



PRESIDENT'S CIRCLE DINNER 2024



PRESIDENT'S CIRCLE 2024

Monday, April 29, 2024

Order of the Evening

7:00 PM

Welcome & Prayer

Jon Piot

Chair, Ursuline Academy Board of Trustees

Sister Lois Castillon, O.S.U.

Prioress, Ursuline Sisters of Dallas

Dinner



Presenting the 2024 President's Awards

Gretchen Kane

Bob Galecke

John Grimes Jr.

Win Bell

Tom Merkel

Jon Piot

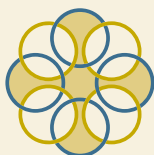


The Roast



The Toast

Dr. Andrea Shurley



THE
PRESIDENT'S CIRCLE

"The stuff that
dreams are made of."

- Detective Sam Spade,
The Maltese Falcon



Over these past 12 years, that's truly what
Ursuline Academy of Dallas has been for me.

Those who know me well know I love the movies. In *The Maltese Falcon*, these compelling words spoken by Humphrey Bogart as Sam Spade captured the allure of an elusive and priceless statue.

For all of us, the pursuit of our dreams can be both captivating and elusive, taking us down unexpected paths, testing our mettle, strengthening our resolve. The ultimate joy of reaching a goal is even greater when the journey has required and received the best of us.

Tonight, we gather to toast, roast, and celebrate the many forms of leadership that have been essential to the success of Ursuline's remarkable journey over the past 12 years.

First and foremost, we thank you, our most generous donors, for your invaluable support that has made all things possible at Ursuline. None of our community's incredible accomplishments could have been achieved without your *Serviam* spirit and commitment to our mission.

This evening, we will also honor five amazing volunteer leaders who have served as chairs of the Ursuline Academy Board of Trustees during my tenure as President. Each has been a mentor, an inspiration, and a guiding source of strength in navigating these extraordinary times.

Thank you for your trust, your partnership, and for believing in our dreams for Ursuline education and its vision for the young women we serve.



Gratefully,

GRETCHEN Z. KANE
President

THE 2024 PRESIDENT'S AWARD



Bob Galecke

Bob Galecke is a compassionate and thoughtful leader and astute businessman who knows how to get things done. His highly energized support for Ursuline, the broader Dallas Catholic community, and important civic endeavors continues to inspire others in like-minded service.

Prior to his retirement in 2016, Bob served in a variety of roles over 20 years in administration at University of Dallas (UD) including Executive Vice President and twice as Interim President. Prior to joining UD, he had served as Chairman, COO, or CEO of four public companies in the Real Estate, Finance, and Health Care industries.

At Ursuline Academy, Bob was a member of the Board of Trustees from 2006-2011 and served as Board Chair from 2011-2013. From 2000-2016 he served as Director for both the Irving/Las Colinas Convention and Visitors Bureau and Irving/Las Colinas Chamber of Commerce. He has held the position of President of Irving Flood Control District 1 since 2010 and was active in Rotary Club from 1992-2015. He is a current member of Holy Trinity Parish and a past member of St. Rita and its Parish Council.

A native of Wisconsin, Bob and his wife Jackie were married 51 years. They moved to Dallas in 1984, bringing their family of three children including daughters Elizabeth '88 and Tricia '90 who both attended Ursuline. Since retiring, Bob divides his time between his homes in Dallas and beautiful Sister Bay, Wisconsin.

In 2016, University of Dallas renamed its annual golf fundraiser in honor of the tournament's founder, Bob Galecke. Proceeds from the Galecke Open support the university's greatest needs for student scholarships and faculty research and enrichment.



THE 2024 PRESIDENT'S AWARD



John Grimes Jr.

John Grimes Jr., Board Chair from 2013-2015, has provided energetic leadership for achieving major milestones at Ursuline Academy, including opening of the Sister Margaret Ann Moser, O.S.U, Athletic Field, a highly successful principal search process, and the launch of a landmark strategic roadmap.

During his Board tenure, John also guided Ursuline through the purchase of its Walnut Hill Lane property from the Ursuline Sisters, which in time will allow the Board of Trustees to become a completely independent governing authority for the school. His generosity of service to support excellence in education continues today through his role as Chair of the Ursuline Education Foundation (UEF) and as a board member of The Lamplighter School.

John is Executive Vice President for DuraTech Processes, an industrial services business.

Previously, he was owner/operator of Attics to Basements Estate Sales, a leading estate sale management company in North Texas. He also currently serves as Senior Advisor at Kroll, formerly Duff & Phelps, where he was a managing director in that firm's corporate finance practice from 2011 to 2017.

