for the students. Facing a challenge like that is just huge, but I feel up to the challenge."

Yet even after just a few months on the job, Mahay has already impressed her mentor, Marianne Johnson, the principal at St. Helen school. Johnson was one of Mahay's instructors at Dominican and has offered to be a sounding board as Mahay works through the challenges of her first year. "I'm just very impressed by her professional presence as she administers to families at risk," Johnson said. "... And I'm impressed with her inspiration to take the job in the first place. Clearly, there's a critical need for programs like this."

Energetic and passionate young leaders, who also bring experience and new skills, are necessary to revitalize inner-city Catholic schools across the city, just as Mahay is doing at St. Hyacinth Basilica School.



How can you **transform** a city?

Joanne and Art Velasquez

Like it or not, transformation happens to you. The city changes. Its population shifts demographically, racially, economically and occupationally. The culture changes. The geography changes. The challenge is finding opportunities within that change. In our lives, we have lived by the same mantra. You have to get involved. Make change work for people. Chicago is often called the *City of Broad Shoulders* because generations of families like ours and the many thousands represented in the Big Shoulders Fund schools are working hard to provide a better opportunity to their children through education. These families need a partner to make this opportunity a reality. Big Shoulders brings those with the expertise, passion and resources to be a channel for positive change. This is all to enhance an irreplaceable asset – the 93 inner-city Catholic schools – that have transformed the beliefs and outcomes for communities and families across the city for many years.



The right preparations
"Antonio graduates the
private high school. He
to what he learned in

Put Your Child In The Right Place. A Chicago Catholic School.
Visit www.ChicagoCatholicSchools.org or call

Project Enrollment.

For years, Catholic schools didn't bother selling themselves. The idea of a Catholic education was just a given for many families. Yet with economic pressures now making Catholic schools seemingly out of reach, more schools are sold on promoting their virtues to a wider audience.

To support those efforts, the Big Shoulders Fund is helping its schools provide more tuition scholarships to new families as an incentive to enroll. "History proves that once students get inside, Catholic schools clearly stand out," said Joshua Hale, executive director for Big Shoulders.

The work is definitely paying off. After launching a marketing and tuition incentive program dubbed Project Enrollment three years ago, Big Shoulders has seen significant enrollment improvements, despite a difficult economy and competition from emerging charter schools.

This academic year, the Big Shoulders Fund helped 2,283 new students enroll in Catholic schools through financial aid. The previous year, the scholarships helped bring in an 886 students.

In the 2009-10 school year, \$680,000 was made available to Big Shoulders Fund schools for tuition assistance during the student recruiting period. This allowed schools to offer \$600 scholarships to new students, with the funding shared equally by Big Shoulders and the local schools.

In addition to the incentive funding, many schools have created new positions for marketing and development directors. These leaders reach out to the community with advertising, open houses, special events, alumni outreach and a host of other strategies designed at promoting their schools at the local level.

Schools with the marketing directors - many of them funded by Patrons - are seeing big gains from their efforts. Among the biggest successes has been St. Angela's School in Austin.

Five years ago, St. Angela's experienced a worrisome enrollment decline to fewer than 200 students. The school board then hired a marketing and development director who focused on marketing the school and promoting program changes that would attract more students. Today, enrollment is hovering near 280 students and is projected to top 300 students next year.

In a school where nearly all the students live in poverty, the enrollment push seemed daunting at first. However, ads in local newspapers, open houses and a campaign to educate potential students about the financial aid available, made a real impact, said GERALYN LAWLER, the school's director of development. She says the school's decision to



is year from a great
e always says he owes it
Catholic grade school."

Catholic School.
312-544-8687 for more information.

**Big
Shoulders
Fund.**

promote its after school and summer programs also brought more excitement and interest to the school. The after school program was sparsely attended in the past, but now 80 percent of the student body takes part. "We've always had a great product here," Lawler said. "It was just a matter of getting the word out there."

Primarily through the Patrons Program, the Big Shoulders Fund helps support marketing and development positions at 32 schools.

A system-wide advertising campaign also supports the ongoing efforts. The campaign, dubbed The Right Place, places ads promoting Big Shoulders schools on CTA trains and buses. Mark Masseur, partner and creative director of Symmetri Marketing Group in Chicago, donated his services in creating the ads. A Catholic school parent and Big Shoulders Fund director, Masseur wanted to highlight the many virtues of a Catholic education.

One ad, entitled The Right Preparations points out that "96 percent of students that attend Catholic high schools supported by Big Shoulders Fund graduate and 87 percent go on to college." Each ad concludes with: Put Your Child In The Right Place. A Chicago Catholic School. The ad campaign alone produced thousands of inquiries from interested parents over the last two years.

Hale emphasizes that the marketing work takes the Catholic school system into a new era, when telling a school's story is all the more essential.

"Once people are in the door, they get it," Hale said. "But getting people to walk in the door and also know that the school can be affordable can be a challenge. We just have to break down all the misconceptions, and that's where marketing really helps."

Scores of Latino parents were greeted last summer by a telephone call from a very passionate and persuasive young woman, Imelda Caballero.

Caballero simply told her story.

Growing up in Little Village, she graduated from a Catholic elementary school because of the scholarship assistance offered to her by Big Shoulders after her mother became sick with a brain tumor. While her mother recovered, the financial help carried Caballero through high school at Queen of Peace, when mounting hospital bills put her and her mother, a single parent, in a desperate financial situation.

During her calls to parents and parishioners at schools like St. Agnes, also in Little Village, Caballero made the point to parents that the nurturing environment of her own Catholic school, plus the mentors she had through her scholarship, pulled her through a tough time and made her stronger.

Caballero, now 22 working full-time and attending Northeastern Illinois University, emphasized that the same could happen for any hard-working child interested in a Catholic school. She said scholarship assistance was available to families who struggled or were out of work.

Caballero's eight weeks spent making calls was all part of an internship program set up by the Big Shoulders Fund to help with its marketing effort, Project Enrollment. Caballero made calls to parents at St. Agnes elementary school and also attended community events, much like a campaign worker getting the word out about Catholic education.

