

THE Good Word

END OF YEAR *Giving*

Late this summer a friend told us she had received her first Christmas present. *Received a Christmas present. In August! Wrapped and delivered.*

It was a special occasion, it turned out – a special gift that couldn't wait for Christmas, but was better used as a token of support for a friend.

Nevertheless, the gift had been purchased and wrapped and intended for Christmas. Some people really plan ahead.

And more of us probably should.

That's the message your legal and financial advisors are delivering this year – and The Catholic Foundation echoes it: You may want to focus on your year-end charitable giving now – and not wait until you are inundated with requests and pledge cards. We can help.

In fact, you can make a gift to The Catholic Foundation at any time – and request us to distribute it to your favorite 501(c)(3) charities at year-end or any time. You can create or contribute to a Donor

Advised Fund, qualify for the applicable tax deduction this year, and advise the Foundation how and when you wish the funds distributed to other charities both this year and in the future.

If you simply wish to streamline your charitable giving, The Catholic Foundation can do that for you, too. You can make a single (tax deductible) gift to the Foundation's Unrestricted Endowment Fund and trust our experienced grant-makers' professional assessment of community needs.

If you are considering making a charitable gift from your Individual Retirement Account (IRA), the one-time opportunity to give up to \$100,000 tax-free directly from your IRA to a charity or charitable fund (Scholarship, Field-of-Interest, Designated Fund or the Foundation's Unrestricted Endowment Fund but not to a Donor Advised Fund) expires December 31, 2007. Please consult your financial advisor ahead of time and call the Foundation for assistance.



If you wish to make more complex arrangements, it is probably best to begin now as well. The Catholic Foundation is equipped to work with you and your legal and financial advisors to establish Charitable Lead and/or Charitable Remainder Trusts before year-end.

Finally, you may wish to consider honoring friends and family this holiday season with a contribution to The Catholic Foundation that becomes a gift of charity made in their names. The Catholic Foundation can help facilitate these gifts at your convenience.

Please call us today at 972.661.9792 to get the process started. 🐣

THE PRESIDENT'S LETTER



As we approach the end of another year, I'd like to take a moment to report on our board and officers' activities, particularly those involving implementation of the 2006 Strategic Plan.

The plan calls for detailed reviews of both our grantmaking and development practices. Special trustee committees have been formed to ensure that the Foundation is informed of and utilizing "best practices" in both areas. We have also placed special emphasis on our commitment to leadership in the Catholic philanthropic community. That is, we are making every effort to make our work exemplary – both in services provided to our donors and in services provided, thanks to our donors, to the Catholic community.

The Foundation Board is hard at work on these tasks. But when it comes to realizing our vision, we truly depend on you, our donors. While we expect to make a total of \$4 to \$5 million in grants to the Catholic community, fully two-thirds of this amount can be attributed directly to your generosity. Your generosity fuels our philanthropic mission and makes it possible, just as the economies, efficiencies and focus of the Foundation compound and ultimately perpetuate your gifts. I think Jere Thompson said it best at the 2006 Catholic Foundation Award Dinner: "By ourselves we can do good things; together we can accomplish great things."

With this issue of The Good Word, we invite you to further greatness.

Edwin M. Schaffler

EDWIN M. SCHAFFLER

A Strong FOUNDATION

ADVISORY COUNCIL



President and CEO of The Catholic Foundation Ed Schaffler welcomes Bishop Kevin J. Farrell to the Foundation's annual Advisory Council meeting.

Bishop Kevin Farrell, just 20 days into his tenure in Dallas, attended The Catholic Foundation's annual Advisory Council meeting at the Belo Mansion this summer to salute the work of the Foundation.

A member of the Foundation's Board of Trustees by virtue of his office in the Diocese, he noted: "the history of the last 50 years [in the Diocese of Dallas] has been fantastic."

Then he added, "Individuals can only do so much. But through charities and this Foundation, we can extend the goodness of our hearts to thousands of people."

The Advisory Council, according to chairman Lydia Novokov, helps extend that goodness by enhancing the Foundation's stature and visibility, and providing an essential link between the Foundation and potential donors.

"You will be the difference in the Foundation's growth and impact in the years to come," she told the more than 50 members of the Council in attendance.

After Foundation Chairman Len Ruby addressed the gathering, Foundation President Ed Schaffler outlined the Foundation's renewed commitment to its donors and to meeting the needs of the Catholic community. He reviewed the

revised mission statement, vision statement, values and key goals approved by the trustees this past year, noting, "We want the people we depend on to know we care about them." He also described advances the board has made in growing the Foundation resources, improving communication, and developing proactive grant-making programs. 🦋

PROFESSIONAL ADVISOR SERIES

Even professionals go back to school. As part of its newly initiated Advisors Series, The Catholic Foundation hosted a seminar for the region's estate and wealth management professionals by Professor Jeffrey N. Pennell, the Richard H. Clark Professor of Law at Emory University, Atlanta, on Thursday, October 18, at the Belo Mansion.

