

# Shoulder **to** Shoulder

WINTER 2013

## Inside



### Partnering with Alain Locke Initiative on Leadership

See page 3

- 4 ... Mazza Scholarships
- 5 ... Polk Bros. Foundation Supports Leadership Development
- 6 ... 25th Anniversary Celebration
- 8 ... Stock Market Program
- 9 ... Joshua Hale Named President and Chief Executive Officer
- 10 ... In the Community



## Securing the Future of Big Shoulders Fund Schools Through Project Enrollment

Big Shoulders Fund schools have seen an increase in student enrollment from Pre-K through third grade.

Enrollment is the greatest opportunity for Chicago's inner-city Catholic schools to serve more deserving children by providing strong academic and enrichment programs. Many have faced the threat of closure due to declining enrollment, an especially dire problem in neighborhoods where the Catholic elementary school is the best option available to area families.

Big Shoulders Fund has identified enrollment stability and growth as its top priority in recent years, developing several strategic initiatives under the banner Project Enrollment. Through marketing support and enrollment incentives, Big Shoulders has been able to help turn the tide of declining enrollment at its schools.

### PATRONS PROGRAM: MARKETING

The Big Shoulders Fund Patrons Program provides opportunities for donors to invest in schools and in targeted areas that make a measurable impact, including marketing and recruitment.

continued...

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## Big Shoulders Fund Offers \$1.5 Million in Additional Scholarships for up to 500 Chicago Public School Students

Last fall, while the city was in the midst of the first Chicago Public Schools teacher strike in 25 years, Big Shoulders Fund stepped up to help more Chicago families benefit from a Catholic school education. The Big Shoulders Fund Access Scholarship is providing \$1.5 million in scholarships for former Chicago Public School students who transferred to Big Shoulders Fund schools. With the help of anonymous donors, Big Shoulders Fund offered a two-year \$1,500 per student annual scholarship to any participating Big Shoulders Fund school, \$3,000 total for two years.

This new opportunity was in addition to the nearly 5,000 children annually who receive Big Shoulders scholarships, many including enrichment, mentoring, and support.

The Access Scholarship has made an impact on 52 participating schools through increased enrollment.

"This was a win-win opportunity for everyone: parents, students, and the school community," raved Mariagnes Menden, principal at St. Nicholas of Tolentine. "Parents and students were so grateful that they could be a part of a Catholic school community. Through this scholarship program, St. Nicholas of Tolentine was able to open its doors to new student faces and exceed our enrollment target goal. Words are not adequate enough to express the joy and gratitude of the parents and children who were able to qualify for the program."

Said Big Shoulders President and CEO Josh Hale, "To our knowledge, all 405 students participating in the program are currently attending the schools, and we've heard many heart-warming stories of emotional parents, students being palpably relieved to be in a safe and supportive school environment, students happily fitting into classrooms, students returning to schools they'd left because they couldn't afford the tuition, etc. We're very grateful to the schools and teaching staffs for working to integrate these students into the school community after the beginning of the school year. While we're certain there will be challenges, we're also certain Access has provided a great service to these families and to the schools." ■

(Above) Technology in the classrooms is a real selling point for most families. Here students use an interactive white board.

...continued from cover

## Project Enrollment

St. Mary of the Angels School in the West Town neighborhood has experienced exceptional growth during the past three years, thanks to the leadership of Principal Beth Dolack and Marketing Director Elise Bartzen. Enrollment for the 2011–12 school year was at 200, up from 125 in 2009–10, and the school anticipated enrolling as many as 220 students in 2012–13. Dolack and Bartzen focused on growing enrollment from the bottom up, emphasizing Pre-K recruiting with the hope that once families are in the door, they'll remain there. Bartzen went out into the community, talking to parents pushing strollers on the surrounding blocks and engaging school-age families. As a result, St. Mary has become a true neighborhood school, with a large number of its families living within walking distance.

"I am thrilled to see all the new faces," said Dolack, "and I know none of this would be possible without the hard work and spirit of our entire staff and the support of Big Shoulders."

In the Latino community of West Logan Square, Our Lady of Grace School also benefited from hiring a marketing director, Anahi Lazarte. Her ability to conduct tours and answer questions in Spanish not only assisted in recruiting new families, but also increased the satisfaction of those already enrolled. The school welcomed more than 200 students during the past year, up from 175 in 2008–09.

