



BRECK SCHOOL DONOR IMPACT REPORT

# 2023-24





## DONOR IMPACT REPORT 2023-24

Breck School  
123 Ottawa Ave. N.  
Golden Valley, MN 55422

### EMAIL

communications@breckschool.org

### HEAD OF SCHOOL

Natalia R. Hernández, Ed.D.

### ADVANCEMENT DEPARTMENT

Denice Coyne, *Annual Giving Manager*  
Stacy Glaus, *Chief Advancement Officer*  
Halle Huff '13, *Event Manager*  
Leslie Nelson-Abell, *Donor Relations Manager*  
Brian Sobas, *Director of Alumni Engagement*  
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### COMMUNICATIONS DEPARTMENT

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Stacy Glaus, *Chief Advancement Officer*  
Rosie Moroney, *Content Strategist*  
Isaiah Rustad, *Creative Strategist*  
Abby Terrell, *Graphic Designer*

### PRINTER

First Impression Group





A photograph of two people hugging on a grassy field with trees in the background. The person on the left is wearing a dark blue long-sleeved shirt and dark shorts. The person on the right is wearing a light-colored hoodie and dark shorts. They are standing on a green lawn with scattered brown leaves. In the background, there are trees with green and yellow foliage, and a body of water is visible.

# Our Community

## The greatest gift

The Milchman family turns their belief in Breck's mission into philanthropy.

## Starting small

Preschooler Joey Ellis '37 understands the importance of giving back to the Breck community.

## Inspired generosity

First grade/senior buddies is a beloved Breck tradition — and moved the Coburn/Schwichtenberg family to make a meaningful donation.

## Legacy builders

The Hustad/Hester family hopes to inspire families to look at their giving in a new way.

## Life changing

Breck's longest tenured former faculty and staff member Marion Jones Kennon is honored with a new endowed fund.

## More

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***On this page:*** Members of the 2023–24 cross country team huddle during a practice last fall. Photo courtesy of Alicia Korpi.

***On the cover:*** Members of the Class of 2024 in the Chapel of the Holy Spirit during Commencement on June 3, 2024.

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# From the Board of Trustees

Dear Breck supporters and friends,

Over the last year, we've had the honor and privilege of working alongside both our Board of Trustees and our talented faculty and staff to write and release Breck's newest five-year strategic plan, *Future Focus*. Philanthropy fuels missions, and we couldn't be more honored to present this Donor Impact Report on behalf of our school community that captures the donors at every level who believe in our mission — and our future.

The dreams we have for our school laid out in *Future Focus* rely on the philanthropy and support of the families, alums, parents, grandparents, friends, faculty, and staff who live and exist at Breck today. Throughout the pages that follow, you will see stories of generational philanthropic leaders within our school alongside those emerging champions of our mission. The investments we all make today will continue to benefit our school for years to come, and we are so fortunate to have a dedicated community committed to our future.

When we look back on the philanthropic accomplishments of this year, we are proud that our community came together in so many important ways to enrich our community and the lives of our students — like through the renovation of our Admissions space and the staggering support of our Blue & Gold Bash. We recognize that you have many philanthropic opportunities that come across your plate every year, and we are so incredibly grateful for all of those who have said yes to supporting Breck: our students past and present.

In gratitude,



A handwritten signature in black ink that reads "Natalia R. Hernández, Ed.D.".

Natalia R. Hernández, Ed.D.  
*Head of School*



A handwritten signature in black ink that reads "Rich Mattera".

