



To: Development Committee
From: Anders Peterson
Date: 11/18/24
Re: November 20th Meeting

<u>Objectives</u>	<u>Purpose</u>
I. Approval of September meeting minutes (2 min)	Committee approves minutes
II. BP Mission (8 min)	Highlight BP living the mission day to day
III. FY25 Progress YTD (10 min)	Committee is informed
IV. FY25 Activities toward goal (20 min) Action Items: <ul style="list-style-type: none">● Annual Report● Alumni Networking Event● Toast sponsors	Committee discusses
V. Foundations / Funding Priorities (15 min) Action Items: <ul style="list-style-type: none">● Connecting on Foundations; sourcing library/travel interest.	Committee discusses
VI. Other Business (3 min)	FY25 Dates: 1/22, 3/12, 5/28

I. **September Meeting Minutes** (p. 13)

II. **Mission Moment: Increased college and career trips for all grades!**

This year Boston Prep is committed to increasing the amount of college and career trips students attend each year. We are excited to announce that we have increased the amount of trips to 2 or 3 per year.

Wellesley Trip: Last month 11th and 12th grade students attended a career trip at the Wellesley College Neuroscience Department. These students expressed an interest in psychology or neuroscience and were recommended based on their current intended college major. They heard from current Wellesley undergraduates and faculty about the research they are doing in the labs on campus. They even got to participate in a hands-on dissection of a sheep's brain!





III. FY25 Progress

Group	FY25 Goal	FY25 Progress YTD	FY24 Goal	FY24 Progress YTD	FY24 Final	FY23 Final
Individuals	\$600,000	\$354,210	\$640,000	\$321,250	\$505,315	\$593,093
Toast	\$500,000	\$21,500	\$500,000	\$20,000	\$465,685	\$406,922
Foundations	\$400,000	\$295,000	\$360,000	\$170,000	\$336,000	\$501,000
Grand Total	\$1,500,000	\$670,710	\$1,500,000	\$511,250	\$1,307,000	\$1,501,015

- Committed multi-year gifts— FY25: \$475,000; FY26: \$390,000.
- We are at 45% (\$670,710) of FY25 Goal YTD, compared to 34% (\$511,250) in FY24 YTD.
- We anticipate between now and the end of the calendar year that we will receive:
 - \$86,000 Charles Hayden grant
 - \$100,000+ early Toast commitments
 - \$60,000+ Annual Report/end of year giving

IV. FY25 Activities Toward Goal – Where we need your help now!

There are several engagement areas where we need your ideas and outreach between now and our January meeting.

Event	Timing	Key Dev Comm. Personnel	Notes
Board of Visitors	11/1	School Team, Dev Comm., Foundation	Our best attended Board of Visitors meeting to date!
Individual Meetings	Ongoing		
House Party	Early winter	Tom Huff, School Team	TBD
House Party	Winter - January or February weekday night	Hosted by Kim and Mayeti	Shared hosting of event
Bain Cap brown bag	January 27, 28, or 29	David R., Andrew K., School Team, Bill	To be hosted by David Russell
Career Network. Event	Jan. 9	School team	See below for more info
The Toast	April 4, 2025 at AFH	Toast Comm.	Review Sponsor List



IMMEDIATE ACTION ITEMS

Annual Report Mailing - November

We are sending out 300+ reports highlighting last year at Boston Prep and our celebration of 20 years. We are including individualized notes for the mailing. Thank you to those who have taken a big chunk of notes already!

Career Networking Event - January 9th, 6pm

Building on the successful return of the Career Networking Event in 2024, this year we will again offer a career panel and mock interview opportunities. We'd like to expand the mock interview section of the program. ***Who do you know who would be interested in conducting low-pressure 5 minute interviews with students and alumni?*** Our panels will include business, tech, health care, and professional services focus areas. ***Do you know anyone who would be a good candidate to add?*** See Appendix below with 2024 list of attendees.