"Knowing the language helps, but it is more important that Latino families have a meaningful relationship with the school," said Lazarte. "Latino families are very committed to their children's education and faith formation. We just have to build on that by responding to their specific educational and cultural needs and by developing a strong sense of community."

### ENROLLMENT INCENTIVES

In conjunction with the marketing efforts, Big Shoulders recognizes the reality that, even if families wanted to attend their neighborhood Catholic schools, some still could not afford to attend. So, in addition to its longstanding scholarship programs, Big Shoulders provided schools with vouchers as enrollment incentives to make the option more affordable for families in need.

Sue Sullivan, who, with her husband Tim, is Patron of both St. Barbara and Santa Lucia Schools, said, "We identified St. Barbara and Santa Lucia as great schools, and our goal has always been to help them serve more children. It's nice to know Big Shoulders has the enrollment incentive and scholarship programs to leverage with our investment as Patrons in enrollment marketing."

## "families need that last bit of assistance to make school affordable"

Schools received either 11 or 22 vouchers, each worth \$350, and were required to provide matching funds. During the 2011–12 school year, this incentive amounted to nearly 1,200 vouchers.

"We're increasingly finding that families need that last bit of assistance to make school affordable," said St. Barbara School Principal Dorene

continued on page 9...

Numerous decisions—selecting textbooks and syllabi, evaluating teachers, repairing the roof, engaging with parents, balancing school finances, and other important tasks—fall on the shoulders of one person: the principal. Recognizing that school and student success go hand in hand with the principal's leadership capabilities, Big Shoulders Fund has developed a holistic leadership development program to build a pipeline of well-trained school leaders. As part of this program, Big Shoulders has expanded its relationship with The Alain Locke Initiative to provide principals direct access to cutting-edge management strategies at the Accelerate Institute, in partnership with Northwestern University's Kellogg School of Management. These strategies translate into key drivers principals must master to accelerate student achievement school-wide.

Big Shoulders President and CEO Josh Hale said, "Effective, engaged school leaders are essential to success, and the Accelerate Institute provides one of the strongest levers for principals to become agents of change."

## The Alain Locke Initiative Provides Leadership Training for Big Shoulders Fund Principals



Pat Ryan Jr.



Geralyn O'Rourke Lawler



Janie Flores



Bridget Agnew de la Peña

The Alain Locke Initiative is a nonprofit education organization that, for more than 20 years, has a successful track record of closing the achievement gap. Pat Ryan Jr., co-founder and CEO of *INCISENT Labs*, founded the organization in 1991 based on his firm belief that all children deserve an equal education. Ryan's experience as a teacher on Chicago's West Side, and later a gang narcotics officer in the same neighborhood, strengthened his conviction. Three programs anchor the organization: Inner-City Teaching Corps (ICTC), which has trained some 400 top-talent teachers for Chicago's under-resourced classrooms; Alain Locke Charter School, which the U.S. Department of Education recognized as one of seven schools in the United States best "Closing the Achievement Gap," and which set the record for the highest test score gains in the history of the ISAT; and The Ryan Fellowship, of which the Accelerate Institute is the first phase in creating the next generation of achievement-accelerating principals at urban charter schools nationwide.

"Principals are the catalyst who lead the transformation of schools," said Ryan. "We are pleased to help Big Shoulders principals develop capabilities to create transformational academic experiences for their students."

"Our model is based on the proven success of our charter school, and the key accelerators employed by other high-performing schools across the country," remarked The Alain Locke Initiative CEO Rob Birdsell. "We are excited to share the practices that drive achievement with Big Shoulders schools to build on our longstanding partnerships."

Last summer, three principals from Big Shoulders schools—Geralyn O'Rourke Lawler, St. Angela School; Janie Flores, St. Gall School; and Bridget Agnew de la Peña, St. Michael the Archangel (South Shore)—trained alongside Ryan Fellows and Cristo Rey Network participants, and during the school year, they receive coaching and assistance with their implementation plans.

"Accelerate Institute focuses on how to lead effectively by motivating staff, students, and parents," said Lawler, in her second year as St. Angela's principal. "This program has shown me that school leaders must truly understand that how we manage our schools affects our students' success."

