

IMPACT REPORT

2021-2022



WHEN YOU DONATE TO BLOCS

YOU DONATE TO

KIDS
LIKE US!

#BUILTBYBLOCS



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TOGETHER WE SIGNIFICANTLY IMPACTED THE LIVES
OF PENNSYLVANIA STUDENTS THIS YEAR.
HERE ARE SOME HIGHLIGHTS:



BUSINESS LEADERSHIP ORGANIZED FOR CATHOLIC SCHOOLS

555 Croton Road, Suite 310 | King of Prussia, PA 19406 | 484-704-2300

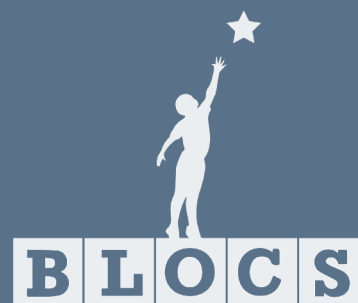
BLOCS.ORG | @BLOCSPhilly

A young man with dark hair, wearing a dark blue zip-up jacket over a white collared shirt and a red and blue striped tie, is smiling and holding a large sign. The sign is divided into four quadrants: top-left is dark blue, top-right is yellow, bottom-left is light blue, and bottom-right is orange. The text on the sign is in a bold, white, sans-serif font with a dark outline. The background is a white wall with repeating logos of a stylized 'G' in blue and red, and a large blue and red lion's head logo.

**Catholic
education
helps me
grow closer
to God**

#BUILTBYBLOCS

OUR MISSION



For more than forty years, Business Leadership Organized for Catholic Schools (BLOCS) has provided educational opportunities for children ages pre-K through 12th grade throughout the Philadelphia five county area and across the state of Pennsylvania.

Viewed as the premier scholarship organization in PA, BLOCS partners with more than 100 Archdiocesan and 300 private Catholic and non-Catholic schools to **provide over 17,000 need-based scholarships annually**.

BLOCS is the **largest scholarship organization in the state** to provide scholarships funded heavily through Pennsylvania's Department of Community and Economic Development's Educational Improvement (EITC) and Opportunity Scholarship Tax Credit (OSTC) Programs.

WHILE WE RAISE CLOSE TO \$70M ANNUALLY FOR FAMILIES IN THE GREATER PHILADELPHIA AREA, THE NEED FOR TUITION ASSISTANCE IS MORE THAN DOUBLE THE CURRENT AMOUNT OF TAX CREDIT SCHOLARSHIPS AVAILABLE.

FROM THE CHAIRMAN & CEO

Dear BLOCS Family,

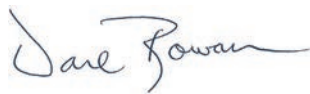
As we reflect on another historic year for BLOCS, we focus on the students whose lives have been transformed for the better. Over the past year, we have had unique opportunities to meet dozens of students who each articulate stories of personal discovery, achievement (often during times of great adversity), and an emphatic sense of gratitude for the benefactors who provide them with the means necessary to learn, grow and realize their dreams.

We look around our city and can't help but be moved by the increased crime, poverty, and violence that our students are exposed to daily. We know the problems cannot be addressed with quick fixes, but we are more assured than ever that investing in education will help to alleviate the problems by creating alternate pathways for opportunity and ultimately success – both in and out of the classroom.

BLOCS works with our school partners in paving the way for more families, of any religion, each year. This past year BLOCS provided tuition-based assistance to over 17,000 families that enabled them to have access to a high quality, values-based education. Having firmly established ourselves as the leaders among scholarship organizations in Philadelphia, we can assure you that, quite simply, *Catholic education works*. We have seen how Catholic schools across the region worked tirelessly to sustain an in-person learning environment for students, thereby stemming the tide of learning loss suffered by the pandemic. We close out the year on a high note – with Catholic schools' enrollment (for both grade and high schools), trending upwards year over year.

This is a critical time for business and community leaders in Philadelphia to step up and let our voices be heard. We are the ones who can become change agents by investing in our students. We have a singular focus – to provide greater opportunities for more families and students. To our donors – we sincerely thank you for the generosity you consistently exhibit year after year. It is our hope that more will join us, in whatever capacity possible, in our never-ending mission to Build a Brighter Future One Child at a Time.

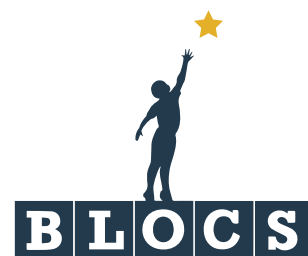
Thank you and God's Blessings,



Matt McFillin
Board Chairman



Dave Rowan
Chief Executive Officer



OUR HISTORY



William S. Fishman

In 1980, Business Leadership Organized for Catholic Schools (BLOCS), announced at a press conference at the Union League of Philadelphia, the start of a financial campaign to aid parochial schools.

The newly formed committee, together with the Archdiocese of Philadelphia tabbed William S. Fishman, (former Chief Executive Officer of ARA Services, now Aramark), as the first Board Chair.

Fishman's motivations to involve himself in the effort were borne from a desire to ensure a qualified labor pool for Philadelphia firms.

The committee was aligned with Fishman's assertions about the correlation between Catholic education, high academic standards, and job readiness. The Archdiocesan schools constituted the eighth largest system at the time in the U.S., and these graduates fueled the city's labor force. The committee acknowledged a fundraising campaign was necessary to keep the city's economy strong for years to come.