She donated her time because she felt passionate about giving back to the Catholic school system that has meant so much to her. She said her teachers and the mentors she had through the scholarship were like an extended family.

"I got to where I am because of them," Caballero said, "because there were others willing to helping me."

BSF Auxiliary Board.



“THE AUXILIARY BOARD’S EMPHASIS ON VOLUNTEERING AND DIRECT SERVICE HAS BEEN THE MOST IMPORTANT FACTOR IN ATTRACTING HUNDREDS OF YOUNG PROFESSIONALS TO OUR CAUSE.”

With more than 160 members, the Big Shoulders Fund Auxiliary Board has grown dramatically in the three years since its inception, becoming a significant source of scholarship support and service to inner-city Catholic schools.

The Auxiliary Board launched in February 2007 and ended its first year with 58 members, most of them young professionals in their 20s and 30s. By 2009, the board had more than tripled and increased their fundraising by more than 500 percent. The group has raised more than \$85,000 for scholarships for 71 students, an increase of nearly 40 students from the previous year.

Louis Crisostomo, a 29-year-old assistant state’s attorney for the Cook County State’s Attorney’s Office, has served as the auxiliary board president since the board’s inception. Crisostomo said members are drawn to not only donating money, but also their time by getting directly involved with Big Shoulders Fund students and their schools. Many members serve in the schools on a regular basis as school board members, tutors, mentors, coaches and guest teachers.

“The Auxiliary Board’s emphasis on volunteering and direct service has been the most important factor in attracting hundreds of young professionals to our cause,” Crisostomo said.

Mark Kirchner, the vice president of the auxiliary board, said the work has been inspiring for many of the young leaders involved. “For me, its very eye opening to see the need,” said Kirchner, 26. “A lot of these kids’ parents are really struggling in this economy and every dollar we can help raise in turn has a ripple effect for the entire family.”

Kirchner got involved with Big Shoulders Fund after he took a position with Arthur J. Gallagher Company after college and became a mentor for the Gallagher Scholars program, which provides scholarship support to hundreds of children in Big Shoulders Fund schools each year. Kirchner, now an assistant director of business development at Prudential in Chicago, still mentors seventh grade students at St. Bartholomew’s, a Big Shoulders Fund elementary school.

Each auxiliary board member contributes a minimum \$50 per year toward scholarships, and most participate in other fundraising efforts and service work.

The Auxiliary Board also sponsors six Give Back Days each year, during which members, partner organizations, corporations and religious groups visit Big Shoulders Fund schools on a weekend and participate in a morning of service work, such as painting, landscaping, cleaning, filing and more.

Kirchner said the Give Back Days are a great opportunity for people to get introduced to the mission of Big Shoulders, see our schools, meet the principals and witness up-close the work of the Big Shoulders Fund while enjoying the camaraderie of other supporters of Big Shoulders. The day is not only an introduction, but a means for people to come together and stay connected to our schools and students. “Some of these classrooms have not been painted in 20 or 30 years,” Kirchner said.

The Auxiliary Board also hosts various fundraising events, such as the Bowl for Big Shoulders, which raised nearly \$14,000 in 2009, more than doubling the funds raised in the second year of the event, and the Big Shoulders Fund Ball, which brought in more than \$55,000, an increase of more than 350 percent over the previous year.

“We had a goal to raise \$35,000, but by word of mouth and outreach, we reached way beyond our goal,” Kirchner said. The Auxiliary Board continues to stretch and expand its reach as a meaningful way for young professionals to get involved in the vision and mission of Big Shoulders with high hopes for continued growth and development.

Chairmen's Advisory Council connects Corporations and Professionals with Big Shoulders schools.

Founded in 2007, the Chairmen's Advisory Council seeks to engage professionals in the mission and work of Big Shoulders Fund. Led by Fred O'Connor, an executive with Morningstar, the group has grown to over 40 members who remain focused on engaging current leadership in meaningful ways, expanding the reach of Big Shoulders to new organizations and networks and building the base of support for Big Shoulders mission.

A prime example of this innovative work can be seen in the development of the Big Shoulders Fund Stock Market Program. There's no better way to teach children about investing and the stock market than to give them a shot at earning some real money on their own.

The original outline of the program was launched nearly a decade ago by Big Shoulders Fund Director Charlie Bobrinskoy, vice chairman of Ariel Investments. In the 2009-10 school year, the Chairmen's Advisory Council expanded their program to 11 schools, up from three the previous year, and they hope to reach even more schools next year.

The project puts volunteer business leaders into classrooms to teach the basic principles of saving, investing and the nation's stock market to inner-city children. Joining Bobrinskoy, Jim Hoeg, a former vice president with Goldman Sachs and now a portfolio manager for Citadel Investment Group, created the curriculum with other Chairmen's Advisory Council members John Podjasek and Don Draudt, who also taught the program last year.

Each school in the project receives \$3,000 to invest. The funding comes from donations to Big Shoulders in support of the program.

The children, all eighth graders, use the money to create a hypothetical stock portfolio and pick their own stocks, based on actual research of companies. Once a month, the volunteer business leaders teach new aspects of investing and savings, then give the students the option to change their portfolio based on that information.

The students' stock picks affect how much money the school can generate each year. For example, if their overall portfolio appreciates an average of 10 percent, the school gets \$3,300 at year end. If the stock portfolio declines 10 percent, the school only gets \$2,700.



In most cases, the 20 to 30 students in each class receive 1 percent "management fee" for their portfolio, which typically amounts to about \$30 for each student at the end of the year. Any remaining profit goes directly to the school.

"The whole idea of this program is to introduce kids in these schools to a world they might otherwise never be introduced to," Hoeg said. "... And at my school, the students ended up finishing up slightly over 20 percent in profits. It was really fun to see them do so well."

The Stock Market Program is an outgrowth of an effort to tap fresh business leader support for creative and hands-on initiatives to benefit Big Shoulders Fund schools.