An effective principal is a "force-multiplier" by ensuring student academic gains year after year. Given the typical 10-year tenure of a well-prepared, high-impact principal, each Big Shoulders Fund school leader will impact hundreds, if not thousands, of students. ■

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# Mazza Scholarships Brighten Outlook for Families



Providing opportunities for young learners who might not otherwise have had access to a quality education is among the most satisfying undertakings of Big Shoulders Fund. Generous donors like the Mazza Foundation ensure that Big Shoulders continues to satisfy this goal.

Eighth grade graduation at St. Pius V.

The Mazza Foundation Scholarship Program provides tuition assistance to economically disadvantaged families committed to a Catholic education. Launched in 1998, the program offers \$500 scholarships to approximately 50 qualifying elementary students each year. In the 2008–09 school year, the program expanded into high school, offering support to 10 freshmen who were former Mazza elementary scholars. These scholarships, providing \$3,100 per year to each student, are renewable through graduation.

The program promotes the importance of a good education, and the results bear that out: 70 percent of Mazza scholars have continued on to Catholic high schools in the past two years, and those receiving support in high school enrolled in college at rates higher than city, state, and national averages (according to the National Student Clearinghouse). From the class of 2011, 100 percent of Mazza scholars currently attend four-year colleges; overall, 80 percent of Mazza scholars from the classes of 2009–11 are enrolled in colleges or universities—well beyond city, state, and national averages.

Students and their families who have benefited from Mazza Scholarships have enthusiastically expressed their gratitude.

“I know how difficult it was for my parents to pay tuition for me and that without your assistance they probably would not have been able to afford to send me to St. Laurence,” said David O. Sode. “I realized this early on and set a goal to do my very best to obtain good grades in appreciation of your scholarship and my parents’ sacrifice to provide me with a good education. I have been on the Honor Roll since my freshman year, was inducted into the National Honor Society in my sophomore year, and have

been active in several clubs at school...I am still doing my best to complete my senior year with good grades. I have continued to be on the Honor Roll...I will be attending the pre-veterinary program at St. Xavier University this fall. I have received a \$40,000 academic scholarship...”

David’s mother Yvonne commented, “We have always been a financially struggling middle-class working family; however our financial situation worsened when my husband became ill at the end of David’s freshman year. My husband Samuel was diagnosed with Stage 4 osteosarcoma (bone cancer) in May of 2009. My mom, who lived with us and helped us raise David, died on April 19, 2010 of complications from knee replacement surgery, and Samuel passed away on August 26, 2011.

“I am sure you understand how grateful we are for the Mazza Scholarship and how it gave David the opportunity to finish his education at St. Laurence. I am extremely proud of his accomplishments and how he is honoring the memory of his grandmother and his dad.”

Student Kathleen Baron wrote, “Without your generous scholarship I might not have been able to go to Resurrection [College Prep High School]. It has allowed me to continue to grow in my faith. I have been an alter server since the fifth grade and currently serve mass monthly. I also am a Eucharistic Minister. The college that I will be attending has a ministry program that helps children in orphanages; they bring food and administer vaccines here and in other countries...I [graduated in] May with Honors and in August I will be attending Lewis University where I plan to get a bachelor’s degree in the science of nursing...Most importantly you have taught me the importance of giving back to others in need...” ■

# Polk Bros. Foundation Supports Leadership Development and Academic Progress



St. Therese Chinese Catholic School is located in the heart of Chicago's Chinatown community.

Principals face daily challenges that turn their attention almost entirely toward the inner workings of their schools, managing people, offices, and programs. So an occasion to turn outward and confer with their colleagues offers them a valuable opportunity to consider the big picture.

The Polk Bros. Leadership Network, now in its third year, offers award-winning principals the chance to step outside their usual environments and confer with their colleagues through quarterly meetings. At the May networking meeting, Big Shoulders Fund Board Co-Chairmen John Canning and Jim O'Connor shared innovative ideas and resources for supporting new teachers and important leadership skills, and in June, the topic was social-emotional learning and discussion on Positive Behavioral Interventions and Supports.

Through these meetings, the principals were able to discuss these important issues and gather ideas from their colleagues. Most were quite satisfied with the presentations and the ability to implement the knowledge they gained into daily work, as well as with the skills and strategies they learned, the resources they acquired, and the chance to collaborate with other participants. Anecdotally, many of the leaders spoke about the importance of this aspect of the program to bring together leaders who are sometimes isolated in decision-making and benchmarking.