MAJOR MILESTONES

- **1980** BLOCS announces start of fundraising committee comprised of city's business leaders to fundraise on behalf of parochial schools.
- **1985** BLOCS earns Presidential Award for private sector initiatives, being cited by the U.S. Secretary of Education William Bennett, as "probably the most successful private sector undertaking in education in the country."
- **2010** Michael G. O'Neill leads BLOCS through transition to official 501(c)(3) nonprofit, operating completely independently from the Archdiocese of Philadelphia.
- **2013** PA passes amendments to House Bill 91 – allowing for formation of Special Purpose Entities (SPE's), which enable individual taxpayers to receive tax credits for their scholarship donations through the Educational Improvement Tax Credit (EITC) and Opportunity Scholarship Tax Credit (OSTC) programs. BLOCS' revenue nearly doubles year over year as a result.
- **2021** BLOCS sets a new tax credit revenue record – more than \$69M in tax credits, capping off yet another five-year growth trend for the company, having raised \$263,978,000 since 2017.

PAST BOARD CHAIRMEN



Matthew Topley
2017-2022



Donald Saleski
2013-2017



Michael G. O'Neill
2007-2013



H.F. (Gerry) Lenfest, Esq.
2005-2007



J. William Mills, III
2002-2005



David F. Girard-diCarlo, Esq.
1999-2001



G. Fred DiBona, Jr. Esq.
1990-1998

WHY CATHOLIC EDUCATION?

Catholic Schools fared better than their peers in stemming the learning loss tide post-pandemic.

Students in fourth and eighth grade saw unprecedented declines nationally in math and significant under performance in reading between 2019 and 2022. The declines affected students in every state and region of the country.

However, Catholic schools, which tended to be quicker to reopen, did not see any declines in fourth grade math or eighth grade reading.

This particularly impacts BLOCS' constituents – students from low-income households, who proved to be more vulnerable to the challenges posed by virtual learning and closed schools.



99%

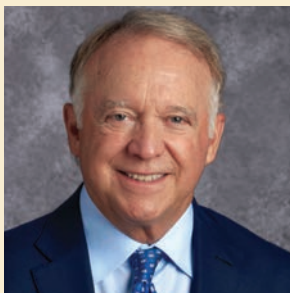
Graduation rate for Philadelphia Catholic schools

vs.

66%

Graduation rate for Philadelphia public schools*

* Philadelphia City School District Report 2021, PublicSchoolReview.com



Tom Lynch '72

President – Conwell-Egan Catholic High School

“The partnership between CEC, our donors and BLOCS is transforming Catholic education in Lower Bucks County. This partnership has enabled CEC to expand our program offering and grow our enrollment 49% over the past three years.”



Fran Walsh '13

BLOCS Recipient – Archbishop Wood High School

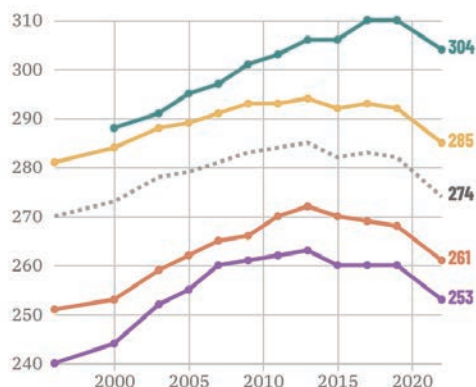
“BLOCS made a tremendous impact on my life by providing a “domino affect,” per se, of opportunities I likely would have never gotten. Because of BLOCS, I was able to attend Archbishop Wood, which then paved the way for me to play football at Villanova University, after which gave me the tools necessary to successfully launch my own company. My educational experiences from Catholic school provided me with the discipline, work ethic, lessons, and role models which have altered the trajectory of my career and ultimately my life. I am not sure where I’d be if not for the opportunity I was given to attend Archbishop Wood.”

Catholic schools did not see any declines in NAEP scores.

NATIONAL NAEP SCORES*

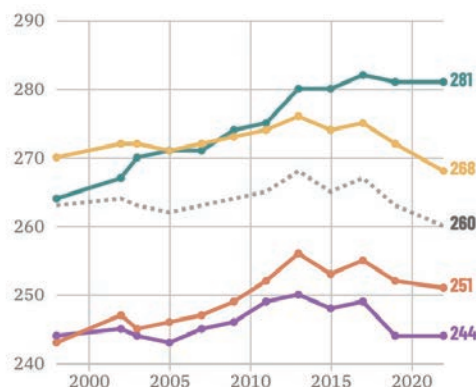
8TH GRADE MATH

■ All students ■ Asian American ■ Black
■ Hispanic or Latino ■ White

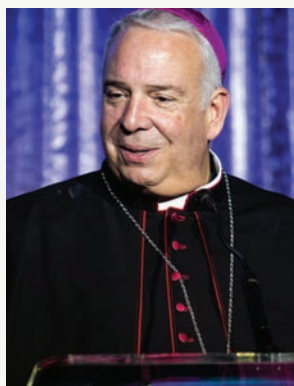


8TH GRADE READING

■ All students ■ Asian American ■ Black
■ Hispanic or Latino ■ White



* Source: www.chalkbeat.org/2022/10/24/23417139/naep-test-scores-pandemic-school-reopening



Most Reverend Nelson J. Pérez, D.D. Archbishop of Philadelphia

“Catholic schools in the Archdiocese of Philadelphia are precious gifts forming servant leaders poised to encounter the world as Missionary Disciples for Jesus Christ. I am deeply grateful to BLOCS for providing tens of thousands of students in our local Church schools with need-based scholarships. Thanks to BLOCS’ dedication and the immense generosity of many donors, low-income families can give their children the gift of a rich Christ-centered education that meets the complex needs of the 21st century learning landscape.”