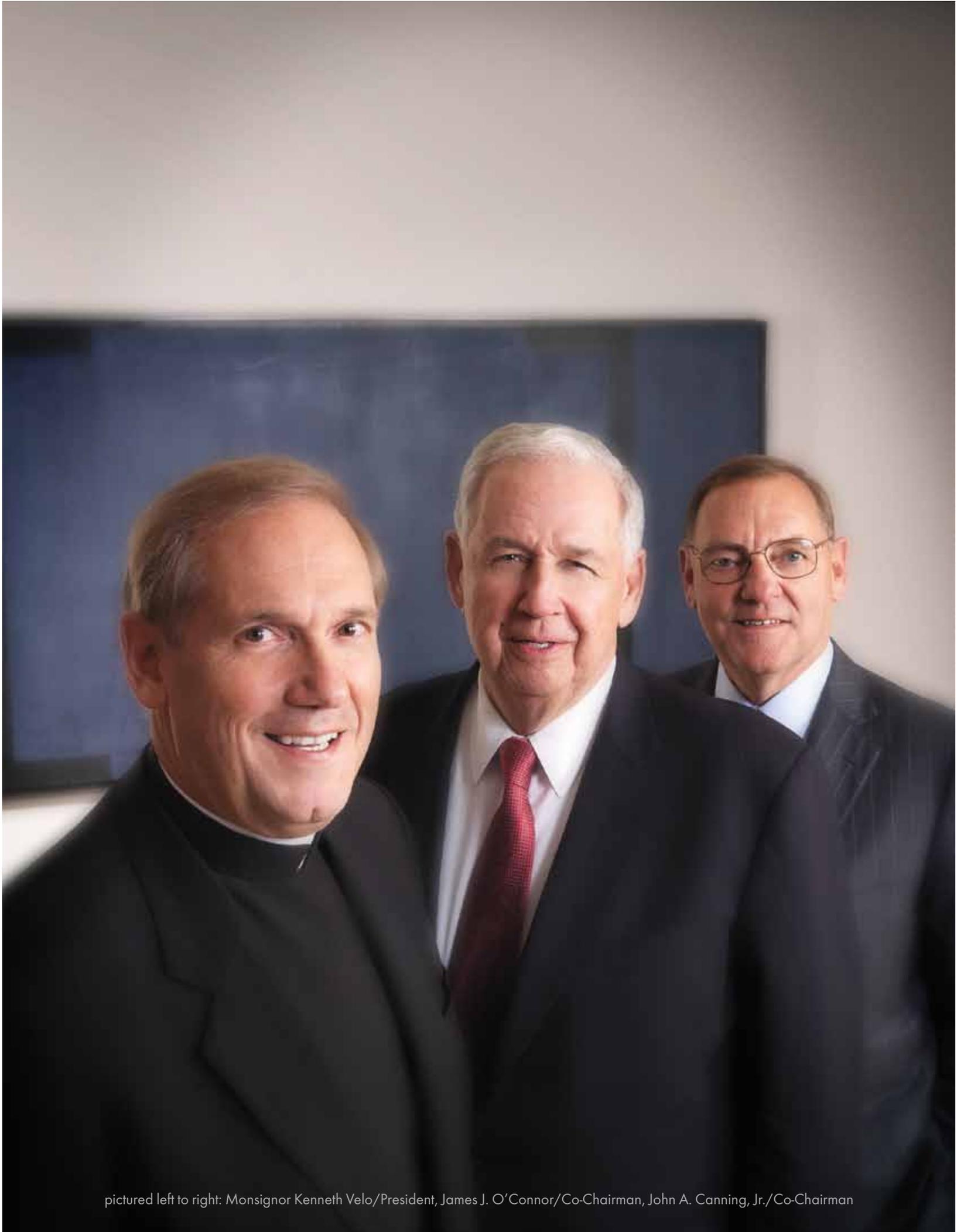
The Chairmen's Advisory Council aims to recruit business executives who may not have the financial means to become Patrons at a school, but can contribute on some level and volunteer their expertise and talent to the schools.

For many years, Big Shoulders' leadership has been made up mainly of the same core people who helped found the organization. As some of that group ages and retire, there's a need to expand the base of support for the work we do, O'Connor said.

"We need to engage more people and involve them in new and different ways," O'Connor said. "The Stock Market Program one great template of getting business leaders into the classroom to interact with the students we serve."

Hoeg is exactly the kind of leader Big Shoulders wants. At just 37, he spent much of his career working on Wall Street at Goldman Sachs. When he moved to Chicago, he was looking for ways to get more involved in charitable work. He liked that this work allowed him to not just write a check but get personally involved in motivating young children. Last year, he was invited to speak at the eighth grade graduation where he volunteers, St. Pius school.

"I went to Catholic schools my whole life and it was a very enriching experience. It made such a huge difference for me ... and I see that the Catholic schools these kids attend can be critically important in their lives too," Hoeg said. "I just found that the mission of Big Shoulders is something that I'm proud to be affiliated with."



pictured left to right: Monsignor Kenneth Velo/President, James J. O'Connor/Co-Chairman, John A. Canning, Jr./Co-Chairman

Leadership Message.

The inner-city Catholic schools supported by Big Shoulders Fund have stood as educational cornerstones for well over 100 years. Today, many of these same schools consistently prove that rigorous, values-based learning in a safe environment is the most effective way to prepare children for the future.

By definition, Big Shoulders Fund schools reside in the neediest areas of Chicago. They provide strongholds for not only struggling families, but communities as a whole. Investing in the lives of these students and schools ensures their future success as students, as professionals, as citizens and as parents. Recognizing the need for achievement is the first step towards reaching it. So many families are pulling together to provide a chance at success for their children, and with the help of our schools and the Big Shoulders Fund community, we are able to give them that opportunity.