Rich Mattera  
*President, Board of Trustees*

# End of Year Highlights: 2023–24


## YOUR GIFTS

**1160** TOTAL donors

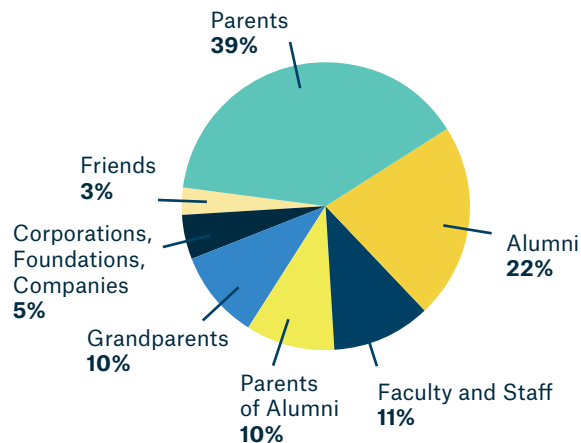
  
**300**  
ALUMNI donors

  
**230**  
donors gave \$2500 or more

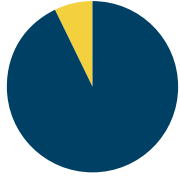
  
**180**  
FIRST-TIME donors

**56%**   
FACULTY/STAFF donated to the Breck Fund

## Distribution of TOTAL PHILANTHROPY by donor group



## YOUR IMPACT


  
**93%**  
of students scored 3 or higher on their **AP EXAMS**

  
**11,800**  
COMMUNITY SERVICE HOURS volunteered by the Class of 2024 over four years


  
**\$8**  
MILLION+ in FINANCIAL AID distributed

  
**4TH**  
MOREHEAD-CAIN SCHOLAR awarded in the last 10 years (University of North Carolina at Chapel Hill)

**98** students from the Class of 2024 are attending **70 DIFFERENT COLLEGES**

  
**83.5%**  
of students in grades 6–12 participated in **ATHLETICS**

  
**50+**  
courses offered on campus during **MAY PROGRAM**

**34** students participated in advanced science, history, and math **RESEARCH COURSES** 



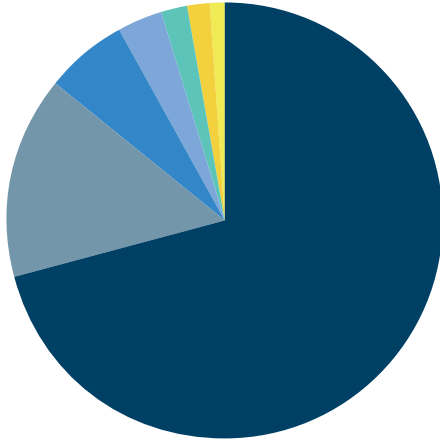




# 2023–24 Operating Summary

## (UNAUDITED)

### Income

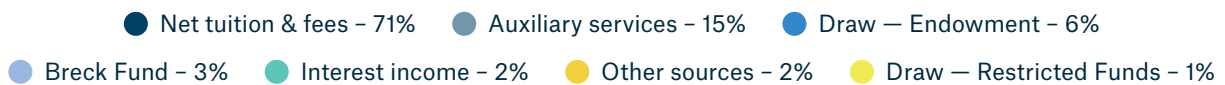


Student tuition and fees	\$ 41,908,165
– Student aid	(8,661,366)
<b>Net tuition and fees</b>	<b>33,246,799</b>

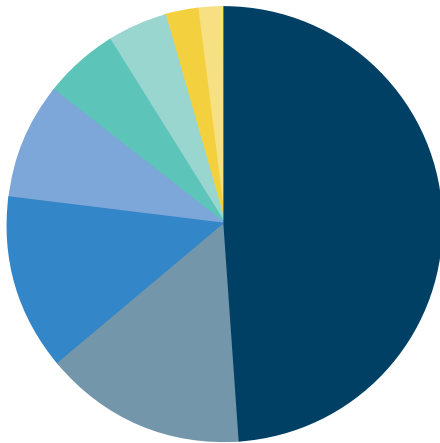
Auxiliary services	6,949,122
Draw — Endowment	2,946,219
Breck Fund	1,565,060
Interest income	874,993
Other sources <i>(includes Blue &amp; Gold Bash)</i>	746,403
Draw — Restricted Funds*	460,180