Cathleen Morgan Parent of BLOCS Recipient at St. Michael the Archangel Catholic School

“Catholic education is important to my family because it provides a sense of security, knowing that my kids come to a place that has structure, discipline and is faith-based. It’s about family. The whole community of people here at St. Mike’s – it’s a really special place.”

WHO WE SERVE

BLOCS partners with schools across the state of Pennsylvania, providing aid through our Mission Contribution funding to those schools having the greatest need, while also providing donors the opportunity to direct their tax credit need-based scholarships to a school of their choice.

We distribute more than 17,000 scholarships to families in PA, however the demand for tuition assistance far outpaces the supply. Through BLOCS' strategic relationships with other scholarship organizations, government entities and our partner schools, we have created a turnkey, efficient business model which exhausts all possible resources to get more money into the hands of the families who need it.

PHILADELPHIA AREA 5-COUNTY CATHOLIC SCHOOLS SUPPORTED BY BLOCS*

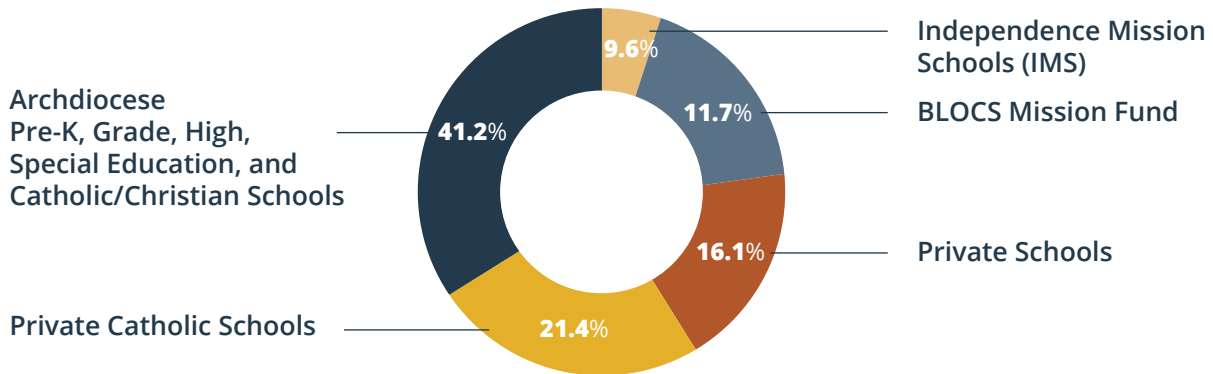
Academy of Notre Dame de Namur	Mater Dei	SS Simon and Jude	St. Jude
Archbishop John Carroll	Maternity BVM	St. Agnes	St. Katharine Drexel
Archbishop Ryan	Mercy Career and Technical	St. Albert the Great	St. Katharine of Siena Wayne
Archbishop Wood	Merion-Mercy	St. Aloysius	St. Katherine Day
Assumption BVM	Monsignor Bonner and Archbishop Prendergast	St. Anastasia	St. Katherine of Siena Philadelphia
Bishop Shanahan	Mother of Devine Grace	St. Andrew Drexel Hill	St. Laurence
Blessed Trinity	Mother of Providence	St. Andrew Newtown	St. Laurentius
Blessed Virgin Mary	Mother Teresa Regional	St. Anselm	St. Lucy
Cardinal John Foley	Mount Saint Joseph	St. Anthony of Padua	St. Luke
Cardinal O'Hara	Nativity of Our Lord	St. Athanasius	St. Malachy
Christ the King	Nazareth Academy	St. Barnabas	St. Margaret
Conshohocken Catholic	Norwood-Fontbonne Academy	St. Bernadette	St. Mark
Conwell-Egan	Notre Dame de Lourdes	St. Catherine of Siena	St. Martha
Corpus Christi	Our Lady of Angels	St. Cecilia	St. Martin de Porres
Cristo Rey Philadelphia	Our Lady of Calvary	St. Charles Borromeo	St. Martin of Tours
Devon Prep	Our Lady of Confidence	St. Christopher	St. Mary Interparochial
Drexel Neumann Academy	Our Lady of Good Counsel	St. Cornelius	St. Mary Magdalen
Father Judge	Our Lady of Grace	St. Dorothy	St. Mary Schwenksville
Gesu	Our Lady of Hope	St. Elizabeth	St. Matthew
Good Shepherd	Our Lady of Mercy	St. Ephrem	St. Max Kolbe
Gwynedd Mercy	Our Lady of Mount Carmel	St. Eufrem	St. Michael the Archangel
Holy Cross Collegeville	Our Lady of Port Richmond	St. Eugene	St. Monica
Holy Cross Philadelphia	Our Lady of the Assumption	St. Frances Cabrini	St. Norbert
Holy Cross Springfield	Our Mother of Consolation	St. Francis de Sales	St. Patrick
Holy Family Aston	Our Mother of Sorrows/ St. Ignatius of Loyola	St. Francis of Assisi Norristown	St. Peter the Apostle
Holy Family Levittown	Pope John Paul II	St. Francis of Assisi Springfield	St. Philip Neri
Holy Family Phoenixville	Presentation BVM	St. Francis Xavier	St. Pio
Holy Ghost Prep	Queen of Angels	St. Genevieve	St. Pius X
Holy Innocents	Resurrection Regional	St. George	St. Raymond of Penafort
Holy Redeemer	Roman Catholic	St. Helena	St. Rose of Lima
Holy Rosary	Sacred Heart Academy	St. Helena Incarnation	St. Teresa of Calcutta
Holy Trinity	Sacred Heart Havertown	St. Hilary of Poitiers	St. Thomas the Apostle
Immaculate Heart of Mary	SS Coleman & John Neumann	St. Hubert	The DePaul Catholic
La Salle Academy	SS Cyril & Philomena	St. Ignatius Antioch	The Regina Academies
LaSalle College High School	SS John Neumann and Maria Goretti	St. Isidore	Villa Joseph Marie
Lansdale Catholic	SS Peter and Paul	St. James	Villa Maria
Liguori Academy	SS Phillip and James	St. Jerome	Visitation BVM Norristown
Little Flower		St. Joseph Downingtown	Visitation BVM Philadelphia
Malvern Prep		St. Joseph's Prep	West Catholic
Mary, Mother the Redeemer		St. Joseph St. Roberts	



