



MEMORANDUM

To: Board of Directors – Big Shoulders Fund
From: Joshua Hale
Date: October 8, 2009
SUBJECT: SEPTEMBER 2009 AND FISCAL YEAR¹ GIFT / PLEDGE REPORT

FUNDRAISING

	<u>Sep-09</u>	<u>Current YTD</u>	<u>Sep-08</u>	<u>Prior YTD</u>
Funds Raised Total	\$ 1,534,163	\$ 2,926,045	\$ 199,292	\$ 1,191,094
Funds Raised By Donor Type				
Individuals	\$ 1,015,193	\$ 1,744,745	\$ 246,116	\$ 592,704
Foundations / Corporations	\$ 474,843	\$ 972,343	\$ 27,125	\$ 471,060
Stock Gain / Loss			\$ (3,225)	\$ (8,501)
Net Event Income	\$ 44,127	\$ 208,957	\$ (70,724)	\$ 135,831
Total	\$ 1,534,163	\$ 2,926,045	\$ 199,292	\$ 1,191,094
Funds Raised By Category				
Unrestricted	\$ 184,956	\$ 365,163	\$ 234,640	\$ 324,199
Scholarship	\$ 1,059,030	\$ 1,357,855	\$ (45,571)	\$ 428,098
Capital	\$ -	\$ -	\$ 25	\$ 1,075
Programmatic	\$ 290,177	\$ 688,027	\$ 10,250	\$ 88,513
Patrons		\$ 515,000	\$ 48	\$ 349,209
Total	\$ 1,534,163	\$ 2,926,045	\$ 199,392	\$ 1,191,094
Number of New Pledges & Cash Gifts By Amount				
\$1,000,000 +	0	0	0	0
\$500,000 - \$999,999	1	1	0	0
\$250,000 - \$499,999	1	3	0	0
\$100,000 - \$249,999	1	4	0	2
\$10,000 - \$99,999	6	18	5	23
\$1,000 - \$9,999	8	29	8	27
\$1 - \$999	54	116	55	129
Total	71	171	68	181
Donor Meetings	14	23	9	29
Prospect Meetings	14	31	7	27

*The Big Shoulders Fund has raised \$183,220,945 since the Fund's inception.
(Through September 2009)*

¹ Fiscal Year is July 1st to June 30th.

TOTAL GRANTS AWARDED – SEPTEMBER 2009²

	<u>September 2009</u>	<u>September 2008</u>
Number of Grant Requests	12	2
Approvals	4	1
Denials	1	0
Total Grant Money Awarded	\$150,000	\$10,000
Grant Reports Submitted	8	4

PATRON PROGRAM

	<u>As of Sept. 30, 2009</u>	<u>As of Sept. 30, 2008</u>	<u>As of Sept. 30, 2007</u>
Patron Schools	62	58	49
Patrons (includes co-patrons)	94	84	73

GOLF CLASSIC

<u>Title</u>	<u>2008 Classic (Final)</u>	<u>2009 Classic (YTD)</u>
Corporate Sponsors	\$198,500	\$283,000
Foursomes	232,000	161,000
Donations	115,603	65,615
Raffle Tickets	41,610	35,320
Auction	74,050	105,110
Betting Holes	12,680	14,430
Dinner Reservations	1,000	1,600
Gross Revenue	\$681,443	\$666,075
Expenses	174,080	147,485
Bad Debt	2,000	0
Net Proceeds	\$505,363	\$518,590

EVENTS / PRESENTATIONS

<u>Event</u>	<u>Date</u>
<i>Bowl for a Cause</i>	March 4, 2009
Principal Patron Meeting	May, 1, 2009
Board Meeting	May 14, 2009
<i>9th Annual Golf Classic</i>	August 10, 2009
Auxiliary Board's <i>Big Shoulders Ball</i>	September 25, 2009
<i>Lend a Shoulder Day</i>	November 5, 2009
Board Meeting	December 10, 2009
Reception at Cardinal's Residence	December 15, 2009

MEDIA COVERAGE 2008 - 2009

² This table describes only the grants that were submitted through a formal application process.

<i>Title</i>	<i>Media Source</i>
Big Shoulders Fund Invites All Parents to Consider Catholic School Society: City tragedy draws couple into a cause	Chicago Crusader – April 5, 2008 Crain’s Chicago Business – April 7, 2008
Big Shoulders Fund Invites All Parents to Consider Catholic School SOCIETY: Big Shoulders Fund	El Sol de Chicago – April 11, 2008 Crain’s Chicago Business – April 11, 2008
Local Catholic schools lean on Big Shoulders	Medill Report – April 16, 2008
Executive Director Josh Hale Appears on Radio Big Shoulders Supports Schools	WGN AM-780 – April 18, 2008 Brighton Park and McKinley Park Life – April 24, 2008
The Future of Religious Charities – Online Roundtable http://philanthropy.com/live/2008/04/religious_charities/ Education, Twin Cities Education / Catholic schools get new leader: Frauenheim now serving in Chicago	Chronicle of Philanthropy – April 29, 2008 Pioneer Press – July 31, 2008
Course Critic: Olympia Fields tends an Open contender South Course gets fierce with a long expansion Chicago Faucet Supports IL Educational Initiative	Crain’s Chicago Business – August 4, 2008 Kitchen & Bath Design News – August, 2008
Keeping College Dreams Alive Program investing \$1M into Parochial education New Scholarship Help for Catholic Students \$1 million in scholarships aim to help needy Catholic school students Public headaches for private schools Administrators scramble to help struggling families meet cost of tuition	NBC 5 News – February 3, 2009 ABC 7 News– February 3, 2009 FOX News– February 3, 2009 Chicago Tribune – February 4, 2009 Chicago Tribune – February 26, 2009

DISTRIBUTION REPORT

	<i>2006-2007</i>	<i>2007-2008</i>	<i>2008-2009</i>	<i>2009-2010(P)</i>
Operating Grants	\$2,446,125	\$2,000,000	\$2,000,000	\$1,800,000
Scholarship	2,947,480	4,487,552	5,264,299	4,567,095
Capital	747,608	560,643	82,141	331,000
Programmatic	1,255,895	2,241,586	2,736,287	1,730,736
Patrons Program	2,096,218	2,530,870	2,684,003	2,686,581
Total	\$9,493,326	11,820,651	12,766,730	\$11,115,412