**Total Income** **\$ 46,788,776**

*\*Includes major gift funding available to the operating fund.*



### Expenses

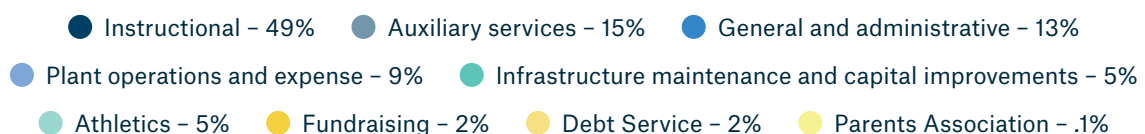


Instructional	\$ 22,878,375
Auxiliary services	7,034,073
General and administrative	6,117,814
Plant operations and expense	4,099,906
Infrastructure maintenance and capital improvements	2,525,622
Athletics	2,128,570
Fundraising*	1,105,495
Debt Service	857,600
Parents Association expenses	41,321

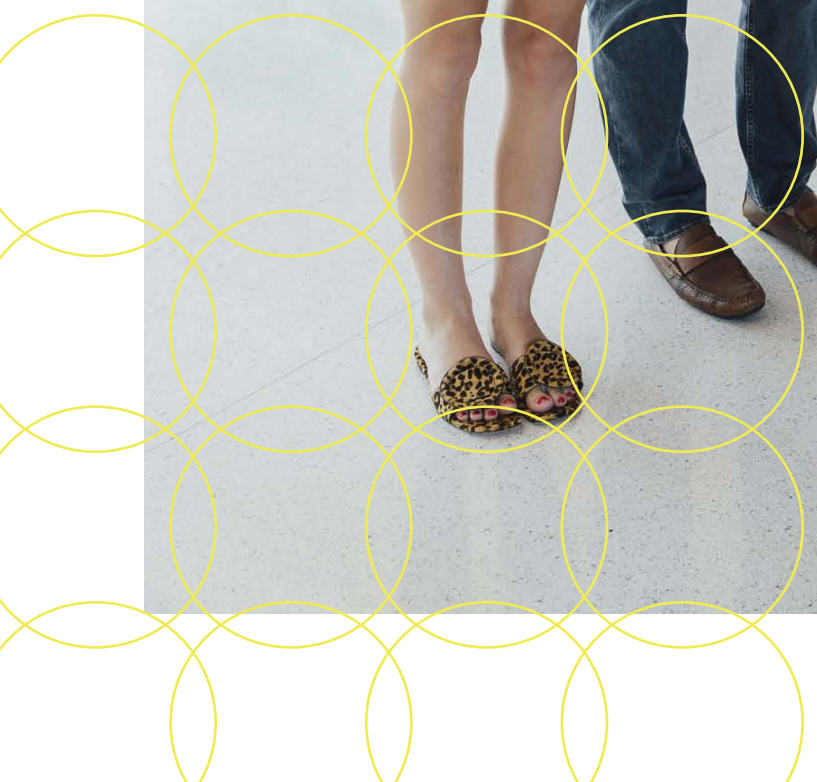
**Total Expenses** **\$ 46,788,776**

**Excess (Deficiency)** **\$ —**

*\* Includes alumni engagement and events.*



Breck is a 501(c)(3) non-profit. Gifts to Breck are tax deductible to the full extent of the law (Tax ID #41-06938894).





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# The greatest gift

## The Milchman family turns their belief in Breck's mission into philanthropy.

As their family's 17-year tenure at Breck comes to a close, Susan and Scot Milchman reflect on what they have loved about being part of the Breck community. "I don't even know if I can prioritize or pick just one thing," says Susan. "There are so many things that make this school so special."

Daughters Willow Milchman '21 and Emerson Milchman '24 both started at Breck in pre-school. From the beloved Lower School events like the Halloween Parade to the Washington D.C. trip in Middle School to countless swim meets and hockey games in Upper School — not to mention the rigorous academic courses throughout — the opportunities their daughters had at Breck were unparalleled. But what stands out to Susan and Scot is who their daughters and their peers have become thanks to their Breck experience.

"Our children not only got an amazing education here, but they're very well-mannered and full of respect," Susan explains. "There's a quiet confidence with the kids here, and there's a humility, too. I love that combination of confidence and humility — and also awareness of community."