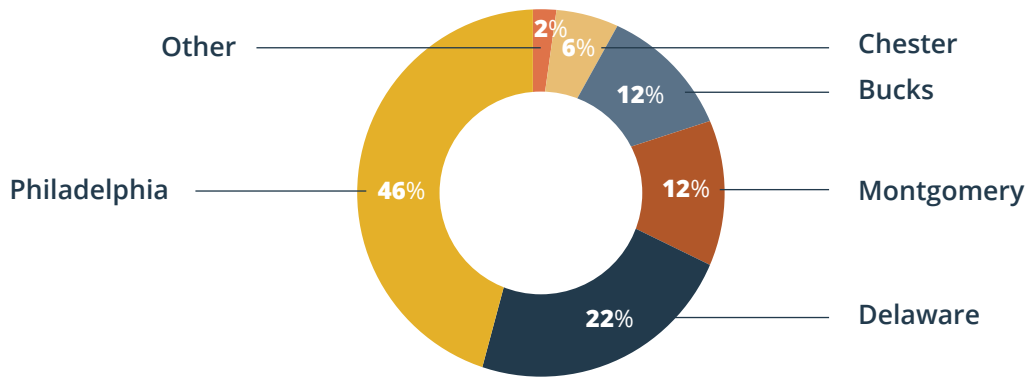
\$55,866

Average household income of BLOCS recipient

SCHOOL CATEGORY



COUNTY DISTRIBUTION



BLOCS STUDENT POPULATION

Archdiocese Schools only

RELIGION:	
73.3%	Catholic
22.0%	Non-Catholic
4.7%	Unknown

BUILT BY BLOCS

The #BuiltByBLOCS storytelling campaign embodies the BLOCS mission at its core.

Being “Built By BLOCS” is a distinction for more than 17,000 students and families across the greater Philadelphia area – one of opportunity, promise and hope.

Our scholarship recipients have been inspired by their Catholic education to go out and set the world on fire. The tools and experiences they receive in the classroom fuel their desire to graduate, and ultimately become community leaders, business owners, attend college, to start a family, and to spearhead their own campaigns to give back.

@BLOCSPhilly on YouTube to view the entire portfolio of stories



@BLOCSPhilly





To date, **BLOCS has showcased nearly 100 students**, through storytelling video and blog posts who have overcome incredible adversities to achieve success. Through each story, we observe a common thread – themes of self-awareness and hearts filled with genuine gratitude for the donors who help turn students’ dreams into reality.

Have you or someone you know benefited from a BLOCS scholarship?
We want to hear your story.

Visit BLOCS.org/BuiltByBLOCS for a chance to be featured and to connect with the #BuiltByBLOCS alumni community.

FINANCIAL INFORMATION

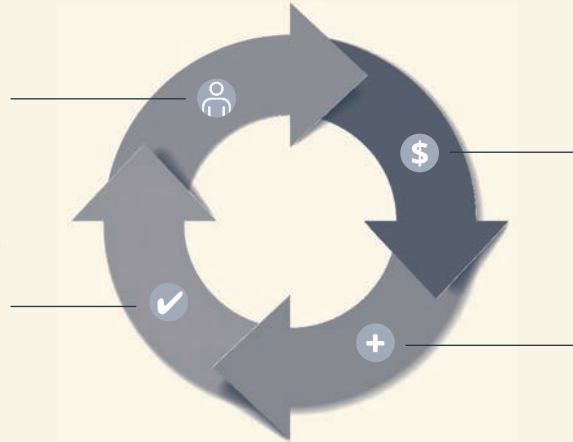
BECOMING A BLOCS LLC DONOR

DONOR

Make a 2-year commitment to a scholarship donation through BLOCS, by redirecting your PA state tax liability.

