

THE Good Word

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FOUNDATION TO HONOR SISTER MARGARET ANN MOSER, O.S.U.

When Margaret Ann Moser attended Ursuline Academy of Dallas in the 1950s, little did she realize that she would return to the leafy campus on Walnut Hill Lane in 1989 as Sister Margaret Ann Moser, O.S.U., and go on to become the longest-serving president in the school's history.

The Catholic Foundation will honor Sister Margaret Ann with the 30th Catholic Foundation Award in recognition of her commitment and service to Catholic education and the Dallas community. Presentation of the award will be made during The Catholic Foundation Award Dinner on Friday, February 10, 2012, at the InterContinental Dallas.

A Dallas native, Sister Margaret Ann learned the importance of giving back at an early age, growing up as one of nine children in a family with deep roots in the Catholic



community. The daughter of Margaret Murrin Moser and the late A.C. Moser, Jr., she attended Ursuline Academy in both elementary and high school.

After graduating from Ursuline, Sister Margaret Ann earned a bachelor's degree in

history from the College of New Rochelle, New York, and her master's in theology at St. Mary's University in San Antonio. Her distinguished career in education includes teaching and administrative positions with Ursuline schools in St. Louis; Springfield, Illinois; and New Orleans.

Upon her retirement as Ursuline's president in July 2012, she will become president emerita to continue her work on a part-time basis to help build endowments with the Ursuline Academy of Dallas Foundation.

Spanning more than two decades, Sister Margaret Ann's achievements at Ursuline include increased enrollment from 545 to over 800 students, continual advances in curriculum, a pioneering technology program, gains in student diversity, and landmark growth of campus facilities.

She led a successful \$10 million capital campaign from 1993-2000 to fund facilities

(continued on page 5)

THE PRESIDENT'S LETTER



Just **Do It!** How many times have we heard that phrase since a famous shoe company made it a familiar part of our daily language?

Hopefully, you have had an opportunity to read the Foundation's annual report and have seen the great things that have been "**done**" because of the many **donors** of The Catholic Foundation.

There seems to be always more to **do** than any of us have time for so it is always amazing to see how much good really **does** happen every day throughout our Catholic community. The people behind the good works are indeed "**doers**", whether they are part of a paid staff or a volunteer. They all deserve our gratitude.

We also know that getting things **done** often (most times!) requires money and that is where the generous supporters of The Catholic Foundation

"Just **Do It!**". The Foundation's grants programs, both from the Unrestricted Endowment and from the many **donor** advised funds of the Foundation continue to respond, quickly in many cases, to the pressing needs of the community. The Foundation is the home for Catholic philanthropy in our Diocese. It is focused on bringing our community together to address needs throughout the 7,338 square miles of the Diocese.

None of this can be **done** without you. The need is greater than ever, so as the end of another year approaches, please think about the religious, charitable and educational organizations that are dear to you and give them a helping hand. The Catholic Foundation is here to serve you and help meet the needs throughout the Diocese, so please give us a call and let us help you "**Just Do It!**".

A handwritten signature in black ink that reads "Edwin M. Schaffler".

EDWIN M. SCHAFFLER

A Strong FOUNDATION

IN MEMORIAM:



Rita Gallagher Smith

Rita Gallagher Smith, a prominent, longtime resident of Wylie, Texas, and a generous

benefactor to The Catholic Foundation, died August 17, 2011.

Mrs. Smith, who worshipped at St. Anthony Catholic Church in Wylie, served on the boards of many organizations, including Wylie's Meals on Wheels, which she founded. A local elementary school is named after her, and the library bears the family name. In 2004, she was named Wylie's Citizen of the Year.

Along with her late husband, Truett, a banker, Mrs. Smith maintained several business interests in her hometown, including the Wylie Insurance Agency and the *Wylie News*, which she took over after Truett's death. After his death, Mrs. Smith was encouraged by several

friends to work with The Catholic Foundation to help her create her estate plan. When Mrs. Smith's planning was complete, her will included a generous bequest to the Foundation to support the church and charitable organizations that had been so much a part of her life.