"We were pleased to offer our community a professional resource of such national stature as Professor Pennell," said Cheryl Mansour, the Foundation's Vice President for Development. "We are also most grateful to the law firm of Gardere Wynne Sewell, LLP and Carter Financial Management for joining the Foundation as the Presenting Sponsors of the seminar."

Additional sponsors of the Advisor Series included: Bisignano & Harrison, LLP;

Black/Mann & Graham, LLP; Comerica Wealth and Institutional Management; Gruber Hurst Johansen Hail, LLP; Johnson Jordan Nipper & Monk, PC; Kane Russell Coleman & Logan, PC; Merrill Lynch; Middleton Burns & Davis, PC; Shamoun Klatsky Norman, LLP; Southwest Securities; Texas Capital Bank; Thompson Knight, LLP; and Travis Wolff. "These friends of the Foundation, all esteemed legal and financial firms, provided an important endorsement of this program," Cheryl said.

The breakfast program for Dallas area legal and financial advisors featured Current Cases with Planning Significance and key updates on many of the hot topics and current developments in estate planning.

Jeffrey Pennell is the successor author of Casner & Pennell on *Estate Planning* (6th edition) and numerous books, portfolios, monographs, articles and institute chapters. A graduate of Northwestern University School of Law, he is a Member of the American Law Institute, an Advisor for its Restatement of the Law of Property – Wills and Other Donative Transfers – and an Associate Reporter for its Restatement of the Law of Trusts.

To register for future events in The Advisors Series, visit www.catholicfoundation.com or call 972.661.9792. 🦋

CATHOLIC FOUNDATION ANNUAL AWARD DINNER

The Catholic Foundation is planning the 2008 annual Award Dinner and we have made some big changes in the event – but we are not yet ready to reveal the name of our honoree.

T.V. and Lou Ann Mangelsdorf are the first chairs of the event and we are thrilled. T.V. chaired the Board of Trustees in 1999 and 2000. A 2008 Dinner Committee has been organized and is busy planning the event. The Dinner has a new date and location and will be at the Hilton Anatole Hotel in the Grand Ballroom on Wednesday, February 20. We will recognize the honoree and also present The Catholic Foundation Scholar's Award to an outstanding high school junior from one of the High Schools within the Diocese. Additionally, Bishop Kevin J. Farrell will be a featured speaker.

It is shaping up to be a big evening. We invite you to join us in celebrating all of the good works The Catholic Foundation facilitates in our Catholic Community. 🦋

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour,
Vice President of Development

At this time of year, it is sometimes helpful to draw a distinction between Charity and Philanthropy. While they both involve financial resources, generosity, and the will to do good, Charity is most often a single, simple act of giving in response to someone's request, whereas Philanthropy is a way of giving in response to your intended place and role in the community. Thus, Charity is at work when you respond to the myriad seasonal invitations to donate to countless causes. And Philanthropy is at work when you have thought through a sustainable program of giving to the cause or causes you truly believe in.

Philanthropy may seem more complicated. But it doesn't have to be. Nor does it have to involve more money. It is simply a more thoughtful commitment of your charitable resources, a more focused way of making a difference. And The Catholic Foundation is in the business of making your personal Philanthropy easy, effective, and deeply satisfying.

This issue of our newsletter, *The Good Word*, highlights many of the ways the Foundation has been able to facilitate our donors' philanthropic intentions to support, improve, and advance education at every level in our community. Some wanted to encourage children at risk because of poverty and/or poor-performing schools, some wanted to reward particularly good educators, some wanted to enrich opportunities to attend college, and some wanted to promote academic achievement and community service. Many donors chose specifically to support their

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ELIZABETH TOON SCHOLARSHIP *How Scholarships Happen*

Brant Landry wasn't ready to be a philanthropist.

But when his close friend Elizabeth Toon was killed in a hit-and-run accident last November, he contacted The Catholic Foundation to help him establish a fitting memorial to her. The result of his generous effort is The Elizabeth Toon Memorial Scholarship Fund of The Catholic Foundation to which more than \$100,000 was contributed by family, friends, and businesses in the month immediately following her tragic death.

To commemorate Elizabeth Toon, the award honors academic achievement, school and extracurricular activities, citizenship, leadership and outstanding personal qualities. It will be given to at least one graduating senior from Highland Park High School each year.