LEVERAGING YOUR CREDIT

Your tax credit can either be used to fund your year 2 commitment to BLOCS or it can nearly double your annual donation to your designated school.



DONATE

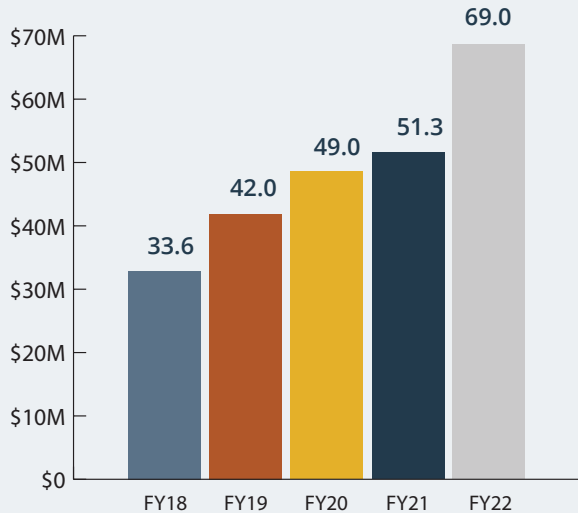
You have 60 days from the time of signing your LLC agreement (or date of LLC's renewal), to write your check to BLOCS. BLOCS disperses the funds to the school of your choice, or to that of greatest need if your gift is undesignated.

CREDIT

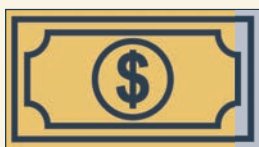
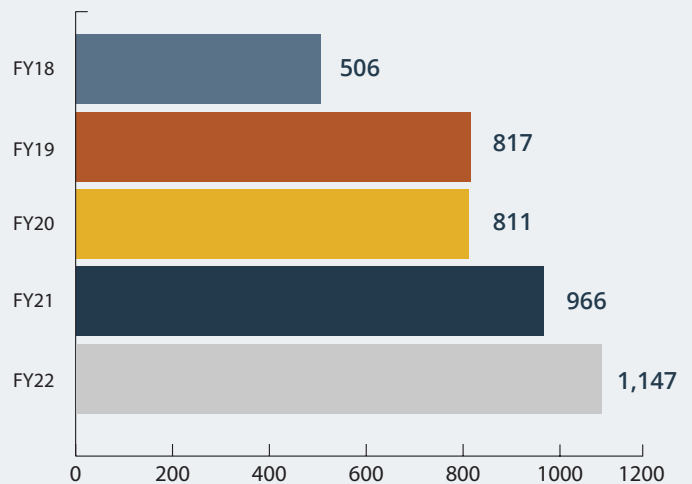
BLOCS provides you a K-1 for your donation, and your 90% tax credit is issued to you by the state.

BLOCS SETS A NEW TAX CREDIT REVENUE RECORD – more than \$69M in tax credits, capping off yet another five-year growth trend for the company, having raised \$263,978,000 since 2017.

TAX CREDIT REVENUE



NUMBER OF DONORS



Operating Efficiency

More than **96¢ of every dollar** donated to BLOCS is distributed directly in the form of need-based scholarships to partner schools for local students and families.



GUIDESTAR PLATINUM SEAL OF TRANSPARENCY

BLOCS has earned the 2022 GuideStar Platinum Seal of Transparency, symbolizing good practice in the social sector. This highest rating indicates that BLOCS shares clear and important information with the public about our goals, strategies, capabilities, achievements, and progress indicators that highlight the difference we make across the state of Pennsylvania.

GIVING TUESDAY



The Archdiocese of Philadelphia, in partnership with The Catholic Foundation of Greater Philadelphia, participated in the #iGiveCatholic Giving Tuesday campaign for the 2nd consecutive year.

For the first time, BLOCS participated in the nationally recognized official Catholic Giving Day, along with 124 schools, parishes and nonprofit organizations across the greater Philadelphia area.

CAMPAIGN FAST FACTS

The Archdiocese of Philadelphia
campaign raised more than

\$1.7M

9,097
donors

BLOCS
campaign raised more than

\$30k

(121% of goal)

131
donors

Finished 10th overall in Archdiocese



Most dollars raised by a Board Member

Don Saleski
\$5,475



BLOCS hosted a “BLOcKs Party” with the students of St. Laurentius school in Fishtown to kickoff the day of giving and use building blocks to spell out what the students were thankful for.