Toast - Sponsorship Review

In the Appendix below, see the list of new sponsor leads for FY25 on page 6. ***Please share any connections you have to these companies. Please also share additional sponsor ideas to grow this list.***

IV. Foundations

11/20/24 Update: \$400,000 Goal

- \$295,000 Received
- \$137,000 Anticipated

Confirmed Foundations	Amount Received/Pledged	Notes
Wellington	\$60,000	Year 10 of 10 year grant, held wellington visit and communicating about where to go from here
Liberty Mutual	\$25,000	In 2nd year of 2 year grant, looking to solidify a way forward
Mildred Dream Foundation	\$10,000	New Grant through LJ connection
Mifflin	\$15,000	Old Friend of BP, looking to solidify a relationship moving forward
Clowes	\$20,000	Year 1 of 2 year grant
Barr	\$130,000	Year 1 of 3 year grant
Shattuck	\$10,000	
One8	\$25,000	
Total Received	\$295,000	

Expected Foundations	Amount Anticipated	Notes
HPB Foundation	\$25,000	LJ will reconnect in new year
Paul and Edith Babson Foundation	\$10,000	LJ will reconnect in new year
Susan & Donald Babson Foundation	\$6,000	LJ will reconnect in new year
Hamilton	\$10,000	Will apply again this month
Charles Hayden	\$86,000	Will apply again this month
Total	\$137,000	

Researching Foundations	Notes
Martin Richard Foundation	Supports Boston Charter Schools, can submit introduction online but need a connection
Highland Street Foundations	Can submit LOI, but need connection
Yawkey	Small Capital Grants for education in the spring
NewSchools	Grants to support Special Education and hiring qualified staff, partnering with HR
One8/OpenSciEd	Partnering with Tori Riley & Caitie O'Dell to receive funding for OpenSciEd curriculum (Sharon Liszanzkie runs the program)

Funding Priorities:

- **Library/Literacy:**

- Our goal is to create an inclusive space where every student can access diverse materials and develop the literacy skills crucial for their success in school and beyond. Our dedicated librarian, Tori Crossman— who is currently pursuing her graduate degree in youth librarianship— is leading this initiative that aims to provide equitable access to books and resources, promote independent learning, and more.
- So far, we have purchased 500+ new books that have been barcoded, labeled, digitally cataloged, and are waiting to be shelved. And we plan to add A LOT more!
- \$100,000 helps us sustain the library's growth over the next 5 years



- **Student Travel & Experiences:**

- Junior Year Spain Trip
- 8th Grade New York Trip
- Wishlist Items:
 - HBCU College Tour & Overnight Stay
 - DC Trip for 9th and 10th graders
 - Additional summer/winter enrichment opportunities: MIT Program, journalism program, etc.
- FY25 Student international travel: \$150,000; field trips: \$35,000



Foundation/ Funding Priorities Ask:

- *Foundations: connect with Lily if have any connections to these foundations or their board members*
- *Funding Priorities: Who in your network would be interested in supporting these initiatives? Corporations, families & individuals, etc.*

Appendix:

FY24 Career Networking Event Attendees

Name	Company & title
Yvenson Louis	Assistant Project Engineer Apprentice - Dimeo Construction
Brandon	Youthbuild
Maureen Bryan	MFS
Jock Payten	Nubian
David Russell	Bain Capital
Tatiana Mendez	Deloitte
Matt Graham	Rapid Dev
Ken Rys	
Arius Thomas	IT Security Engineer
Kate Russell	Workday
Karan Sharma	Boston Bioproducts
Thaina Vilson	Nurse
Mareshia Donald	Vertex
Tom Sorbo	
Lynn Regan	
Peter Shively	Bain & Co. Partner



Name	Company & title
Yvenson Louis	Assistant Project Engineer Apprentice - Dimeo Construction
Jamie Buell	Moderna
Israel Bracho	Suffolk Sheriff's Dept
Tom Huff	
Justin Thomas	MFS
Heidi Barry	MFS
Jesse Setaro	North End Fitness
Wismy Michel	security / tech
Mark Siedner	doctor
Sid Palas	float
John Grandin	