Supporting the Big Shoulders Fund is more than monetary. Hundreds of advocates gather for Give Back Days at Big Shoulders schools, investing their time and energy to paint bathrooms, keep classrooms clean or work on landscaping. At 63 Big Shoulders Fund schools, Patrons work with school leadership to initiate strategies that will keep schools financially and academically stable for generations to come. Between professional development, curriculum enhancements and launching new, enriching programs, we invest each year to ensure that students will receive the highest quality of education possible.

We are fortunate that the 25,000 children at Big Shoulders Fund schools strive to reach their greatest personal potential, overcoming any economic or personal hardships their families might face. With an unmatched eagerness to succeed, 96 percent of Big Shoulders students graduate from high school, and 87 percent of those students enter college. Because of this clear commitment to their children's education, Big Shoulders was proud to provide over \$5 million in scholarships to 5,000 deserving students just this past school year. This is nearly double just four years ago. The need is great, but the commitment of parents, supporters and schools continues to rise to meet these new challenges.

For 24 years we have partnered with so many generous people, foundations and corporations who champion our cause throughout Chicago. On behalf of our hard-working students – the future leaders of Chicago – we thank you for your invaluable commitments of generosity, leadership and time. We are so grateful.

STATEMENTS OF FINANCIAL POSITION

As of June 30, 2009 and 2008

	2009	2008
ASSETS		
CASH AND CASH EQUIVALENTS	\$3,100,885	\$9,167,557
INVESTMENTS	32,862,902	38,114,969
PLEDGES RECEIVABLE – Net	6,289,279	6,062,259
OTHER ASSETS	64,955	52,036
TOTAL	\$42,318,021	\$53,396,821
LIABILITIES AND NET ASSETS		
PLEDGES AND ACCOUNTS PAYABLE	\$3,737,352	\$4,892,155
DEFERRED REVENUE	292,855	269,895
Total liabilities	4,030,207	5,162,050
NET ASSETS:		
Unrestricted	18,295,243	31,533,161
Temporarily restricted	14,847,782	12,211,608
Permanently restricted	5,144,789	4,490,002
Total net assets	38,287,814	48,234,771
TOTAL	\$42,318,021	\$53,396,821

MAKING A DIFFERENCE IN FISCAL 2009

873 Donors contributed funds in fiscal year 2009.

42 Schools serving **8,419** students received operating grants.

4,917 Students at **118** schools received scholarships.

100% of unrestricted donations are used for program expenses.

STATEMENTS OF ACTIVITIES

For the years ended June 30, 2009 and 2008

REVENUES:	
Contributions (net of School Major Gift Campaign contributions)	
Net special event revenue	
Net investment return (excluding School Major Gift Campaign)	
Less amounts designated to other organizations by donors	
Net assets released from restrictions	
Reclassification of net assets	
Adoption of FSP 117-1	

Total revenues

EXPENSES:

Program expense
Management expense
Fund-raising expense

Total expenses

CHANGE IN NET ASSETS

NET ASSETS – Beginning of year

NET ASSETS – End of year

SUMMARIES OF EXPENSES

For the years ended June 30, 2009 and 2008

Operating, capital, and other grants
Scholarships
Administrative expenses

Total expenses

Note: The statements of activities and the summaries of expenses exclude revenues and expenses

2009 CONTRIBUTIONS BY DONOR TYPE

65%
Individuals
(46% in 2008)



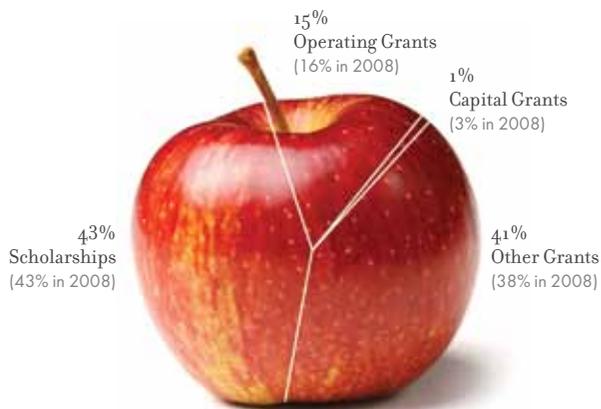
35%
Foundations
& Corporations
(54% in 2008)

2009				2008			
Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
\$3,759,709	\$6,318,054	\$38,919	\$10,116,682	\$4,740,673	\$6,793,597	\$19,434	\$11,553,704
404,147	2,290		406,437	882,428			882,428
(7,424,743)	(62,597)		(7,487,340)	(2,685,223)	15,538	3,125	(2,666,560)
	(794,329)		(794,329)		(1,112,105)		(1,112,105)
5,557,353	(5,557,353)			5,555,766	(5,555,766)		
(615,868)		615,868					
(2,730,109)	2,730,109						
(1,049,511)	2,636,174	654,787	2,241,450	8,493,644	141,264	22,559	8,657,467
11,346,703			11,346,703	9,891,403			9,891,403
501,437			501,437	453,910			453,910
340,267			340,267	241,733			241,733
12,188,407			12,188,407	10,587,046			10,587,046
(13,237,918)	2,636,174	654,787	(9,946,957)	(2,093,402)	141,264	22,559	(1,929,579)
31,533,161	12,211,608	4,490,002	48,234,771	33,626,563	12,070,344	4,467,443	50,164,350
\$18,295,243	\$14,847,782	\$5,144,789	\$38,287,814	\$31,533,161	\$12,211,608	\$4,490,002	\$48,234,771

Program Expenses	Management Expenses	Fund-Raising Expenses	Total Expenses	Program Expenses	Management Expenses	Fund-Raising Expenses	Total Expenses
\$6,124,759	\$	\$	\$6,124,759	\$5,416,581	\$	\$	\$5,416,581
4,661,019			4,661,019	4,032,265			4,032,265
560,925	501,437	340,267	1,402,629	442,557	453,910	241,733	1,138,200
\$11,346,703	\$501,437	\$340,267	\$12,188,407	\$9,891,403	\$453,910	\$241,733	\$10,587,046

expenses relating to the School Major Gift Campaign, which was a special fund-raising campaign administered by Big Shoulders Fund on behalf of the Archdiocese of Chicago.