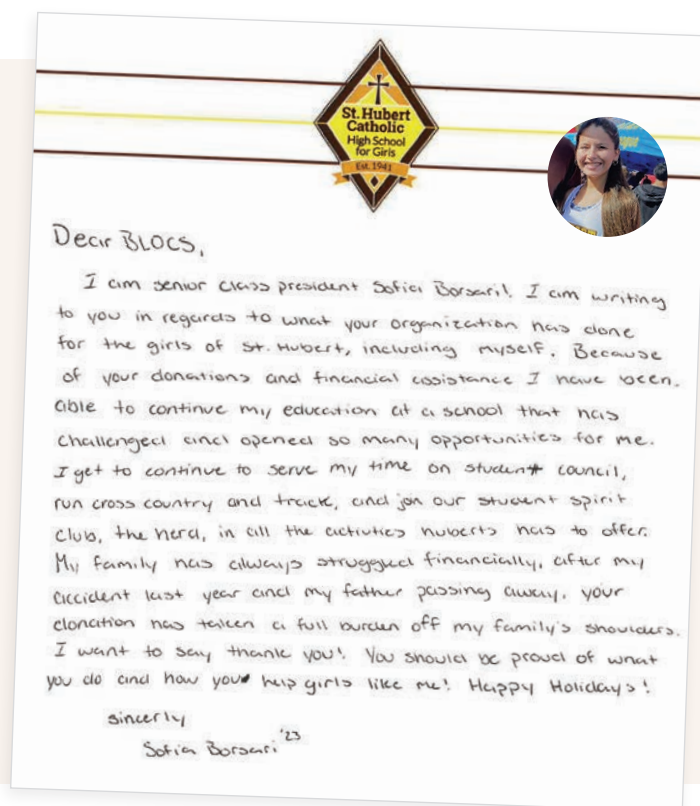
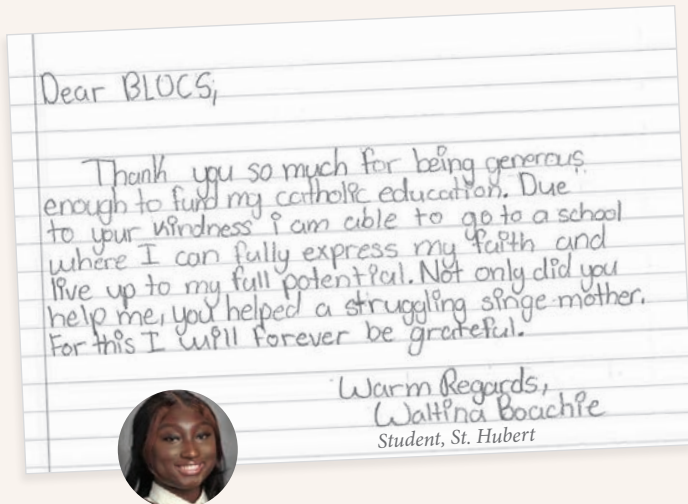


Scan this code to see Action News' coverage of this event

DONOR IMPACT

BLOCS' continued fundraising success is not possible without YOU – our donors.

Thank you for your generosity in creating even more pathways to success for students, year after year.



Brian & Barbara Riley BLOCS Donors

"We recognize the importance of supporting Catholic education and the profound impact it has on the lives of children. More families in the Philadelphia area are recognizing the value of a Catholic education and we want to help foster the growth of Catholic schools. We are so grateful that our gift will give families confidence to continue their Catholic education journey. Working alongside BLOCS and with Bishop Fitzgerald's leadership, our talented Catholic school teachers will be able to provide an excellent education for deserving students from Pre-K to high school across the greater Philadelphia region. We would like to thank the Archdiocese of Philadelphia, BLOCS and our Catholic school teachers and administrators for giving us the opportunity to partner with them."

WE ARE GRATEFUL TO OUR CORPORATE DONORS:



Karen Gilmer-Pauciello

**EVP &
Chief Financial Officer**

**Philadelphia Insurance
Companies**

BLOCS Donors

“BLOCS delivers a true partnership that helps Philadelphia Insurance Companies provide local students with greater access to high-quality education.”

We’re able to streamline and maximize our EITC giving through BLOCS to multiple local schools and education programs.”

ANNUAL GALA

After two years of event cancellations, the **BLOCS “Aspire to Dream” Annual fundraising gala** returned on May 5, 2022 hosted at the Tork Club of Lincoln Financial Field.