John graduated from Georgetown University with a degree in accounting and earned his MBA in Finance and Economics from the University of Chicago.

John is married to Michelle Staubach Grimes, Ursuline Class of 1986. They are members of St. Rita Parish. John and Michelle are the parents of one boy, Jeffrey, Jesuit '17, and two girls who attended Ursuline, Gracie '19 and Emma '21.



THE 2024 PRESIDENT'S AWARD



Win Bell

Win Bell is Chief Executive Officer of Ed Bell Investments, Inc., Ed Bell Construction Company and Construction Equipment Parts Inc. He is a current member of the Ursuline Academy Board of Trustees and serves on the Finance Committee of the Board. As Board Chair from 2015-2018, he led the most recent campus master planning process and was a visionary for successfully aligning the final plan with Ursuline's feasibility study results.

As Owner's Rep for Ursuline, Win has overseen all of the Academy's major building projects, beginning with Campus Renewal and construction of The French Family Science, Math, and Technology Center (2008-2010), followed by the Sister Margaret Ann Moser, O.S.U, Athletic Field (2014), and most recently, the addition of the transformative East Campus and facilities renovations funded by *The Campaign for Ursuline: Act, Move, Believe*.

Win's current volunteer leadership extends broadly to other schools and Catholic institutions in the community including: Bishop Lynch High School (Board of Directors, Finance, Facilities, Owner's Rep); Collin County Regional Catholic School (Owner's Rep); Cristo Rey (Board of Trustees, Owner's Rep); Holy Trinity Seminary (Board of Directors, Facilities, Owner's Rep); Jesuit College Prep (Board of Trustees Chair, Facilities, Real Estate, Owner's Rep); Notre Dame School (Board of Trustees, Facilities, Owner's Rep); Our Lady of Perpetual Help (Board of Trustees, Facilities, Owner's Rep); Shelton School (Board of Trustees, Capital Campaign Chair, Owner's Rep); St. Michael (Religious Formation Building Owner's Rep); St. Rita (School Expansion Owner's Rep); and University of Dallas (Board of Trustees, Finance, Governance, Executive, Owner's Rep).

Win Bell graduated from Vanderbilt University with a BS in Computer Science, Electrical Engineering, and Math. He earned his MS in Computer Science at Purdue University.

Win and his wife, Lynn Feather Bell, Ursuline Class of 1982, will serve as co-chairs of the Catholic Charities Bishop's Gala in 2025. They are members of St. Rita Parish and have three children: Maegan (33), Brian (32), Shannon (27); and two grandchildren: George Bell (2), Lyla Gossens (1).



THE 2024 PRESIDENT'S AWARD



Tom Merkel

Tom Merkel is a Managing Director and 30-year veteran of Merrill Lynch, where he leads a team responsible for over \$2.0 billion of client assets and has been recognized in Merrill's Circle of Excellence, a designation reserved for the firm's top performers. Tom is a graduate of The University of North Carolina at Chapel Hill with a degree in Economics. A Certified Financial Manager, he earned his Certified Investment Management Analyst accreditation through the Wharton Business School at the University of Pennsylvania.

Tom joined the Ursuline Academy Board of Trustees in 2014 and served as Board Chair from 2018-2021, adeptly guiding the Academy through the challenges of the pandemic and a major transformation of the Ursuline campus. He has been a member of the Ursuline Finance Committee since 2009. He is a Board Member of the Ursuline Educational Foundation (UEF) and a Canonical Steward on the UEF Sponsors Counsel. He had also served as Co-Chair of Ursuline's Athletic Field capital campaign.

Tom was a member of The Catholic Foundation Board of Trustees for 13 years, ultimately serving as Chairman. He has served on the Endowment Committee of University of Dallas, the School Board of Christ the King Catholic School, and as Co-Chair of Christ the King's Community Center capital campaign steering committee. He currently serves on the Bishop's Diocesan Finance Council where he chairs the Investment Committee and is a member of the Finance Committee for the National Shrine Cathedral of Our Lady of Guadalupe.

Tom and his wife, Sue, are parishioners of Christ the King. Their two daughters, Maddie '12 and Emily '13, both attended Ursuline, and two sons, James '15 and Joey '16, are both Jesuit graduates; all four children now proudly serve as officers in the U.S. Navy and U.S. Marine Corps.