Rita Smith's planned giving, through The Catholic Foundation, ensures that her legacy will continue on in Wylie and our Catholic community, long past her lifetime.



Lewis "Lew" Fred Vasel

Lewis "Lew" Fred Vasel, a former member of the board of trustees of The Catholic Foundation

and an ardent supporter of Our Lady of Perpetual Help Catholic School, passed away on July 24, 2011.

Lew, who served as chairman of the Our Lady of Perpetual Help Advisory Council, was also active in his parish of All Saints, the Knights and Ladies of the Holy Sepulchre of Jerusalem, the Serra Club of Metropolitan Dallas, Catholic Charities and the Catholic Community Appeal. He served in the U.S. Army, attaining the rank of Sergeant Major, and was a longtime employee of Dow Chemical and Pawnee Extrusion.

Known sometimes for his determined nature, Lew also had a kind heart and a good sense of humor. He was particularly dedicated to Our Lady of Perpetual Help Catholic School as it evolved over the years to reflect the changing needs of its Love Field neighborhood in Dallas.

Marianne McGonigle, who succeeded Lew as chair of the Our Lady of Perpetual Help Advisory Council, knew him and his late wife, Jean, for 15 years. "Catholic education was Lew's passion," she said. "He never stopped caring about the wonderful students, especially those at Our Lady of Perpetual Help." 🐟

UPDATING THE STRATEGIC PLAN

To be successful, an organization must have a strategic plan – a document that spells out what the organization is and how it will fulfill its mission over the next several years. Last spring, trustees of The Catholic Foundation began a task it undertakes periodically: updating its strategic plan aimed at keeping the organization on a path toward growth, effective grantmaking and a strong presence in the community.

The Board of Trustees is continually thinking down the road and managing by objective. "All things emanate from the plan," says Tom Merkel, board chairman. "The plan results in action items, and at quarterly board meetings trustees review the plan and ask what have we accomplished to meet our goals."

Strategic plans also help organizations adapt to changing times. "The greatest benefit of a strategic plan is that it helps keep things fresh and relevant," Merkel says. "The world of philanthropy and nonprofits does evolve over time, and by continually reviewing our plan, we make sure that we are headed in the right direction."

The planning process at The Catholic Foundation is "participative," meaning the 22 trustees are working together to develop the plan through consensus. By involving a mixture of people with different perspectives, the group can generate fresh insights into problems and create opportunities to meet the needs of the Catholic community.

Working this way helps develop a stronger organization, says Carole Rylander, a consultant who's assisting the Foundation with its plan. "This type of planning helps board members get to know and understand each other's capabilities and builds a strong, cohesive board," she says.

The staff of The Catholic Foundation also is involved in strategic planning meetings, says Merkel. "They are where the rubber meets the road and know how things work." Those who participated in creating the plan are likely to feel a sense of ownership for their part of the organization.

Following completion of the strategic plan in December, trustee committees will provide oversight of the action plans and guidance for staff members as required.



Trustees work to develop the 2011-2012 strategic plan.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

PLANNING A LEGACY

Most of us probably know that it's vital to have a will in Texas. If you die without one, state law will determine your heirs and how your property is to be left to them. Whether your estate is large or small, you want to leave no doubt in anyone's mind how your property is to be distributed.

When an estate becomes more complex – and when an individual wants to provide for charities – there are several arrangements that can be incorporated into

the will. Recently a Dallas donor using The Catholic Foundation as trustee had his attorney prepare a will that met several objectives, including charitable ones.

- First, the will contained a cash bequest to the Foundation to benefit the Catholic organizations that he had supported for many years.
- The will established a *charitable remainder trust*, in which property and money was donated to the Foundation and placed in the trust. The gift resulted in the trust's beneficiaries receiving income for life. After their lifetimes designated charities will receive the remainder in the trust.

- The will also established a *charitable lead trust*, which will provide income for the Foundation for a term not to exceed 20 years. After that, the remainder of the trust is transferred to beneficiaries.