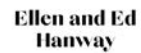
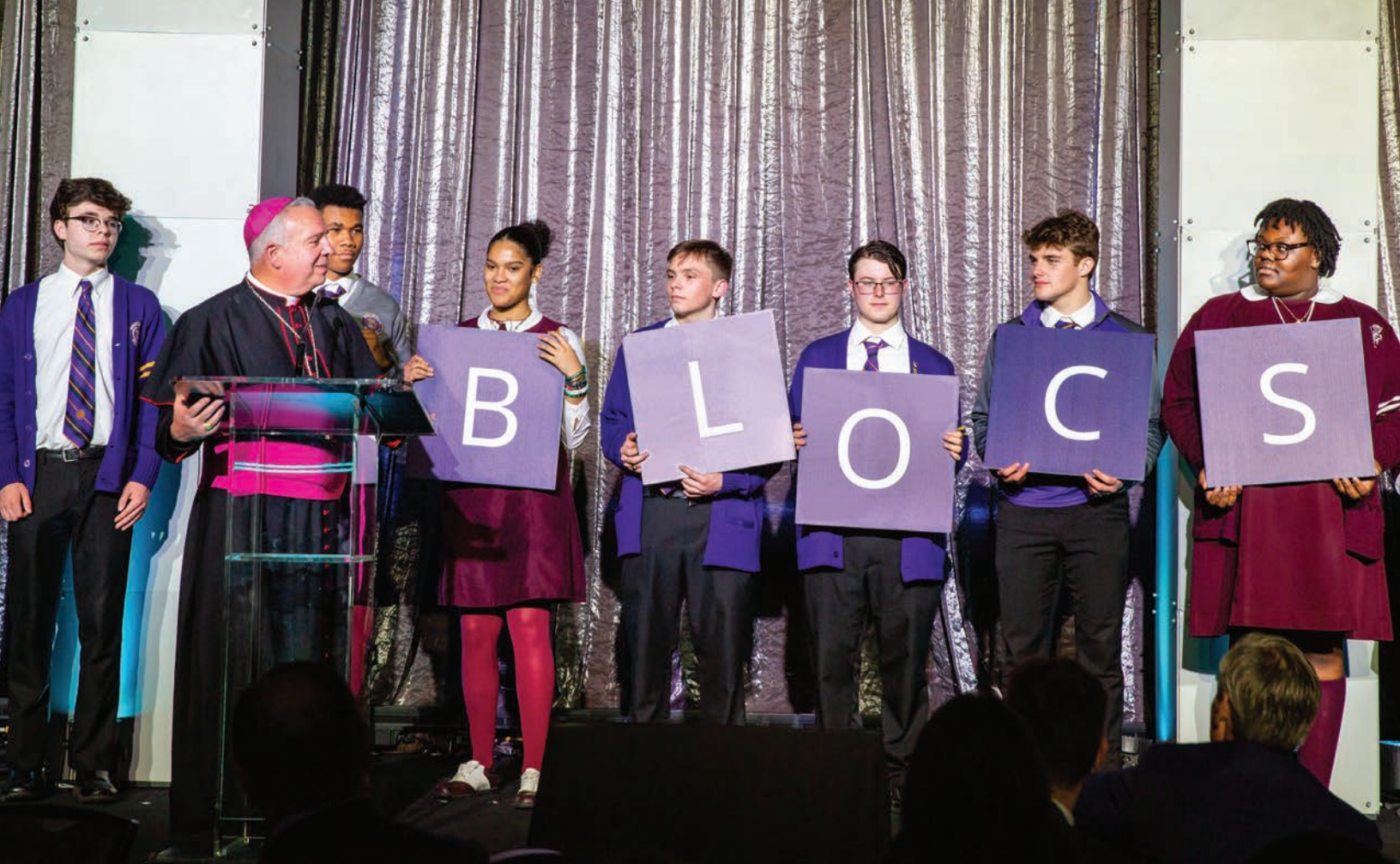
Nearly 500 donors, students and administrators gathered with BLOCS to celebrate a year of **success**. Thanks to the generosity of our donors, BLOCS helped advance opportunity for students in the greater Philadelphia region and capped off an historic fundraising year in tax credit revenue.

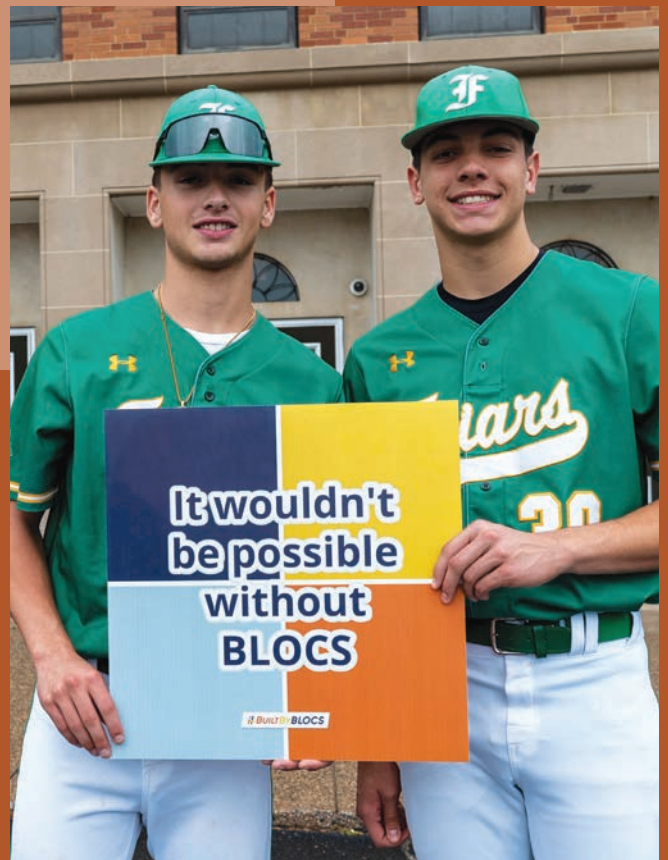
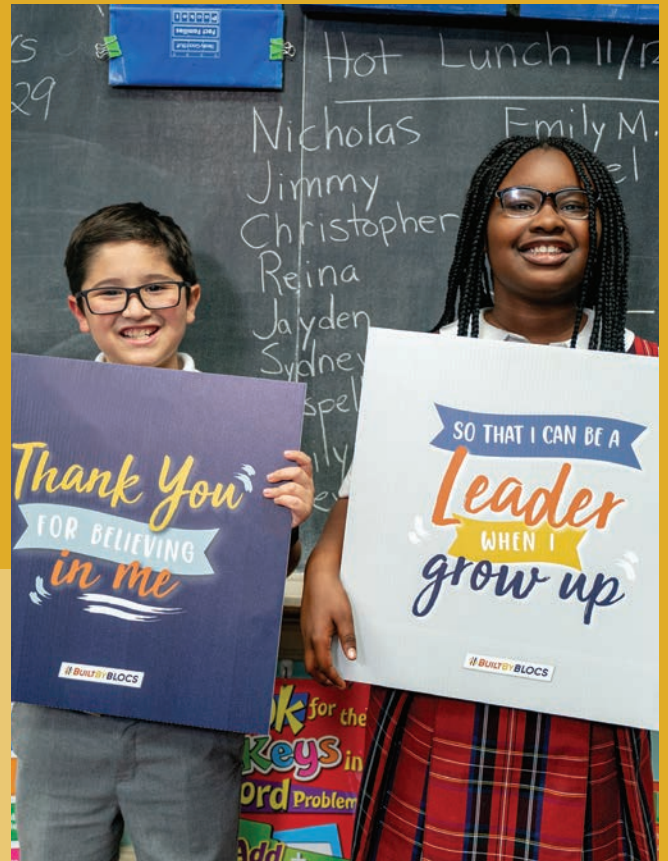
Archbishop Nelson J. Pérez addressed the group with a message of why Catholic education is so critical in building the city’s future and 6abc Action News Anchor **Brian Taff** emceed the show, sharing his own story of an upbringing impacted by Catholic education.