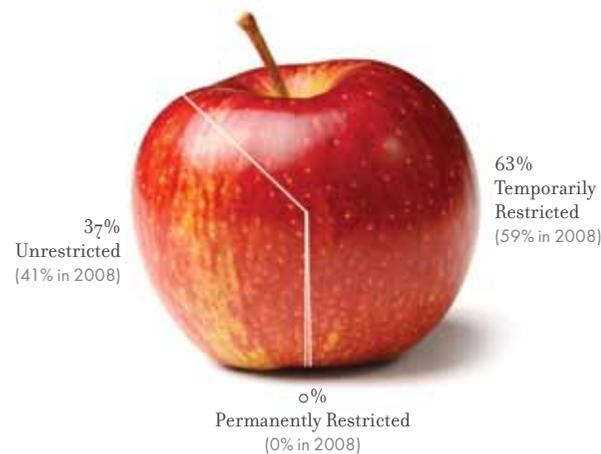
2009 GRANTS & SCHOLARSHIPS BY TYPE



2009 EXPENSES BY FUNCTION



2009 CONTRIBUTIONS BY TYPE OF RESTRICTION



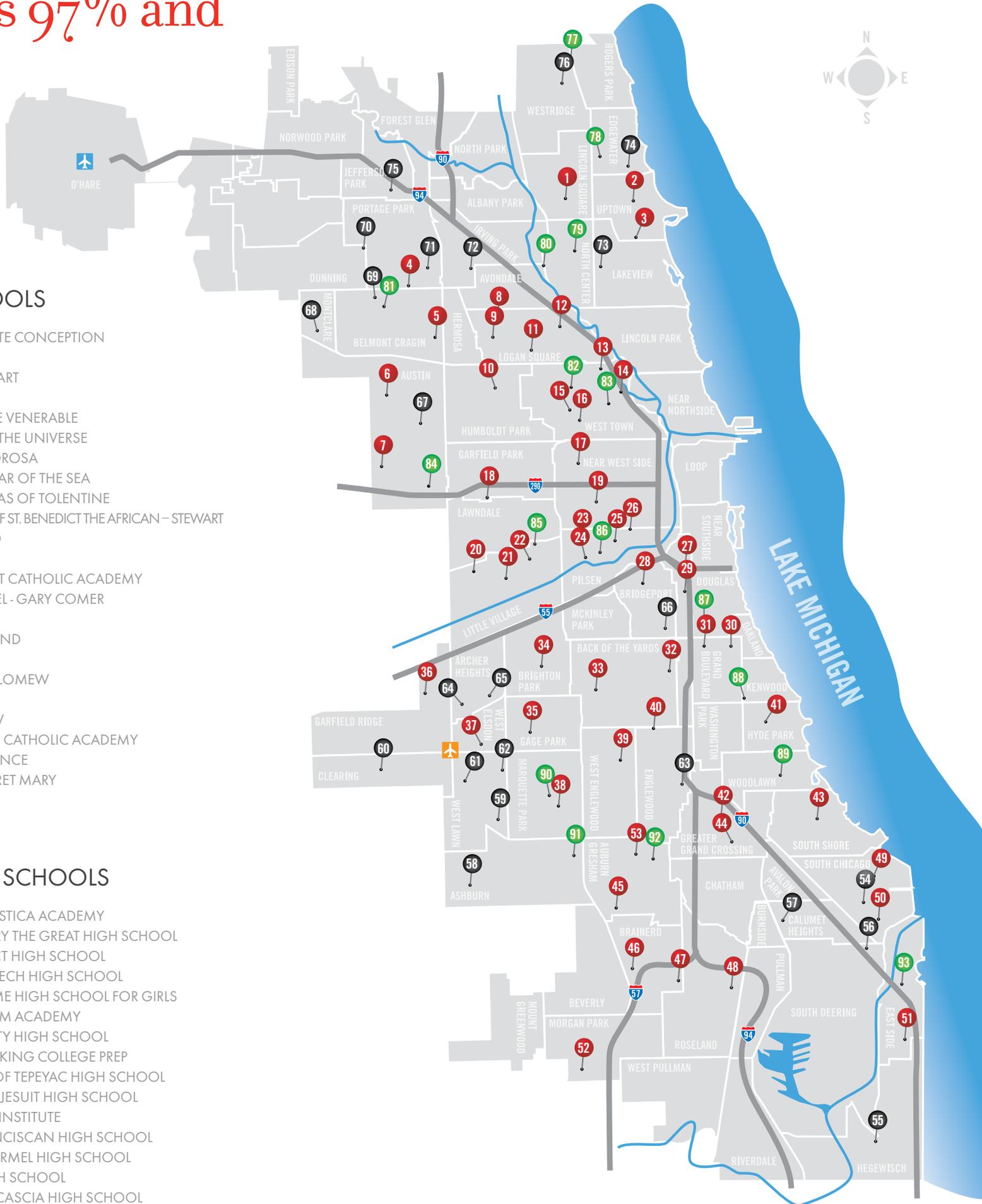
93 inner-city schools. 25,000 students. The elementary attendance rate is 97%. The high school graduation college entrance is 86%.