Ms. Toon, an outstanding Highland Park High School graduate, was a 2006 graduate of the University of Texas. She had recently taken a job in Los Angeles with International Creative Management when the accident occurred.

Another outstanding 2007 Highland Park High School graduating senior and community volunteer, Elizabeth Watkins, has been named the first scholarship recipient. She began her studies at the University of Arkansas this fall with plans to major in psychology.

In addition to facilitating contributions to the fund, The Catholic Foundation works with the Highland Park Education Foundation to identify qualified candidates and present the award at the annual seniors Honors Day at HPHS.

"Our role with a scholarship fund, as with any fund of the Foundation, is to serve our donors' vision of what they can do to make a



Highland Park graduate Elizabeth Watkins (third from left) is the first recipient of the Elizabeth Toon Memorial Scholarship. She has begun her first year at the University of Arkansas and plans to study psychology. Members of the selection committee for the award, made from the Elizabeth Toon Memorial Scholarship Fund of The Catholic Foundation, included (from left) Michael George of The Catholic Foundation, Janie Taylor, Miss Watkins (scholarship recipient), Martin Peck, Emily Guy, and Jim Ballard.

positive difference in the community," states Michael George, Senior Development Officer of the Foundation. "Often, as with the friends and family of Elizabeth Toon, their interest is education. By establishing a scholarship, they translate that interest into important financial support and serve generations to come. This scholarship fund is a beautiful way to perpetuate the high ideals of an exceptional young woman, and the Foundation is grateful to be of service to her family and friends." 🐟

Scholarship funds can be established at The Catholic Foundation with a suggested gift of \$30,000. Donors can establish the terms of the scholarship (academic achievement, a particular academic interest, community service, a specific school, or a general geographic area, for example), name the fund to honor or memorialize a person or an idea, and participate, to an extent, in the selection and awards process if they wish. The Catholic Foundation handles all administrative, management and reporting responsibilities involved in honoring each donor's intent.

A LIGHT On

MAKING THE GRADE WITH CATHOLIC FOUNDATION GRANTS

School improvement comes in all sizes and shapes and takes place in many arenas – politics, neighborhoods, academia, and even charitable works. For philanthropists committed to effective educational change, The Catholic Foundation offers a range of charitable opportunities created to enhance learning and learning opportunities for young people throughout the community.



Literacy Program at the Santa Clara Catholic Academy

A few exciting examples:

The Catholic Foundation made a \$50,000 grant to begin a **Literacy Program at the Santa Clara Catholic Academy**. With more than half of the predominantly Hispanic students reading below grade level, principal Todd Higginbotham sought to institute a pilot program called “The Reading Edge” to give each Santa Clara student a 95-minute reading block each day and to add a literacy specialist, or reading coach, to his staff. In addition, the program will provide teacher in-service training, testing, and special program materials and assessments which are, together, expected to advance students at Santa Clara to a 90 percent achievement rate. According to Mr. Higginbotham, literacy correlates to improved high school graduation rates and reduced poverty.

At **Good Shepherd School** in Garland, The Catholic Foundation helped to build a new science lab. Elsewhere, the Foundation helped fund the **Big Thought** program,

which provides art experiences to young children, and a tutoring program in four Diocesan schools.

The Catholic Foundation is also involved in a unique partnership with the **Children’s Education Fund**, a privately-funded tuition assistance scholarship program developed to help families improve their children’s educational opportunities. This year, thanks to CEF grants of about \$1500 each, nearly 500 students are enrolled in 70 different Dallas area schools. In addition to awarding a \$50,000 grant from the Foundation’s Unrestricted Endowment Fund, the Foundation acts as a conduit for individual donations which, when made through The Catholic Foundation, are matched 50 cents on the dollar, increasing the value of each gift by half.



Children’s Education Fund supports students at St. Cecilia Catholic School.

The Catholic Foundation offers a range of charitable opportunities created to enhance learning and learning opportunities for young people throughout the community.

A Dallas family, that wishes to remain anonymous, has funded another generous program, the **Work of Heart Awards**, through the Foundation for three years. This year, the family has issued an invitation to the larger community to help endow the Work of Heart Awards fund so that these \$500 and, in some cases, \$5,000 grants to outstanding Catholic educators can be continued. The family will match all individual contributions

to The Catholic Foundation for the Work of Heart Awards Fund up to a yet to be determined amount. To date, the program has awarded \$223,500 to 321 individuals serving children in 36 area schools, and a call for nominations for this year’s awards has been issued to students, parents, school administrators, and peer educators throughout the lower, middle, and high schools of the Diocese of Dallas. Criteria for the awards include tenure and leadership, acts of kindness and charity, Christian example, mentoring, and simply going the extra mile for an individual student, family, or the community.