"Throughout the school year, a principal's professional development can become muted as he or she works as the chief operating officer of a business dealing with issues that arise constantly," commented Big Shoulders Fund Senior Director of Academic Programs and External Affairs Rebecca Lindsay-Ryan. "Having time set aside for development and professional growth positively impacts the future of these schools."

To expand upon the benefits of this network, during the coming year the participants will take part in an online forum to discuss challenges and accomplishments throughout the year in addition to the quarterly meetings. ■

Another part of the Polk Bros. Foundation's support is the Polk Bros. Leadership Incentive Grant, established 20 years ago, which recognizes the extraordinary leadership of dedicated principals with limited resources. This year, Big Shoulders distributed funds to 20 schools, enabling them to purchase such educational materials as interactive white boards, bilingual reading materials, iPads, foreign language resources, countless curriculum materials, and sets of laptops. These awards impacted nearly 5,000 students, 200 teachers, and almost 50 administrators and staff.

Among the schools receiving the most recent awards was St. Therese Chinese Catholic School, which until recently was in danger of closing. Then Big Shoulders stepped in with financial and operational support to keep the doors open. "Through Big Shoulders and the Polk Bros. Award, we were able to purchase enrichment materials we would ordinarily not be able to buy," said Principal Phyllis Cavallone. "These supplementary materials and supplies allow us to be competitive on a national and global scale. Within eight months, St. Therese won two national recognitions: the national Blue Ribbon Award from the U.S. Department of Education and the Intel Schools of Distinction!"



## Big Shoulders Fund 25th Anniversary Celebration Raises \$6.25 Million



After many months of planning and a night of careful execution, the 25th Anniversary Dinner was an incredible success! The event raised \$6.25 million, making it the most successful fundraising event for a nonprofit in Chicago's history. Almost 1,000 distinguished guests joined in honoring Big Shoulders' 10 Founders and 25 years of ensuring Chicago's inner-city children have the chance to study for a brighter future.

(Left) Four-foot replica iPads featured "apps" of the 10 Big Shoulders Founders as a tribute to their innovation and generosity and the 500 iPads donated to Big Shoulders Fund schools.



(Above L-R) Big Shoulders Founding Vice Chairmen Lester Crown and Andy McKenna Sr., Mayor Rahm Emanuel, and Big Shoulders Co-Chairman John A. Canning, Jr.

(Below) Big Shoulders Fund Choir performed for guests at the 25th Anniversary Dinner.

(Above) To commemorate 25 years of carrying children's dreams in Chicago, Big Shoulders thanked the 10 Founders with a Chicago Bulls-style introduction including Big Shoulders Fund jerseys.

(Top) *Invest in a Child*, a Big Shoulders Fund short film produced by TeamWorks Media, debuted to a captivated audience. The documentary follows the day-to-day lives of students and the impact Big Shoulders Fund has on their lives and future. View the documentary at [bigshouldersfund.org](http://bigshouldersfund.org).





## TAKING STOCK:

# Students Learn to Manage Money Through Big Shoulders' Stock Market Program

The Big Shoulders Fund Stock Market Program wraps up the year with a trip to the Chicago Board of Trade, where students view the action on the trading room floor.

Creating opportunities for professionals to share their knowledge with students has immeasurable value for both sides of the equation: the students learn about an industry or profession from the experts, and the adults spark interest in a particular field among members of the next generation.

The Big Shoulders Fund's Stock Market Program is a successful example of this type of interaction, placing volunteer business leaders in classrooms to teach the basic principles of saving, investing, and the stock exchanges. The children, all eighth graders, use donated funds from Big Shoulders volunteers to create a hypothetical stock portfolio and pick their own stocks, based on actual research of companies. Once a month, the volunteer executives teach new aspects of investing and saving and give students an option to change their portfolios.

In 2001, Charlie Bobrinskoy, vice chairman of Ariel Capital, expanded some of his previous volunteering work to include eighth graders at St. Philip Neri School. Having grown up on the South Side, Bobrinskoy wanted to expose inner-city students to basic financial literacy concepts through an interactive learning project.

“Our aim is to foster habits early on that will keep young people out of debt and increase their net worth in the future.”

“Our aim is to foster habits early on that will keep young people out of debt and increase their net worth in the future,” said Bobrinskoy.

During the 2011–12 school year, 22 schools participated in the program, exposing approximately 400 children to the financial markets, personal savings and investing concepts, and careers within the financial industry. Participants also took a field trip to the Chicago Board of Trade and, new this year, the Federal Reserve; WGN-TV/Channel 9 covered this visit on its newscast.