BSF PATRON SCHOOLS

1. ST. MATTHIAS TRANSFIGURATION
2. ST. THOMAS OF CANTERBURY
3. ST. MARY OF THE LAKE
4. ST. LADISLAUS
5. ST. GENEVIEVE
6. ST. ANGELA
7. ST. CATHERINE OF SIENA/ST. LUCY
8. ST. HYACINTH BASILICA
9. OUR LADY OF GRACE
10. MATERNITY BVM
11. ST. SYLVESTER
12. ST. JOHN BERCHMANS
13. ST. MARY OF THE ANGELS
14. ST. STANISLAUS KOSTKA
15. ST. HELEN
16. ST. NICHOLAS CATHEDRAL
17. ST. MALACHY
18. ST. AGATHA CATHOLIC ACADEMY
19. CHILDREN OF PEACE
20. EPIPHANY
21. ST. AGNES OF BOHEMIA
22. OUR LADY OF TEPEYAC
23. ST. ANN
24. ST. PAUL/OUR LADY VILNA
25. ST. PIUS V
26. ST. PROCOPIUS
27. ST. THERESE
28. ST. BARBARA
29. SANTA LUCIA
30. HOLY ANGELS
31. ST. ELIZABETH
32. ST. GABRIEL
33. SAN MIGUEL - BACK OF THE YARDS
34. POPE JOHN PAUL II
35. ST. GALL
36. OUR LADY OF THE SNOWS
37. ST. TURIBIUS
38. NATIVITY BVM
39. ACADEMY OF ST. BENEDICT THE AFRICAN – LAFLIN
40. VISITATION
41. ST. THOMAS THE APOSTLE
42. ST. COLUMBANUS
43. ST. PHILIP NERI
44. ST. DOROTHY
45. ST. ETHELREDA
46. ST. MARGARET OF SCOTLAND
47. ST. HELENA OF THE CROSS
48. ST. JOHN DE LA SALLE
49. ST. MICHAEL
50. OUR LADY OF GUADALUPE
51. ANNUNCIATA
52. ST. WALTER
53. ST. SABINA



Elementary school student
enrollment rate is 97% and



BSF SCHOOLS

- 54. IMMACULATE CONCEPTION
- 55. ST. FLORIAN
- 56. SACRED HEART
- 57. ST. AILBE
- 58. ST. BEDE THE VENERABLE
- 59. QUEEN OF THE UNIVERSE
- 60. ST. SYMPHOROSA
- 61. ST. MARY STAR OF THE SEA
- 62. ST. NICHOLAS OF TOLENTINE
- 63. ACADEMY OF ST. BENEDICT THE AFRICAN – STEWART
- 64. ST. RICHARD
- 65. ST. BRUNO
- 66. BRIDGEPORT CATHOLIC ACADEMY
- 67. SAN MIGUEL - GARY COMER
- 68. ST. WILLIAM
- 69. ST. FERDINAND
- 70. ST. PASCAL
- 71. ST. BARTHOLOMEW
- 72. ST. VIATOR
- 73. ST. ANDREW
- 74. NORTHSIDE CATHOLIC ACADEMY
- 75. ST. CONSTANCE
- 76. ST. MARGARET MARY

BSF HIGH SCHOOLS

- 77. ST. SCHOLASTICA ACADEMY
- 78. ST. GREGORY THE GREAT HIGH SCHOOL
- 79. ST. BENEDICT HIGH SCHOOL
- 80. GORDON TECH HIGH SCHOOL
- 81. NOTRE DAME HIGH SCHOOL FOR GIRLS
- 82. JOSEPHINUM ACADEMY
- 83. HOLY TRINITY HIGH SCHOOL
- 84. CHRIST THE KING COLLEGE PREP
- 85. OUR LADY OF TEPEYAC HIGH SCHOOL
- 86. CRISTO REY JESUIT HIGH SCHOOL
- 87. DE LASALLE INSTITUTE
- 88. HALES FRANCISCAN HIGH SCHOOL
- 89. MOUNT CARMEL HIGH SCHOOL
- 90. MARIA HIGH SCHOOL
- 91. ST. RITA OF CASCIA HIGH SCHOOL
- 92. LEO HIGH SCHOOL
- 93. ST. FRANCIS DE SALES HIGH SCHOOL

Events.

Tenth Annual Golf Classic

The Big Shoulders Fund Golf Classic is one of the not to miss outings each year hosting 300 golfers at the prestigious Olympia Fields Country Club on the second Monday of August. The day includes a 24-person shootout for a spectacular Rolex watch courtesy of James and Williams Jewelers, a live auction including a week stay at Exclusive Resorts, foursomes at many of the top courses, and two first-class tickets to anywhere in the world courtesy of United Airlines. This year's event was made possible because of the generosity of our numerous sponsors, particularly the Sage Foundation, which has been an underwriter for the event for over five years.

Under the leadership of the Golf Classic committee's Co-Chairmen, Giancarlo Turano and Bill Lagoni, and with the continued support of an active committee, this year drew another sellout crowd raising over \$518,000. Since its inception the outing has provided more than 4,000 scholarships worth \$3 million.

Please join us for the Tenth Annual Big Shoulders Fund Golf Classic on Monday, August 9, 2010 at Olympia Fields Country Club. If you would like more information on the Golf Classic, contact Amelia Drozda (312-751-3850/adrozda@bigshouldersfund.org).



Event
Sage Foundation

Course
McDonald's Charities
The Oakmark International Funds
The Vennetti Family

Platinum
Benetech, Inc.
Howden Group Ltd.
Smith & Wollensky Restaurant

Dinner
Illinois Tool Works

Silver
The John Buck Company
Mike Ditka's Restaurant
Mr. and Mrs. P. Jay Fortner
Houlihan Lokey
Rebecca and Kreg Jackson
Mr. and Mrs. Gerald F. Kelly, Jr.
KPMG LLP

Apparel
Edward Don and Company

Cocktail Hour
Midwest Generation EME, LLC

Single Grill
Kazma Family Foundation

Breakfast
Fair Oaks Farms LLC

Beverage Cart
Thomas D. Grusecki
Family Foundation

Closest to the Pin Contest
James & Williams Jewelers

Transportation
United Airlines
Masters Transportation

Third Annual Big Shoulders Fund Ball

The Big Shoulders Fund and its Auxiliary Board hosted the Third Annual Big Shoulders Fund Ball on Friday, September 25, 2009, at the Museum of Contemporary Art. The event brought together more than 400 of Chicago's leading young professionals who raised over \$55,000 for the Big Shoulders Fund Auxiliary Board Scholarship Fund provides financial assistance to deserving students in Chicago's inner-city Catholic schools

The celebration included a VIP Reception with a Glenfiddich Scotch tasting, a fast paced live auction with a stay at Casa Canela and two first class world trip tickets to anywhere United Airlines flies, an engaging silent auction while enjoying cocktails provided by William Grant & Sons and Reyes Holdings.