** highlight denotes alumni

**Appendix:
2025 Toast Sponsors List**

Name	Refer	Notes	2024 Amount
<i>Total</i>			\$170,750
<i>Subtotal on Individuals</i>		Individuals	\$42,500
Insource	AP		2,500
Arimann	AP		2,500
Ropes & Gray	Andrew		\$10,000
KPMG	Andrew		\$10,000
MFS	AP		\$35,000
K & E	Andrew		\$25,000
HR Knowledge	AP		\$2,500
Deloitte	David Russell		\$10,000
PWC	Andrew		\$10,000
Citizens	AP		\$10,000
Shoreline Aviation	Steve S.		\$2,500



Blue Cross	AP		\$2,500
Mitsubishi	BC		\$2,500
Local Motion	AP		\$250
Krokidas	AP		\$500
Don & Pam Peterson	AP		\$2,500
Top Leads in '25			
Butcher Box	JB	AP to pursue	
TJX	LB		
Goulston Storrs	AP	Peter Kaplan	
State Street	LB		
Converse / Nike	LB	LB, KB, CN connections	
Puma	PM	Pivel M connection mentioned during 10/29 toast committee	
Eastern Bank	LB		
Thermofisher	LB		
BIDMC	LB		
Liberty Mutual F.	LB	event sponsorship	
Morgan Stanley	LJ; Matt O'Keefe		
Barclays	David Russell	unlikely	
JP Morgan	David Russell	unlikely	
AAF CPAs	AP		
Barton Gilman	LB		
Triple Tree	DR	Connection through David Russell, mentioned during 10/29 toast committee	
Workday	DR	Kate Russell Work place	
Top Leads from '24			



Fresh Picks	AP		
Commonwealth Fin.	Priscilla		
Red Sox Found.	AP		
Alliance Bernstein	AP		
Vertex	Arivee		
Moderna	Joel Del Valle / Anders	asked	
PJT	David Russell	followed 2/28; unlikely	
Dominican Consulate	PG	followed 2/16; 2/28	
Marcia Kim-Jackson	Wyatt Jackson	various	
Boston Foundation	LJ	Ask made	
Fidelity Investments	LJ- online portal	Dec Ask	
Antons Cleaners	LJ	Jan Ask to , decline havent been able to since before covid	
Triumph	LJ	Ask Made 1/31	
Sunbelt Staffing	AP	outreach 1/26	
PN Transport	AP	outreach 1/26	
Nellie Mae Foundation	LJ	outreach 1/29	
The HYM Investment Group	LJ- Charles Myers	Dec Ask Submitted, decline will stay involved for next year	
Dellbrook	LJ	Dec Ask Submitted	
Work Day	David Russell		
Flock Boston	LJ- Chris Hussey	Dec Ask Sent	
PNC	Online portal for	Dec Ask Submitted	



	sponsors hips		
Past Leads			
Biogen			
Lee Kennedy Company			
Lawson & Weitzen, LLP			
campusSIMs			
Herb Chambers	AP		
Avanade			
Fitch Law Partners			
State Street Bank	AP		
Tootsie Roll Incorporated			
Sansome Partners			
National Grid			
Cramer			
Timberland			
Dunkin			
GE			
New Balance			
Toth + Co.			
Google			
Suffolk Construction			
Reebok			
Pfizer			
Annkissam			
Cove Hill	Andrew		
Alnylam	AP		
McCarter & English	AP		



Mintz Levin	Kim Borchert		
Prio Wealth	AP	FY24	
Charlesgate Realty	Henning		
North Shore Elder & Estate	Mike Stankavish		
Berkshire Bank	Priscilla		
LEK	Andrew		
Plymouth Rock	Carolyn Osteen		
Gordon Cromwell	AP for ideas		
Planet Fitness	AP		
Target	Kim Borchert		
US Bank	Kim Borchert	(Kai Sakstrup)	
Indigo	Kim Borchert		
Avalon Bay	Kim Borchert		
NE Revolution	Kim Borchert		
Wayfair	Kim Borchert		
Neal Reenan	AP		
Rockland Trust			
The Commonwealth Fund			
Hanover Insurance Company			
Converse			
Skillsoft			
Alexion			