At the end of the year, the money in each portfolio goes to the school, with the student “portfolio managers” each receiving a small management fee from their respective portfolio's earnings. In 2009, with 12 schools, the program added a friendly competition, recognizing the school with the highest portfolio return. In 2011–12, St. Pius V, led by Citadel's Jim Hoeg, a Big Shoulders Fund director who leads the program with Bobrinskoy, had the best-performing portfolio, increasing its value by 23.6 percent.

“The students' faces light up when we check on the performance of their stocks,” Hoeg said. “It's very rewarding to see the students so engaged and eager to learn.”

This year, Big Shoulders has increased the number of participating schools to 31 and the number of students impacted by the program. ■



...continued from page 2

## Project Enrollment

Hurckes. “By providing the Project Enrollment incentive, we were able to work with 10 families. Their children have been a wonderful addition to our school community, and their parents couldn’t be happier with their decision to come to St. Barbara School.”

### PROFESSIONAL DEVELOPMENT

Though Big Shoulders has invested in improving marketing in its schools, it became clear that placing inexperienced marketing directors in schools wouldn’t be effective without some training. Under the leadership of John Moran, senior director of the Patrons Program, Big Shoulders initiated a series of professional development clinics for marketing directors that provided opportunities to interact with other marketing professionals to build successful strategies. In 2009, Big Shoulders decided to collaborate with the Archdiocese of Chicago in running a quarterly professional development program for principals and marketing directors, aimed at increasing enrollment.

To increase local outreach and effectiveness, Big Shoulders also offers a summer fellows program, now in its fourth year, which deploys college

“Walking through some of those neighborhoods made me realize how crucial it is to keep these inner-city Catholic schools open because they act as a safe haven for many students.”

students and recent graduates to promote local Catholic schools through targeted local marketing efforts such as community events and street fairs. The fellows also work at individual schools to support the growth of their marketing and retention efforts.

Joanna Lucca heard about the fellowship opportunity from her sisters, who serve on Big Shoulders’ Auxiliary Board. “I had a great experience participating in the program,” she said. “Some days I canvassed in neighborhoods that have a school Big Shoulders supports. Walking through some of those neighborhoods made me realize how crucial it is to keep these inner-city Catholic schools open because they act as a safe haven for many students.”

### ADVERTISING CAMPAIGN

To support the schools’ marketing efforts, Big Shoulders has initiated annual advertising campaigns aimed at attracting families to inner-city Catholic schools. These campaigns, which include advertising on CTA buses and trains and banners in strategic locations, not only increase awareness of the nearby schools but also remind the public about Big Shoulders’ overall purpose: to offer economically challenged families the opportunity for a better education.

In just six years, Project Enrollment’s efforts have already paid off: enrollment at the schools Big Shoulders supports has increased for the past three years—a first in Big Shoulders’ history. The goal is to keep that streak alive in perpetuity. ■



### Big Shoulders Fund Names Joshua Hale President and Chief Executive Officer

Big Shoulders Fund recently announced the promotion of Joshua Hale to President and Chief Executive Officer.

Since joining Big Shoulders as executive director in 2005, Hale has helped the organization raise \$94 million, an amount that nearly surpasses funds raised in the previous two decades. In addition, Big Shoulders has maintained its fundraising efficiency at or below three percent while nearly tripling its donor base and engaging more next generation leadership. During Hale’s tenure, Big Shoulders schools have achieved their most stable enrollment in more than 20 years, contrary to national trends.

In his new position, Hale will build the organization’s role as an active investor in inner-city Catholic schools by creating unique models that drive enrollment and track students from elementary school through college. ■



# Big Shoulders Fund in the Community



5



1. The Fifth Annual Bowl for Big Shoulders welcomed a sellout crowd and raised nearly \$18,000, almost a \$3,000 increase over last year, to further support the Auxiliary Board Scholarship Fund.
2. On the sunniest and warmest St. Patrick's Day in recent memory, more than 1,000 Big Shoulders Fund Scholars, Gallagher Scholars, and their friends and families marched along with the Big Shoulders Fund float recognizing the 25th anniversary.
3. Big Shoulders Fund thanks Mark Masseur, principal/creative director of Symmetri Marketing Group, and his team for their wonderful design and production work on publications for the Big Shoulders Fund 25th Anniversary Celebration. The commemorative books were astounding, and Big Shoulders cannot thank Mark enough for his leadership and creativity in branding and executing the vision from the Communications Committee led by Bill Lynch. A very special thanks to Mark Masseur, Jim Dyer, and Tom Balla and his team at Pictureboy Creative. (L-R) Monsignor Velo, Mark Masseur, and his wife Lisa Masseur at the Big Shoulders Fund Cubs Rooftop Outing hosted by Wrigley Rooftops.