By establishing a charitable remainder trust, the Dallas donor was able to provide for family members in the near term and charities later on. The lead trust did the opposite – provided support for charities immediately after his death, and for the long-term needs of his family in the future.

To learn more about how The Catholic Foundation can help you create an estate plan that meets your objectives, please call us at 972-661-9792.

DONOR PROFILE:

David and Sharon Saller

For Sharon and David Saller, volunteering is just a way of life. Sharon points to her children's first school days in Tyler, Texas, when she noticed the Catholic elementary school didn't have a decent playground. She raised money for one and then went on to start a bus program and even persuaded a local deli to serve food in the high school cafeteria.

"I don't know how you can have children in school without being involved," Sharon says. That has meant a lot of volunteering, with the 27 combined years of Catholic schooling for their three daughters and a son.

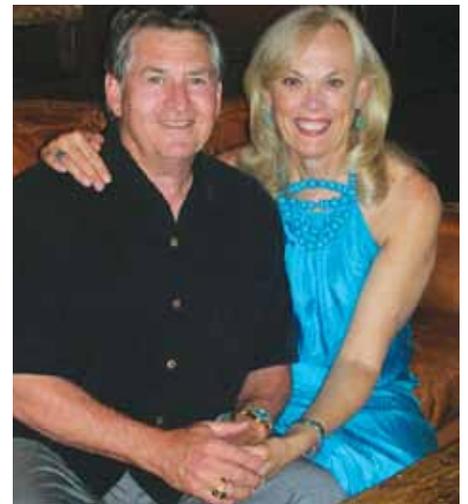
In 1989, Sharon, a native Texan, and David, from Memphis, Tenn., moved the family to Dallas. The tight-knit family joined Christ the King Catholic Church, where David was

instrumental in organizing the Conference of the Society of St. Vincent de Paul and Sharon is active in the Altar Society. Of their 10 grandchildren – all in Dallas – six attend school at Christ the King and one is at Bishop Lynch. David, owner of Deep Rock Resources, is a member of the Bishop Lynch Advisory Board and supports the Irish American Fund as well as St. Jude Children's Research Hospital in Memphis.

As a cancer survivor, Sharon is particularly passionate about the cause of colon cancer awareness. Five years ago, she was diagnosed with Stage 3 of the disease, even though she had previously been cleared during a colonoscopy. She emphasizes the importance of routine screenings and advises everyone to be your own advocate when dealing with medical matters.

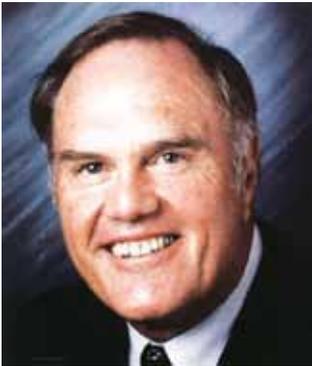
Education is a strong focus of the Sallers' volunteer work and their philanthropy, which includes a Donor Advised Fund at The Catholic Foundation, where David serves on the Advisory Council. "Catholic education is really

important to us, and we like to support it any way we can," Sharon says. "It's all a part of what we consider the most important things in life – faith, marriage and family. If we have any accomplishments, it's our family, setting examples and being there for them."



David and Sharon Saller

A LIGHT On



Ronald F. Walters

RONALD F. WALTERS SCHOLARSHIP FUND

When Our Lady of Perpetual Help Catholic School opened its doors for the 2011-2012 school year, 24 students, from kindergarteners to eighth graders, entered the classroom with assistance from a fund at The Catholic Foundation. They are the first recipients of the Ronald F. Walters Scholarship Fund, which was created through a gift to the Foundation from Walters' estate.

A native of Cincinnati, Ohio, Walters was reared by a single mother who worked very hard to ensure that he would be able to attend Catholic schools. After attending Dayton University and the University of Cincinnati, Walters began a successful career owning and managing hotels in several cities. He moved to Dallas in the mid-1970s after acquiring the Executive Inn and later the Le Baron Hotel.