This event would not have been possible without the tireless work and dedication of the entire Auxiliary Board, in particular the Executive and Fundraising Committees, under the leadership of fundraising chair, Vladan Jovanovic. A special thank you to the Big Shoulders Fund Ball co-chairs Heidi (Ginter) Rodenbaugh and Kathleen Hanley for spearheading this year's event.

Please plan to join us next year for the Fourth Annual Big Shoulders Fund Ball on Friday, October 1, 2010 at the River East Arts Center! Visit www.bigshouldersfund.org for more details or to learn more about the Auxiliary Board.



EVENT

CareerBuilder.com

PLATINUM SPONSOR

Robert W. Baird & Co.

ENTERTAINMENT

Fig Media

HORS D'OUERVES

Turano Baking

COCKTAIL

William Grant & Sons

Reyes Holdings, LLC

SILVER

AEG Partners LLC

@properties and Brett Huelat

The Delves Group

MB Financial Bank

SPONSOR

Ropes & Gray, LLP

TRANSPORTATION

United Airlines

Tenth Annual Lend a Shoulder Day

One of the marquee events for Big Shoulders, Lend a Shoulder Day, marked its tenth year. Setting a new record, 230 attendees visited Big Shoulders Fund schools and participated in science fairs, completed art projects, visited classrooms, etc. A new addition this year was a partnership with KPMG LLP employees who visited five schools and not only distributed books that they were donating, but read to the students as well.

"Thanks to the generosity of Chicago's corporate leaders, individuals, foundations and companies, like KPMG, the Big Shoulders Fund has been helped to strengthen inner-city Catholic schools in some of the neediest areas of Chicago for more than 24 years," said Josh Hale, executive director of the Big Shoulders Fund. "Lend a Shoulder Day provides an opportunity for individuals interested in making a tangible change to learn how they can make a meaningful impact on a child's life. There is no better place to see the impact you can make or the hope for the future than by interacting with students in the classroom."

Nearly 100 KPMG employees participated in KPMG's Family for Literacy initiative. The Family for Literacy initiative is a program in which employees and their families purchase books, conduct reading programs in schools, and work with existing literacy programs to distribute books to disadvantaged children in KPMG communities nationwide.

"KPMG is proud to partner with Big Shoulders on this Lend A Shoulder Day as the firm is very much focused on giving back to the communities in which we live and work," said Daniel Doherty, Advisory Managing Partner at KPMG. "As a member of the Big Shoulders Fund board of directors, I see first-hand the incredible work accomplished by the Big Shoulders Fund on behalf of under-privileged kids in our city and I encourage



all Chicago businesses to join in the effort."

Attendees came together after the morning of school visits to enjoy lunch at Smith & Wollensky where participants recounted the day at the different schools. Big Shoulders Fund leadership James O'Connor, John Canning and Monsignor Ken Velo shared an update on Big Shoulders and its activities as well.

Mark your calendars for the 2010 Lend a Shoulder Day on Thursday, October 28, 2010. If you would like more information on the Lend a Shoulder Day, contact Amelia Drozda (312-751-3850/adrozda@bigshouldersfund.org).

Second Annual Bowl for Big Shoulders

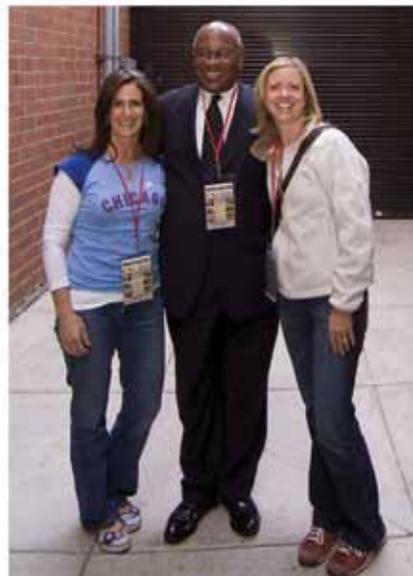
In 2008, Michael Spencer and 10pin bowling lounge, known for its upscale take on favorite American fare, swanky-chic alleys and wing-tip bowling shoes, agreed to partner with the Auxiliary Board for a fundraising event called the Bowl for Big Shoulders.

The event included a Rock Band contest, additional contests and a terrific silent auction. The continued generosity of 10pin bowling lounge enabled the Auxiliary Board to sell out the event two weeks before and triple the dollars raised from the past year.

The funds raised from the night went toward the Big Shoulders Fund Auxiliary Board Scholarship to provide tuition assistance to more than a dozen Big Shoulders students. Big Shoulders hosted the event again in 2010 to an early sellout crowd.

If you would like more information on the Bowl for Big Shoulders event, contact Amelia Drozda (312-751-3850/adrozda@bigshouldersfund.org).





WRIGLEY ROOFTOP

Big Shoulders Fund supporters have continued to go above and beyond year after year. It is extremely difficult for Big Shoulders to thank them for all they do. However, through the partnership and tremendous generosity of Tom Gramatis and Paul Bauch of Wrigley Rooftops, Big Shoulders was able to thank 250 generous supporters, Patrons and Directors on May 12, 2009 with a night of baseball, great food and drink at the plush Wrigley Rooftop.

The night was a great way to bring together all those who catalyze change in Chicago's inner-city schools through their generosity with camaraderie and a Cubs win! A special thanks to Tom Gramatis and Paul Bauch for their generosity and assistance in arranging the event.



PNC ROAD TO WRIGLEY

On Sunday, August 9, 2009, the hottest day of the year, more than 50 scholars were given a unique opportunity, the chance to recite the Pledge of Allegiance and run the bases, during PNC's '09 Road to Wrigley where the Iowa Cubs took on the Las Vegas 51's at Wrigley Field. The day was made possible thanks to the generosity of PNC Financial, and their Illinois President and CEO, Joe Gregoire, who also provides scholarships for 10 elementary students.