With Willow at the University of Oregon studying public relations and psychology and Emerson now at the University of Colorado Boulder studying on a pre-med track, Susan and Scot know Breck has set up their daughters for success.

"Breck is very competitive — academically, scholastically, and athletically — and students understand they have to work very hard for what they get. But the rewards are great," says Scot. "Students know that if they put in the effort, they should have the skills in order to succeed."

The Milchmans have long been philanthropic supporters of Breck, and in their final year as Breck parents, they wanted to make a meaningful gift. With this year's Blue & Gold Bash highlighting Breck's science program, it felt natural to invest in that subject area — one that had made a significant impact on their daughters.

"I think the science programs here are incredible, and for my kids to be so excited about science was really special to see," says Susan. "I know just from sitting in the back-to-school nights with the science teachers how passionate they really are about science. So giving money to that program was a no brainer for us."

Their gift this year is representative of their dedicated history of investing in Breck's mission. Prioritizing philanthropy to Breck is fueled by the Milchmans' overwhelming gratitude for the school and their daughters' experiences over the years.

"I was so happy and proud to have my children here, and the programs all around are pretty darn incredible," says Susan. "Being able to go to school here is a gift. We've given our kids a gift, and we just want to give back to that in some way."







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# Starting small

## **Preschooler Joey Ellis '37 understands the importance of giving back to the Breck community.**

Breck students do amazing things every single day. They are dynamic examples of Breck's mission in action — every day becoming confident leaders who lead lives of intellectual curiosity, self-knowledge, and social responsibility.

Take Joey Ellis '37, for example.

In 2023-24, Joey was in her second year at Breck as a preschool student in Ms. Greibrok's class. After reading in the *Doing Good Together* newsletter about giving back to the community, Joey's family decided to make a "giving box." The family could choose a cause or organization to raise money for, and once the box was full of coins, they would give it away. Parents Ashley and David gave Joey a few options for whom they could collect the money: sick kids in the hospital, animals, and kids who can't afford school. Joey knew right away where she wanted the giving box to go: Breck.

"I want to make sure that kids can go to school just like I do," she told her parents. After collecting coins from her parents and grandparents, Joey made a \$2.24 donation to the Breck Fund.

Even our youngest learners like Joey understand that Breck is a special place — and that it is our collective commitment to our community that makes Breck *Breck*. Every gift, regardless of size, makes a difference. Thank you, Joey, for your generous donation and for inspiring us all with your big heart.





*Photo courtesy of Anne Schwichtenberg*

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# Inspired generosity

## **First grade/senior buddies is a beloved Breck tradition — and moved the Coburn/Schwichtenberg family to make a meaningful donation.**

Charlotte Coburn '35 always knew when it was a day she would see her senior buddy, Annalise Gunther '24.

"Charlotte would come home with the art they made and would say 'Look what we did together,' and they would always be pictures of them together," says her mom, Anne Schwichtenberg. "She just loved having a senior buddy."

Throughout the year, the pair would get together during school, wave to each other in the halls, and even show up for special events, like Annalise's senior night for soccer (pictured left) or the end-of-year Baccalaureate ceremony.

Annalise was a role model for Charlotte, and for her mom and dad, Joel Coburn, as well.

"As amazing as it is to see the relationship between the kids, it's also been nice for us to play forward what it's gonna look like when we're at the end of our journey — to start the Breck experience knowing how it's going to finish."

At the Blue & Gold Bash in March, Schwichtenberg and Coburn knew they wanted to make a meaningful donation to Breck that acknowledged the amazing experience Charlotte was having at the school.

"Children are just the most important thing in the world. And Breck is a place that cares about children and cares about the people who are caring for them," she says. "There's no better money we could spend than the investment in your children feeling loved and cared for and for the cultivation of their character."

When they learned there was a live auction item at the Bash that included reserved seats and parking for Commencement, they had an idea. What if they gifted that to Charlotte's senior buddy and her family? What could be more meaningful than to honor the special relationship they had built throughout the year?

"We thought, 'this absolutely feels like the right thing to do to just pay it forward,'" says Schwichtenberg. "There's something about giving that just kind of cascades and doubles over. That's the right kind of giving to me."