In Dallas, Walters was active in St. Rita's Catholic Community and was generous to many Catholic charities, including Our Lady of Perpetual Help and The Catholic Foundation. He valued faith, education and hard work and wanted to help others fulfill their dreams by obtaining a faith-based education.

After Walters' death in 2006, trustees of his estate wanted to honor his legacy by establishing the scholarship fund. Russell Williams, a trustee and a personal friend of Walters, said his friend impacted many people's lives during his lifetime, and the new scholarships continue that generosity.

The 65-year-old Our Lady of Perpetual Help Catholic School, located in the Love Field area of Dallas, was the perfect choice. With the gift, The Catholic Foundation, in partnership with the Children's Education Fund, is able to provide a Catholic education for many deserving children from a low-income area of the city. The Walters Fund furthers a major priority of the Foundation, supporting Catholic education through grants and scholarships.

"Education is a way to change your life and your circumstances," Williams said. "The schools Ron supported were in less-privileged areas. I know that he would be most proud of this scholarship fund in his name."

To learn more about how you can support scholarships or other aspects of Catholic education, please contact The Catholic Foundation at 972-661-9792.



WORK OF HEART AWARD

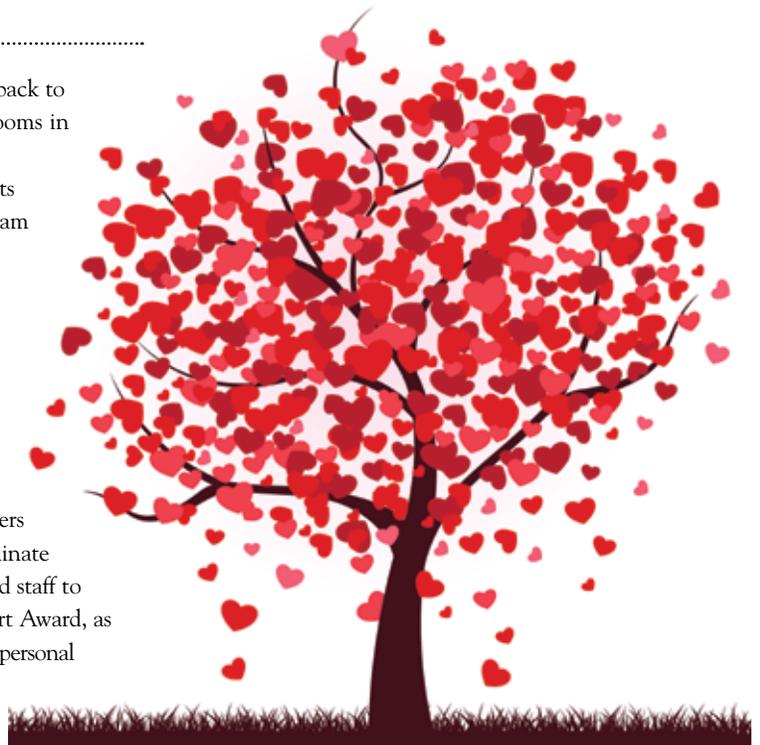
As youngsters headed back to Catholic school classrooms in August, The Catholic Foundation launched its seventh year of a program to recognize Catholic school employees for their hard work and commitment to their students, schools and communities.

Students, teachers, administrators, parents and community members are encouraged to nominate deserving educators and staff to receive a Work of Heart Award, as well as a \$500 grant for personal use, in appreciation of their contributions.

Work of Heart Awards were originally granted from a designated fund established by an anonymous donor and maintained by the Foundation. Awards, which are determined by a special committee comprised of Catholic Foundation Advisory Council members, recognize traditional merit including tenure and leadership, acts of kindness or charity, Christian example, mentoring and simply going the extra mile for an individual student, family or the community. As the original donors wished, the awards are often presented at all school masses or events. Past recipients include teachers, principals, coaches, counselors, administrative assistants, a chaplain, maintenance persons and bus drivers.