THE 2024 PRESIDENT'S AWARD



Jon Piot

Jon Piot is Co-Founder and Managing Director of Scout Energy Partners, a \$3.0 billion energy private equity fund for institutional investors including university endowments, pension funds, and foundations.

Previously, he co-founded Censeohealth (now Signify Health), a healthcare company providing prospective health evaluations for Medicare Advantage health insurance plans, Medestar (now Doximity), a locum tenens healthcare company serving hospitals nationwide, and Impact Innovations Group, a provider of technology outsourcing services to mid-market companies. In prior positions at Booz Allen & Hamilton and Anderson Consulting (now Accenture), Jon consulted with many Fortune 500 companies on IT strategy and systems development.

Jon's extraordinary commitment to volunteer leadership and service to Ursuline and the Catholic community includes two six-year terms on the Ursuline Academy Board of Trustees, from 2004-2011 (Chair 2010-2011) and again from 2018-2024 (Chair 2021-2024). He also served as Finance Committee Chair (2006-2009) and as Chair of the Ursuline President Search Committee (2011-2012). He was a member of the Ursuline Foundation Board from 2013-2017. At Jesuit, Jon served on the Jesuit Foundation Board 2017-2023, its Investment Committee (Chair 2021-2023), and on the Finance Committee from 2013-2016. He was a member of the School Board at Christ the King School from 2007-2010.

Jon earned his BS in Computer Science at Southern Methodist University, and received his MBA from Harvard Business School. He has authored three books: *Outperform, Inside the Investment Strategy of Billion Dollar Endowments*, (John Wiley & Sons, 2010); *The Executive's Guide to Information Technology*, (John Wiley & Sons, 2003 & 2007); and *The Professional Services Firm Bible*, (John Wiley & Sons, 2005).

Jon and his wife Susan Irwin Piot, Ursuline Academy Class of 1987, are members of Christ the King Parish. They have three children: Lauren '15 and Allison '17, both Ursuline graduates, and William, Jesuit Class of 2019.





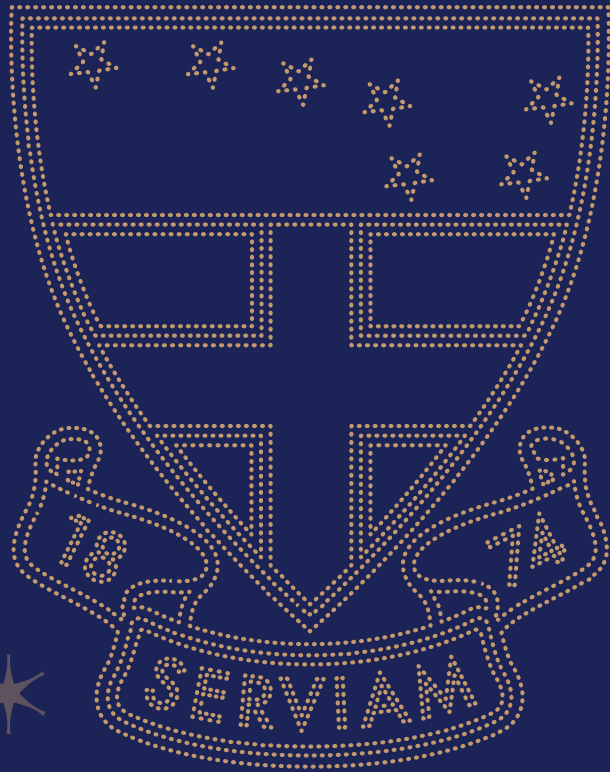

The **CAMPAIGN** for **URSULINE**
Act, Move, Believe



URSULINE DALLAS

150 YEARS





Honoring Servant Leaders

Congratulations to Bob Galecke, John Grimes Jr., Win Bell,
Tom Merkel, and Jon Piot, the 2024 President's Award
recipients, from a grateful Ursuline community.

FOUNDED IN 1874, URSULINE ACADEMY OF DALLAS IS AN INDEPENDENT CATHOLIC COLLEGE PREPARATORY SCHOOL FOR YOUNG WOMEN SPONSORED BY THE URSULINE SISTERS.

THE MISSION OF URSULINE ACADEMY IS THE TOTAL DEVELOPMENT OF THE INDIVIDUAL STUDENT THROUGH SPIRITUAL FORMATION, INTELLECTUAL GROWTH, SERVICE TO OTHERS, AND BUILDING OF COMMUNITY.

URSULINE ACADEMY EDUCATES YOUNG WOMEN FOR LEADERSHIP IN A GLOBAL SOCIETY.



URSULINE ACADEMY OF DALLAS