As the Diocese grows, it makes a compelling case for its growing educational needs – buildings, technology, instruction, and special programs – and thus education remains a top charitable priority for the Foundation. While many needs will be addressed with grants from the Foundation’s Unrestricted Endowment Fund, others can be linked to donors with a passion for young people and schools, even specific schools – your alma mater, for example. The Catholic Foundation excels at harnessing that passion with funds designed specifically to meet your most thoughtful charitable goals for education in our community. Call the Foundation today: 972.661.9792. 🐟

FALL GRANT CYCLE

This fall The Catholic Foundation will announce it has made an impressive number of charitable grants to educational, religious, and social service organizations throughout the Diocese. The awards will total more than \$600,000 for this cycle of requests, and the Foundation will be rightfully pleased to have been able to make such a meaningful difference in the community.

At the same time, the Foundation trustees and officers, and especially the members of the Distribution Committee, will be disappointed they weren't able to do more. They realize that with a total of \$1.8 million in requests but only \$600,000 available for distribution, the Foundation couldn't meet all the needs articulated in the current grant applications. It's been this way, according to Don Hanratty, a five-year veteran and current chairman of the Distribution Committee, for many years.

As the primary philanthropic resource for the people and institutions of the Diocese of Dallas, however, The Catholic Foundation's vision is to one day be able to meet all of those needs. To do so, however, will require a broader, deeper charitable commitment by the people of Dallas. The Foundation will need more donors willing to help build the Unrestricted Endowment Fund and at the same time more donors willing to invest their

charitable dollars and intentions with the Foundation in Donor-Advised and otherwise Restricted Funds. Both resources, prudently invested, will increase the Foundation's capacity to meet ongoing and emerging needs in the community.

Why give to, or through, The Catholic Foundation and not directly to your own church, school or favorite cause? In today's increasingly complex legal and financial environments, The Catholic Foundation provides a welcome professionalism to your charitable giving and keeps it simple. In addition, The Catholic Foundation's experience in and commitment to the community means your gift will be used efficiently and effectively. And finally, the combining and eventual compounding of many gifts enhances the impact charity can have in our Catholic community – today and for all time.

Please join us. At a time when less than half the need in our community is being met, your gifts are more important than ever. 🙏



Giving 101

(Continued from page 3)

alma maters, or their children's schools, or their parish school. Others paid tribute to a particular program in the neighborhood school. And yet others have established funds as memorials

to friends and loved ones.

We at The Catholic Foundation can translate virtually any legitimate vision to support education into a philanthropic opportunity. And not just education, either. Any charitable 501(c)(3) organization qualifies. We can turn your simple charitable gift into a durable philanthropic fund. We can compound your lone charitable act by joining the resources of other like-minded donors in a Field of Interest Fund, in the Foundation's Unrestricted Endowment Fund, or in a new or existing individual fund established to meet the specifically-defined philanthropic need you wish to address.

We empower you to enhance your gifts with added focus. In addition, because the Foundation takes on all the administrative tasks – investing, administering, researching charitable needs, awarding grants, record-keeping, and reporting – you, too, can better focus on your unique philanthropic vision or legacy.

As the holiday season approaches, we are all generally inclined to offset the rampant materialism with charitable largesse. This year, however, the officers and staff of The Catholic Foundation would like you to consider working with us to develop a longer-term, more comprehensive plan for your charitable giving. We invite you to practice Philanthropy with us. Call us today.



HERALDING NEW ART IN THE PLAZA

"She is greeting those entering with promises of enlightenment and joy, and announcing a meaningful experience."

That's how Dallas artist Ann Cushing Ganz explains the trumpeting angel in her new work recently installed on the Catholic Foundation Plaza in the Dallas Arts District. The award-winning artist, whose painting was selected to be the second in a series of annual art wall installations by a panel of six judges, says she has always found angels symbolic of almost everything that is positive in the universe.

"Angels," she says, "mean hope, guidance, spirituality and peace and joy."

The year-old Plaza, which is located directly behind the Cathedral Shrine of the Virgin of Guadalupe, was created to be a refreshing, restful space for the people of Dallas in commemoration of the Foundation's 50th Anniversary.

Members of the Catholic Foundation Plaza Art Selection Committee included: Chairman Cindy Gummer, Katherine C. Berg, Christy Frazier, Reverend Eduardo Gonzales, David Hickman, Patricia Meadows, Gary Skotnicki, and Katherine Wagner. 🙏

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The Good Word

The Good Word is published to provide news and information about The Catholic Foundation's activities and programs. Any questions or comments should be sent to:

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