



## **FAST FACTS**

Independence Mission Schools was founded by a group of entrepreneurial philanthropists amidst the decision by the Archdiocese to close a number of schools in the wake of the Blue Ribbon Commission recommendations. This group of civic leaders approached the Archdiocese with a plan to assume ownership, control, and operation of 15 inner-city Catholic schools under a privately managed non-profit 501(c)(3) organization.

Since its inception, IMS enrollment has grown 24%; IMS schools serve students of all faiths in some of the city's most disadvantage neighborhoods. Nearly 4,800 students strong, IMS schools represent 21% of the total population of Catholic school students in Philadelphia. Our growth is testament to the confidence families have in Catholic education as schools providing high-quality academics in an environment that is safe, structured and emphasizes development of values and character.

In a city where 400,000 people live in poverty, 36% of Independence Mission Schools students live at or below the poverty line — almost double the national average. Our student population is richly diverse and truly reflects the neighborhoods they serve: 78% are non-Catholic, 74% are African American, 10% are Latino, 13% are Asian & Bi-racial, 3% are Caucasian.

Independence Mission Schools' academic strategy starts by acknowledging the many unique challenges students face in an urban environment. Our end goal is to dramatically decrease or eliminate the achievement gap that is pervasive in urban education, while providing education equity for children living in poverty.

Our curriculum emphasizes respect for the diversity of our student population while teaching from a traditional Catholic perspective, Gospel values that are respected by all faiths. Our students receive daily religious instruction that embraces the Archdiocese religious education curriculum, attend mass and participate in Catholic feasts and holidays.

Our unprecedented success is drawing national attention to our unique model which is viewed as a viable option for other cities seeking to preserve the valuable resource of urban Catholic education.

The Archdiocese, which provided start-up grants for the formation of Independence Mission Schools, does not provide ongoing financial support for the operations of the 15 independent elementary schools in the IMS network. As a separate 501(c)(3), IMS and its individual schools are funded by private donations, foundation support and scholarships from the Pennsylvania Scholarship Tax Credit programs.



## **Independence Mission Schools Board of Directors**

### **Anne McGoldrick**

#### **President; Independence Mission Schools**

Anne has put her extensive experience in the financial and technology private sector to work at IMS, first as our founding CFO and now as President. Her prior background leading global teams directly prepared her to bring together our diverse network that reaches every corner of Philadelphia. Anne is a Philadelphia native and proud product of Catholic schools, including the Jesuit university, Boston College, where she received her undergraduate degree.

### **Brian McElwee (Board Chair)**

#### **President; Valley Forge Investment Corporation**

Brian has long been a champion of Catholic education in Philadelphia and, in addition to his role with IMS, serves on the Board of BLOCS, an organization that raises and allocates scholarship funds that allow students to attend Catholic schools. His advocacy in the area of scholarship funding has helped ensure that all families, regardless of income, have access to a high-quality education for their children.

### **Benjamin Auslander**

#### **Senior VP, Private Client Advisor; US Trust**

Ben began his career in investment banking at Salomon Brothers in New York. He currently leads a team of specialists at US Trust, overseeing a multi-disciplinary approach that includes investment, estate planning, banking, and advising on philanthropic legacies. Ben enjoys volunteering with youth soccer and baseball organizations near his home in the suburbs of Philadelphia.

### **James Broussard**

#### **Owner & President; Dynamic Risk Assumption Incorporated**

Jim graduated from the LaSalle College Evening Division with a BA in accounting and CPCU designation in Insurance, after which he launched a successful career in the insurance industry. A service-driven individual, he is a passionate advocate for a number of local organizations including the Girard College Development Fund and the Bethesda Project, which provides support to Philadelphia's homeless.

### **Anthony Cellucci**

#### **Co-Founder & Managing Partner; The Beacon Group of Companies**

Tony cofounded The Beacon Group in 2002 and continues to manage a team that provides advice on insurance, investing, and employee benefits. He grew up in the Overbrook section of West Philadelphia and is a proud graduate of St. Donato's (now St. Frances

Cabrini, an IMS school), Archbishop Carrol High School, and Villanova University. He lives with his wife and two children in Villanova.

**William P. Curtis, Jr.**

**Partner; Porter & Curtis, LLC**

Bill holds a B.S. in Accounting and M.B.A. in Finance from St. Joseph's University as well as a JD from Temple University School of Law. Through his work at Porter & Curtis, Bill and his team provide insurance, claims administration, and risk management information system support. They are known nationally for their work providing these services to Catholic dioceses.

**Jack Donnelly**

**Former CEO; L.F. Driscoll**

Following his graduation from Drexel with a Civil Engineering degree, Jack joined L.F. Driscoll and rose through the ranks, becoming President, CEO, and owner. He sold the company in 2009 and retired in 2014. Jack sits on various Boards including Center City Development Corporation and Moore College of Art and Design, and also serves as Board chair for St. Martin de Porres School, an IMS school.

**John Figge**

**President; JOF Investments**

In addition to his work in finance, John is a franchisee of the Panera Bread Company. John's work and studies led him to positions in Massachusetts and California before settling in the Philadelphia area in 2002. He helped establish a School Board and served as the first Board president of the DePaul Catholic School in Germantown, now an IMS school. He resides in Bryn Mawr with his wife and their four children.