The special day included the chance to watch a game from behind the ivy in the Batter's Eye while enjoying great food and drink. Big Shoulders Fund Executive Director Josh Hale also threw out the ceremonial first pitch. The day was once-in-a-lifetime experience for many Big Shoulders Fund students.



GIVE BACK DAYS

Three years ago, the Auxiliary Board was looking for an opportunity to bring together members through a Saturday service day. What started as a small group of 10 to 20 young professionals helping a school through cleaning, painting, landscaping and simple organization has grown into a phenomenon that hosts 125 to 200 volunteers six times a year.

Big Shoulders has found these service days as great ways to form new partnerships. Attendees include alumni from University of Chicago School of Business, University of Dayton, Holy Cross College, Kellogg School of Management, Marquette University, St. Mary's College, University of Notre Dame and Saint Xavier University, parishioners from St. Alphonsus, St. Clements, Holy Name Cathedral and Old St. Pat's and other organizations such as the 21 Club, ICCW Junior Board, PEAC and the Young Irish Fellowship.

Going beyond just a morning of service, this has become an opportunity for people to learn more about Big Shoulders schools. The transformation of each school leaves the volunteers inspired and provides a better learning environment for hardworking school staffs and students.

Ways to Give.

No matter what size, every contribution is important. Your gift strengthens Chicago's inner-city Catholic schools through scholarships, special education programs, instructional equipment, school facility improvements, faculty support, operating grants and so much more!

Because of an endowment formed by early board members and income from investments, Big Shoulders is able to distribute 100 percent of contributions to support the mission of 93 Catholic schools. These schools serve as beacons of hope for generations of children and families regardless of their ethnic, racial or religious backgrounds.

There are many ways to make a tax-deductible gift to support Big Shoulders Fund, such as:

Cash Gifts. Mail checks to Big Shoulders Fund at: 309 West Washington Blvd., Suite 550, Chicago, IL, 60606. Make a secure online donation with any major credit card at www.bigshouldersfund.org. Make a gift using any major credit card over the phone by calling 312-751-8337.

Matching Gifts. Contact your human resources department to determine if your gift to Big Shoulders can be matched to increase the impact of your gift. More than 22,000 companies offer matching gifts to their employees through matching gift programs. Typically, donors must initiate the matching gift by submitting an organization's matching gift form with their donation.

Planned Gifts. Make a planned gift arrangement or bequest, which entitles you to become a member of The Joseph Society. This group is comprised of friends who have made a special commitment, through a planned gift arrangement, to the children attending Catholic schools in the neediest

areas of inner-city Chicago. If you are interested in learning more about planned giving, please contact Rebecca Lindsay-Ryan, Director of External Affairs, at 312-751-3851/rlindsayryan@bigshouldersfund.org.

Gifts of Securities. Make a gift of securities (stock) by having your broker contact Big Shoulders to transfer the shares to our account. Please contact Linda Rossi, Controller, for further information or to make your gift of securities at 312-751-5294/lrossi@bigshouldersfund.org.

Pledges. Make a multi-year pledge to Big Shoulders Fund to support the Patrons Program, scholarship assistance, capital projects or for the greatest need. For more information on how your multi-year pledge can make a difference, please contact Joshua Hale, Executive Director, at 312-751-5395/jhale@bigshouldersfund.org.



Help Make a Difference.

For more than 24 years, the Big Shoulders Fund has undertaken the responsibility of helping Chicago's inner-city children to achieve their dreams through access to a quality, values-based education. However, we need your help to make this possible. There are many ways to make a difference and we hope you will get involved.

Donate. Make a gift individually, as a family or through your company.

Participate. Attend our annual Lend a Shoulder Day where friends get a glimpse of what happens at the schools through visits, attending class and networking.

Mentor. Mentors work directly with students and are placed whenever possible in the school of their own choosing or, if the mentor is able, where the need is the greatest. If you are interested in learning more about the mentoring opportunities, please contact Tom Zbierski, Director of School Relations at 312-751-8365/tzbierski@bigshouldersfund.org.

Build. Join or create a Patron Advisory Board. The Patrons Program is seeking bright, committed women and men to serve on Patron Advisory Boards. Our schools are in need of professionals who are interested in contributing a small amount of their time and talent in the areas of marketing, accounting, fundraising, capital improvements, construction and technology. Individuals can be a part of these boards who are working to build a sustainable, vital future for Catholic schools in Chicago. If you are interested in learning more about joining a Patron Advisory Board, please contact John Moran, Director of the Patrons Program at 312-751-3807/jmoran@bigshouldersfund.org.

Fundraise. Help plan the annual Big Shoulders Fund Golf Classic which raises essential scholarship funds to enable children to attend inner-city Catholic schools. We are always seeking new members for the Golf Classic committee. Dedicated volunteers from the civic and business community plan the event and solicit sponsors, auction items, donations and foursomes. For more information, to golf or to join the committee, please contact Amelia Drozda, Associate Director for Events and Publications at 312-751-3850/adrozda@bigshouldersfund.org.

Join. Become a part of the Auxiliary Board which is designed to engage active and altruistic young professionals. Members can be part of three committees: Fundraising, Outreach and Schools. Through these committees members are able to help plan fundraisers, volunteer with Big Shoulders schools and children, and work to increase the visibility of the Big Shoulders Fund and the Auxiliary Board, and recruit new members. For more information or to join please contact Amelia Drozda, Associate Director for Events and Publications at 312-751-3850/adrozda@bigshouldersfund.org.





Francis Cardinal George has consistently been a strong advocate for the inner-city Catholic schools and the mission of the Big Shoulders Fund. As Honorary Chairman of the Board, he provides leadership, vision and spiritual guidance for the many works of this organization. We are most grateful for his years of generous service and commitment to this most important partnership.

Big Shoulders Fund Team

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The Big Shoulders Fund is 501 (c) 3
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