"The Catholic Foundation is eager to recognize these deserving individuals for the impact they are making on the lives and education of our children," said Ed Schaffler, president and CEO. "We invite anyone interested in supporting this effort to make contributions to the Work of Heart Award Fund."

To nominate a candidate for the Work of Heart Award, please visit the Foundation's website at www.catholicfoundation.com/serving for instructions.



MURAL UNVEILING

Visitors to the Dallas Arts District will soon have new outdoor art to contemplate, when The Catholic Foundation unveils the winner of the sixth annual Catholic Foundation Plaza Artists Competition.

The winning mural – 28 feet by 10 feet – will be displayed for approximately one year in The Catholic Foundation Plaza, located on the grounds of the historic Cathedral Shrine of the Virgin of Guadalupe, at the corner of Crockett and Flora streets directly across from the Morton H. Meyerson Symphony Center. The 2011 winner will replace last year's selection, "Downtown Playground," by J. Lynn Kelly.

The winning artist, who will receive a \$2,500 stipend, is selected by a panel of respected members

of the local arts community. The Plaza was built through gifts from donors to The Catholic Foundation in recognition of its 50th anniversary six years ago.

Everyone is invited to attend this year's unveiling ceremony in the Plaza at 5:00 p.m. on Thursday, October 13, 2011.



1. 2006 *Celebrate Life* - Marty Ray
2. 2007 *Trumpeting Angel* - Ann Gantz
3. 2008 *Magic Carpet* - Pamela Nelson
4. 2009 *Music On Parade* - David Zvanut
5. 2010 *Downtown Playground* - J. Lynn Kelly

RUBYS HEAD DINNER COMMITTEE



Len Ruby and his wife, Peggy, will chair The Catholic Foundation's Annual Award Dinner on Friday, February 10, 2012, at the InterContinental Dallas.

Len, who served on the Foundation's board of trustees for nine years and was chairman in 2007-2008, says he and Peggy are honored to steer the event that will recognize Sister Margaret Ann Moser of Ursuline Academy. Len and Peggy are the fourth couple to serve as chairs of the event.

"The dinner is a very significant gathering of Catholics to honor good works," he says. "We look forward to working with the dinner committee and staff of The Catholic Foundation to make the evening a memorable celebration of philanthropy and service throughout the Diocese."

To pre-reserve your table at the 2012 Annual Award Dinner, please call 972-661-9792 or visit our website.

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Sister Margaret Ann

(continued from page 1)

expansion and improvements, including the addition of the Jane Neuhoff Athletic Center and the Ursuline Center for Performing Arts. Most recently, she has directed the Academy through a \$22 million campus renewal, including construction of The French Family Science, Math, and Technology Center and new music building, as well as growth in endowments for scholarship and faculty.

But perhaps Sister Margaret Ann's greatest legacy will be what she hopes each Ursuline graduate takes with her – spiritual

growth, academic accomplishment, and a lifelong commitment to service.

"We want each young woman graduate to possess self-confidence, to know who she is and her relationship with God," Sister Margaret Ann said. "*Serviam* – I will serve – is a core value. We teach our students to become builders of community and prepare them for leadership in a global society."

Sister Margaret Ann is currently a member of the Catholic Housing Initiative Board, Sisters of Our Lady of Charity Advisory Board, and the Ursuline Academy of New Orleans Board of Trustees. She is a former member of the boards of St. Alcuin

Montessori School, Dallas, and Duchene Academy of the Sacred Heart, Houston. She feels privileged to have introduced members of the Ursuline community to the missions of other service organizations such as Catholic Charities and Our Friends Place Transitional Living Center.

"I have truly been inspired by the work of The Catholic Foundation in support of Catholic education, healing ministries, and outreach to the underserved," said Sister Margaret Ann. "I am humbled by this honor, and share this award with all who carry forward the mission of the Catholic Church in Dallas." 🙏

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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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For additional information regarding the Foundation, please call 972-661-9792 or refer to www.catholicfoundation.com



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