BLOCS honored Ed Snider Youth Hockey Board Chair, Bill Whitmore for his tireless efforts, in working together with BLOCS to fund scholarships for students in Philadelphia.







WAYS TO GIVE

Corporations and individuals can **help us fulfill our mission** to provide families seeking private or faith-based education access to these schools as a safe alternative to public schools in a variety of ways.

While there are **many giving options to choose from** today; your age, income and overall legacy goals may dictate which gifts options are best. As always, consult a tax advisor to determine which of the following or combination of the following best fit your needs.

TAX CREDIT PROGRAM

Through the establishment of **Educational Improvement Tax Credit (EITC)** and **Opportunity Scholarship Tax Credit (OSTC)** programs, donors can receive up to a 90% tax credit against their Pennsylvania state tax liability by making their gift through BLOCS.

An individual or company who wishes to take advantage of this tax credit program, may become a member of a BLOCS Scholarship LLC. These special purpose entities (or SPE's) are the only financial vehicle available for individuals (or companies who do not have direct tax credit approval) to realize tax credits in return for scholarship donations.

To join, an individual or company makes a 2-year commitment, (minimum of \$5,000 per year), to fund the LLC. The LLC will then receive tax credits equal to 90% of the donation amount.

OUTRIGHT CASH GIVING

You can see your generosity in action and will also receive a federal income tax charitable deduction.

GIFTS OF APPRECIATED SECURITIES & MUTUAL FUNDS

Making a gift of securities or mutual funds that have increased in value and have been held for more than one year offers you the chance to support BLOCS' mission. A donation of appreciated securities or mutual funds can reduce or even eliminate federal capital gains taxes on the transfer. In addition, you may be entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer.

PLANNED GIVING

- Bequests of Wills and Estates
- Beneficiary Designations
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts



BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

Matt McFillin

KPMG Philadelphia
Board Chairman

Charlie Bernier

ECBM

Gary DeVito

Zarwin, Baum, DeVito, Kaplan,
Schaer, Toddy, P.C.

Brian Gallagher

GMS Surgent

Brian McElwee

Valley Forge Investment
Corporation

Don Saleski

Acentus/Kemberton

Michael Savage

PTR Baler & Compactor

Tom Shoemaker

Cristo Rey Philadelphia
High School

Bill Streich

Holt Logistics Corporation,
Retired

Dorae Sudell

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Matt Topley

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Retired

Michael Young

Young Capital

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Sanders LLP

Most Rev. Michael J. Fitzgerald

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Archdiocese of Philadelphia

Sean Flynn

FlynnO'Hara Uniforms

Brian Hannan

PwC

Ed Hanway

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Retired

Kristin Hillsley

Foley Hillsley Group

Bill Larkin

Lopez, Teodosio & Larkin

Paul Leary

Cozen O'Connor

Raman Mahadevan

Ernst & Young

John McDonald

PECO - An Exelon Company
Retired

John McGonigal, Jr.

Marcum

J. Justin O'Malley

J.P. Morgan Securities

Michael O'Mara

Stradley Ronon

Archbishop Nelson J. Pérez

Archdiocese of Philadelphia

Mike Prendergast

Capital One, Commercial
Banking PA/NJ/DE

Jack Reick

AON

Brian Vesey

PNC Bank

STAFF

BLOCS STAFF

Dave Rowan
Chief Executive Officer

Ted Aicher
Chief Financial Officer

Kathleen Harvey
Controller

Jim Downey
Development Manager

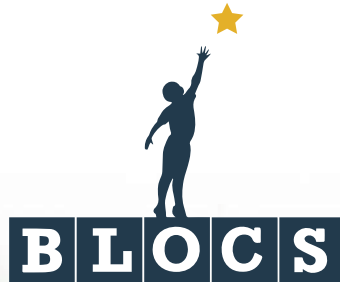
Jeff Gibson
Development Manager

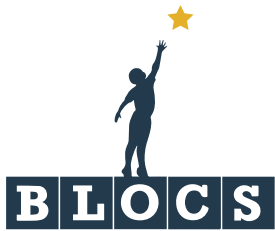
Katie Rose Thornton
Director, Marketing &
Communications

Mike Godown
Senior Staff Accountant

Kristi Terezi
Business Development
Administrator

Laura Scheuerle
Administrative Assistant





**BUSINESS LEADERSHIP ORGANIZED
FOR CATHOLIC SCHOOLS**

555 Croton Road, Suite 310
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