**Bishop Michael J. Fitzgerald**

**Auxiliary to the Archbishop of Philadelphia**

After obtaining a B.A. (Temple), a J.D. (Villanova), and a M.Div (St. Charles Borromeo Seminary), Bishop Fitzgerald was ordained a priest and began his ministry. He later received his J.C.D. (Doctorate in Canon Law) from Georgian University in Rome. In 2010, Bishop Fitzgerald was ordained Auxiliary Bishop of Philadelphia. He is a Fourth Degree Member of the Knights of Columbus and a member of the Equestrian Order of the Holy Sepulchre of Jerusalem.

**Lauralee V. Howley**

**Executive Director; Howley Family Foundation**

Lorie's passion for helping others reach their education dreams began as a benefactor for a single student, which led to helping his entire family to go back to school. Today, as the Executive Director of the Howley Family Foundation, Lorie helps hundreds of students in Ohio and Philadelphia get a transformative school experience.

**Michael S. Jackson**

**Partner, Tax; GrantThornton, LLP**

Mike began his career with Ernst & Young, LLP and has over 20 years of experience in tax compliance, financial planning, and wealth transfer strategies. He is a CPA and co-author of two books – The Tools and Techniques of Income Tax Planning and The Tools and

Techniques of Financial Planning – which are widely used as educational resource material by those in the financial planning profession.

**Br. Richard Kestler, FSC**

**Former President; West Catholic Preparatory HS**

Brother Richard has been a De La Salle Christian Brother for over fifty years, serving the needs of people in various stages of life. He is a native Philadelphian and realized early in his youth that he wanted to be a teacher. After eight years as a full time teacher, Brother Richard served as Principal and eventually President of several area secondary schools – most recently retiring as President of West Catholic Preparatory High School in West Philly.

**Dr. Mary McDonald**

**President; MCD Partners**

Mary is known as the architect of the Jubilee Schools in Memphis. Her education career spans everything from teaching algebra to mentoring school leadership. She shares her incredible insights nationally as a published author, as a host on her “Seize the Day” radio show and as a popular speaker on Catholic identity.

**Richard Nourie**

**Former Principal & Senior VP; Johnson & Higgins**

In addition to his 40-year career in Employee Benefits and Financial Services, Dick has been involved in many philanthropic endeavors throughout his life. For almost 30 years, he served The Leukemia & Lymphoma Society in various capacities, both nationally and locally. Dick also sat on the Boards of several IMS schools including St. Malachy, St. Gabriel, and Our Mother of Sorrows/St. Ignatius.

**Daniel Pickens**

**Partner; BA Securities**

Dan holds a B.S. from Kenyon College, a J.D.D. from Temple University, and an M.B.A. from the Wharton School of the University of Pennsylvania. In addition to his career of more than 20 years in corporate finance, Dan is a member of the Board of both St. Thomas Aquinas and St. Malachy, IMS schools.

**Ken Phelan**

**Chief Risk Officer; US Department of the Treasury**

Ken joined the US Department of the Treasury as its first ever Chief Risk Officer in November of 2014. Prior to this, he served at the Chief Risk Officer for RBS Americas. Ken has more than 20 years of experience across risk management, capital markets and structured products. He holds a J.D. from Villanova, an M.S. from Trinity College in Dublin, and a B.S. from Old Dominion University.

**Michael Rashid**

**Former President and CEO; Amerihealth Caritas**

Michael most recently served as President and CEO of the AmeriHealth Mercy Family of Companies, following 14 years of serving as the company’s Executive Vice President. He earned a Master’s of Business Administration in Finance from the Harvard Business School and a Bachelor of Science degree in Marketing from the University of Southern California.

**Marc Richman****Managing Director, Private Wealth Advisor; Morgan Stanley, Private Wealth Management**

Marc graduated from Clark University with a B.A. in English Literature and earned his M.B.A. from Columbia University. Prior to his work with Morgan Stanley, Marc served as a member of the Private Wealth Management Group of Deutsche Bank. He is a member of the Board of Directors of The Agnes Irwin School and St. Martin de Porres, an IMS school.

**Joseph Stapleton****Partner; Montgomery, McCracken, Walker, & Rhoads, LLP**

After completing both his undergraduate and law studies at Villanova University, Joe clerked for Judge Donald W. Van Arsdale and is now partner and co-chair of the Technology Law Group at Montgomery, McCracken, Walker, & Rhoads. He is a member of the Board of the St. Christopher's Foundation for Children as well as the Board of St. Martin de Porres, an IMS school. Joe is a longtime volunteer at the Children's Hospital of Philadelphia.

**Gerard H. Sweeney****President & CEO; Brandywine Realty Trust**

During his work with Brandywine since the company's founding in 1994, Jerry has overseen the growth of the company from four properties to over 33 million square feet of real estate. He serves as Chairman of the Boards of the Schuylkill River Development Corporation (SRDC) and the Philadelphia Regional Port Authority. Jerry is also co-founder and co-CEO of Bonomo Turkish Taffy LLC.

**Michael Young****Founder; Young Capital & Classic Management Incorporated**

Michael founded Classic Management Inc. in 1982, a residential and commercial property management and development firm of which he serves as CEO. He is a member of various Boards including BLOCS and St. Martin de Porres, an IMS school. Michael and his wife Sue have helped support inner-city students with scholarships to Philadelphia's more prestigious high schools.