American Tower			
Adage Capital Management			
iRobot			
Welch's			
Raytheon			
Boston Harbor Hotel	Jewel		
Encore Boston			
47			
Shaws			
Quirk			
WB Mason	AP		
Stone & Webster			
Work Day	David Russell		
Natixis Investment Managers			

Appendix:
Development Committee Scope & Sequence FY25

<i>Month</i>	<i>Development Committee</i>
September 9/11	<ul style="list-style-type: none"> • Review pipeline & Confirm FY25 goal • Discuss strategy & first quarter calendar • Review FY25 narrative
November 11/20	<ul style="list-style-type: none"> • Review FY25 progress • Annual report prep • Foundation deep dive / Re-launch of Young Professionals • Toast sponsor brainstorm • Alumni Networking event prep
January 1/22	<ul style="list-style-type: none"> • Review FY25 progress re: end of calendar year • Evaluate progress of new additions and fall meetings/events • Enlist Committee help for key Toast inputs • Career Networking Event follow up



March 3/12	<ul style="list-style-type: none">• Review 3rd quarter progress• Final Toast plans and Toast follow up plan
May 5/28	<ul style="list-style-type: none">• Actions to close out FY25• Debrief FY25• Plan for FY26 - strategy and goals

Appendix:
FY25 Strategies

- Expand our pipeline: add new donors and prospects with strong giving capacity (Top Priority)
- Engage our stakeholders in new and different ways to reflect the growth past disruptions of the past four years
- Level up existing donors where possible

FY25 Activities by Focus Area

- Individuals
 - Bring back successful BOV (October) and Alumni Career (January) events; add additional high impact small events (one fall, one winter)
 - Add a new member to the Committee (tbd)
 - Leverage for growth recent new networks of Committee members and other team members
 - Create connection with ED and high net worth donors and prospects through individual touch points
 - Re-imagine and restart Young Professionals Group (YP4BP)
 - Create plan for strategic attendance at events in community to broaden network
- Toast
 - Add members to Committee
 - Continue to add new sponsors via research, referrals, and new connections
 - Capitalize on energy of 2024 with all stakeholders & create strong theme and program
 - Event Date: April 4, 2025
- Foundations
 - Reconnect with Foundations that previously supported Boston Prep during the founding years: Amelia Peabody Foundation, Mifflin Foundation, Klarman Foundation
 - Next Phase of Barr Foundation: submitting Portrait of a Graduate Proposal on June 11th (Range 3 years \$200,000-\$600,000).
 - Bring in at least 3 new Foundations: Clowes, Balfour, Mildred Dream Foundation, Etc.
 - Capital Projects: identify foundation that fits for the parking lot capital project.
 - Find new and creative ways to engage with current foundations to secure future funding, such as volunteer days, career days, and more.



- Getting the story of Boston Prep out there:
 - Overlay strong communications that tell the stories of those closest to the work
 - Identify what the hook is for different potential donors and get our people there: identify where Meekerley needs to show up, where will we tell the story of the Ethics working group,
 - Provide a clear narrative and engaging initiatives to support
 - College Prep Academics, underscored by Literacy push
 - Persistence, emphasizing program's multiple value adds
 - Ethics and Culture, including return of Ethics curriculum, int'l travel, social emotional supports
 - Continue to improve systems and communications to stakeholders

Appendix:

Minutes from September 11, 2024 Meeting

- I. The Committee voted to approve the June meeting minutes.
- II. The Committee voted to approve the FY25 goal of \$1,500,000 for the annual fund, and discussed FY25 Progress.
- III. The Committee discussed the proposed activities and calendar for FY25.
- IV. The Committee provided feedback on the FY25 narrative document.

Members on call: Anders Peterson, Lily Jewell, Lauren Bardsley, Meekerley Sanon, Claire Newton, Amelia Cheers, Bill Clark, John Grandin, Tom Huff, Kim Borchert.

Meeting minutes by Anders Peterson.