6



7

4. In a wonderful kick-off to summer, Big Shoulders had more than 250 supporters from the Auxiliary Board, Chairmen's Advisory Council, Gentleman Sports and Social Club of Chicago, Girl Scouts of Greater Chicago and Northwest Indiana, University of Chicago Booth Alumni Club, University of Dayton Alumni Club, Fairfield Alumni Club, Holy Cross Alumni Club, St. Mary's Alumni Club, Old St. Pat's Parish, and St. Clement Parish, along with more than 100 school staff members, families, and teachers, participated in a day of service, food, and games at five Big Shoulders schools.
5. The Sixth Annual Big Shoulders Fund Ball brought together more than 700 of Chicago's leading professionals, raising more than \$75,000 for the Big Shoulders Fund Auxiliary Board Scholarship and celebrating the dedication of the faculty and staff at the 93 Big Shoulders schools serving the neediest communities in Chicago. Since its inception, the Big Shoulders Fund Ball has raised more than \$210,000 to support scholarships. STEM scholars welcomed guests to the Adler Planetarium by sharing their new science knowledge.
6. Big Shoulders had a great turnout for the CareerBuilder.com Service Day May 18, with more than 250 CareerBuilder.com employees volunteering at five host schools: Gordon Tech, Holy Angels, Santa Lucia, St. Genevieve, and St. John Berchmans.
7. Sixty-five students attended Brush Creek Ranch in Saratoga, Wyoming last summer. To prepare for the science enrichment trip, students attended out-of-school sessions in science, including astronomy, ecology, and zoology. In addition, students learned about health, wellness, and nutrition from Dan Houlihan of Emergence Fitness. To ensure that students were healthy and ready to be active at Brush Creek, Houlihan taught the students exercises to do at home daily with family and friends.

## BIG SHOULDERS FUND

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# Big Shoulders Fund.®

## FROM THE ARCHIVES

### Excerpts from remarks by James J. O'Connor November 2, 1988

Since we began our efforts over two years ago, more than \$16 million in cash and pledges has been donated to Big Shoulders. These gifts made it possible for us to donate \$4 million in operating, capital grants, and scholarships to inner-city schools last year.

I am very pleased to announce today the distribution of \$4.5 million in grants to our inner-city schools. This is a 12 percent increase over last year. We are very pleased with this growth in the Big Shoulders Fund. We are grateful to all of you for making this possible.

This year we will give \$1.74 million in operating funds to 60 inner-city schools to help them continue to provide educational opportunities to over 41,000 young people. We will also provide \$825,000 to 13 schools for much-needed capital improvements. ...Along with these grants, Big Shoulders will contribute \$1.5 million to the Educational Endowment...

New this year is the Big Shoulders High School Scholarship Program. Thirteen Archdiocesan inner-city high schools will share in this program to help students who want to continue their Catholic education....

The schools we are helping can be found in virtually every neighborhood in the city, from Rogers Park to Pullman and from Pilsen out to Austin. The children enrolled in these schools represent every ethnic, religious, and racial group present in Chicago. Over 80 percent of these children are minorities and 40 percent non-Catholic.

With the announcement of these grants, Big Shoulders has now contributed \$8.5 million to the inner-city schools of the Archdiocese. The operating and capital grants, scholarship dollars, support for the Endowment



Fund, and programs for teacher training and summer magnet schools have made a difference. ...these grants have created an environment of hope in neighborhoods faced with serious educational challenges.

The goals of Big Shoulders remain the same today as when we first began: to provide the young people in the inner city with the tools they need to become competent, well-educated, and ethically responsible members of the community; to educate a new generation of qualified employees that will motivate businesses to remain in the city and increase employment opportunities; and to maintain our schools as places where the environment will encourage children's development as secure, caring, and trusting people. The realization of these goals will create a better future for all of us. ■