That giving spirit multiplied. The Gunther family showed their appreciation for the generous gift by coordinating a donut day for the entire first grade.

Even though Annalise has now graduated, her sister Addy Gunther '25 will continue to look out for Charlotte. Schwichtenberg imagines what it will be like in 10 years when her daughter is someone's senior buddy, and she hopes Charlotte uses Annalise as a model.

"I hope Charlotte invests in herself to become her best self and that she can bring that out in other people," she explains. "I think that's what Annalise did: She was this kind, compassionate person who could bring out the best in a little kid who just thinks the world of her."





Photos courtesy of Kathleen Hustad



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# Legacy builders

## **The Hustad/Hester family hope to inspire families to look at their giving in a new way.**

When Kathleen Hustad and Derek Hester began estate planning when their son, sixth grader Cole Hester '34, was in kindergarten (pictured bottom left), they aspired to leave a legacy at the organizations that have made a profound impact on their family.

"Breck was at the top of the list of the institutions that have made a transformative difference in our family's life," Hustad explains. "When you have one child, you want a community, and Breck is like our family. So it was just a very natural thing when we think about our legacy to give back because I genuinely believe every kid deserves an education — and a community — like Breck."

Hustad and Hester are now part of Breck's James Lloyd Breck Society, a group of individuals and families who have established a future gift to support Breck. While they knew Breck was a special place back when Cole was in kindergarten, their gratitude and admiration for this place has only continued to grow.

"Breck has allowed us to support Cole to work towards becoming the best possible person that he can be," says Hester. "Breck has really encouraged him to develop and follow his interests — to find out 'what lights your fire?' and be supported in whatever that is. Teachers really do care about the students and making sure they are getting the best out of them as possible for how the kids take in information and how they learn best."

Hustad agrees: "I believe Breck makes change makers. It helps students identify with their unique strengths and gifts and helps them navigate and find their path in this world."

They deeply understand that the experience Cole has had at Breck is made possible by those who have philanthropically invested in the school. "There's so much enrichment that is possible because of the financial contributions of the community," says Hustad.

"Every dollar counts," Hester believes. "Every dollar can have not just an impact but an exponential impact. You're expanding knowledge and building community — it's synergistic."

Including Breck in their estate plans — and subsequently joining the James Lloyd Breck Society, which, Hustad remarks, only takes "five to 10 minutes to fill out a form" — is one way the Hustad/Hester family has chosen to give back to the Breck community. But they recognize there are many different ways for their fellow families to invest in Breck.

"We're a heart-driven family, and we like making a difference," Hustad says. "We hope that this story might inspire other families to really look at their giving in a new way."





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# Life changing

## **Breck's longest tenured former faculty and staff member Marion Jones Kennon is honored with a new endowed fund.**

*"I loved teaching children. I loved having an impact." —Marion Jones Kennon*

This spring, the Breck community came together to celebrate Marion Jones Kennon, the endowed scholarship fund named in her honor, and her enduring legacy. From her tenure as a kindergarten teacher to her leading our financial aid program, for 46 years Marion played a pivotal role in bringing families into the Breck community and was instrumental in fostering diversity within our student population. But her role was much more than just helping families find Breck: Marion ensured that families and students felt a genuine sense of belonging at Breck.

Throughout a chapel service and luncheon, our community had the privilege of hearing heartfelt tributes from faculty, staff, and community members who had been deeply touched by Marion and her tireless efforts; in addition, Marion herself shared her wisdom and insight. The event was made possible by the visionary collaboration of Breck alumnae Rachel Hardeman '98, Danielle Vrieze '99, Anna Otieno '99, Simone Hardeman-Jones '98, Batala-Ra McFarlane '92, (pictured left with Marion Jones Kennon, center) in addition to the partnership and support of Susan Bass Roberts, Kim Price, and Sharon Ryan.

The Marion Jones Kennon Endowed Scholarship Fund will support black-identifying students in perpetuity, granting them access to the life-changing education offered at Breck.





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