

THE Good Word

Pass it on: PHILANTHROPY IS A FAMILY VALUE

The late Raymond Nasher, developer, philanthropist, and art collector extraordinaire, would talk about art every day for a few minutes on WRR 101.1 FM, the city's classical music station.

What's striking about what he conveyed in these short interviews – beyond the deeply intimate knowledge of his art and its artists – is the premium he placed on taking care of his family. "Our first priority," he said, including his late wife, Patsy, in the vision, "was to educate our children." The listener would drive along with a fresh sense of the man's values: Family and Education, then Commerce, Art, and Service to the Public.

These values constitute human capital, capital of the sort that philanthropists and money managers sometimes neglect. We tend to forget that our net worth, that which we pass on to the next generation –



through our families and/or charities – is only part of our wealth. It is our human capital – our intelligence, faith, humanity, integrity, service to others, investment in high ideals or noble causes, and work with

children to impart important values – which in fact constitutes the bulk of our riches, no matter what the bottom line. These Family Values define and shape the truest legacies.

The Catholic Foundation helps families translate these very important legacies into meaningful philanthropy. Because of your strong personal values, you may know you want to give some of your money to charity every year and that you wish to leave even more to charity when you die. But you may not know the best way to do so. You may not know which charities are financially sound and effective; and you may want help balancing your commitments to family, business, friends, and charities; you may want to make sure your children understand the importance and the impact of your work; and you'd like to take advantage of

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THE PRESIDENT'S LETTER



Welcome to Dallas, Bishop Kevin J. Farrell! And welcome to The Catholic Foundation!

As the new bishop of the Diocese of Dallas, you have a place at our table. (The bishop serves as a member of the Foundation's board of trustees.) We welcome your voice and perspective, your prayers and counsel, and the time and talents you will share to help us realize our mission, which is, of course, to promote Christian philanthropy and thus provide a permanent source of funding to meet the needs of the people of our community.

We have been blessed by the service of your predecessor, Bishop Charles V. Grahmann. He has presided over unprecedented growth in the Diocese of Dallas, growth which inspired, encouraged, and compelled the Foundation to expand services to our donors and increase our grant-making capacity.

During Bishop Grahmann's tenure, the Foundation's Unrestricted Fund provided more than \$18 million to Diocesan endeavors and institutions. And our donors' individual funds contributed additional support. As Diocese and Foundation, our pasts are deeply, richly entwined and we are excited to invest, with you, in our future.

As you may know, this past year, we celebrated the Foundation's 50th Anniversary and developed a new Strategic Plan to advance our mission. So welcome aboard! We have good works to do in the name of our Lord and Savior Jesus Christ.

EDWIN M. SCHAFFLER

A Strong FOUNDATION

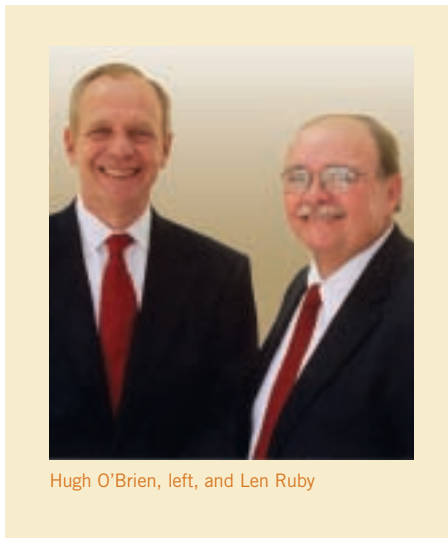
LEN RUBY NAMED CHAIRMAN

Len Ruby has been elected to a two-year term as Chairman of the Board of Trustees of The Catholic Foundation. A retired executive vice president with Interstate Batteries, Ruby has served as a Foundation Trustee for five years, the last two as Vice-Chairman, and before that, as chairman of the Development Committee.

“Len is very upbeat. He’s a good motivator, and a good business person,” says Hugh O’Brien, whom Ruby succeeds. “And he’s well-versed in the works (of the Foundation) throughout the Diocese.”

Ruby notes that contributions to the Foundation have been at record levels for the past three years, thanks to the work of his predecessor, but that the total available for charitable distribution “still falls short of the needs of the Diocese.” His goal, then, is to work with the trustees and staff to attract even more donors and more dollars capitalizing on the Foundation’s well-developed focus on donor services.

O’Brien called “outstanding collaboration” among trustees, the staff, and the advisory



Hugh O'Brien, left, and Len Ruby

council the hallmark of his tenure as chairman of the Foundation, and cited two major accomplishments. “We raised our profile in the community,” he says, “with a very impactful 50th anniversary celebration. And we undertook the development of a strategic plan that revitalizes the Foundation and positions us to capitalize on the changing philanthropic environment.

“It was great fun,” he notes. “I’d do it again in a second, because you can help make a real difference in the community.” ■

ADVISORY COUNCIL

The Catholic Foundation has a unique team of advisors, coaches, ambassadors, and advocates who serve to enhance the profile, visibility, and services of the Foundation.

These 75 men and women, recognized for many diverse contributions to the Catholic community and their professional expertise, are members of the Foundation’s Advisory Council.

Established in 2003, the Advisory Council is chaired by Foundation Trustee Lydia Novakov, who notes that members are “extremely generous with their good ideas and support. They are also very helpful at getting people to understand what a community foundation is and how it functions to advance good works,” she says.

Ed Schaffler, The Catholic Foundation’s President and CEO adds, “In many ways, the service of these professionals and community leaders on the Advisory Council functions as an endorsement of the Foundation’s work, and we are most grateful for this contribution.” ■

THE VOICE AND HEART OF THE FOUNDATION



Mary Griggs, left, and Virginia Dominguez

Mary Griggs is the voice of The Catholic Foundation. And Mary and Virginia Dominguez together are its heart.

Even if you’ve never met these two women face-to-face, if you’ve ever phoned the Foundation offices or worked on a

grant request sometime in the last 15 years (!), you know who they are. And you know how warmly, knowledgeably, and generously they treat everyone who crosses their path.

“They’re terrific to work with,” says immediate past chairman of the trustees Hugh O’Brien. “They’re multi-talented, on top of everything, and they are great representatives of the Foundation.”

“They exemplify ‘public relations,’” adds Hal Tehan, the Foundation’s former Executive Director and Development Director. “Both of them are well-endowed with cordiality and well-versed in every aspect of the Foundation.”

Despite their specific job titles (Mary is the Executive Administrative Assistant and Receptionist and Virginia is the Development Administrative Assistant, but also serves a grantmaking role in charge of grants and donor relations), the two serve myriad constituencies – the trustees, donors, executive staff, prospective donors, and grant applicants – and, according to Foundation President Ed Schaffler, they do so not only efficiently, but with a “wonderful personal touch.”

So say “Hello” next time you call the Foundation and join in our chorus of appreciation for their service.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour,
Vice President of Development

Q How exactly does a legacy work?

A The best answer we have at The Catholic Foundation is that it works the way *you* want it to. Each legacy we help shape bears the highly individual and personal imprint of the philanthropist who makes it possible. It is sculpted from his or her life, life's work, faith and values, commitment to the community, and generosity. It works, most often, to provide an enduring gift that works to fulfill his or her vision of what-might-be.

Technically, a legacy gift to the Foundation begins during a donor's lifetime, with the establishment of a fund in his or her name which is used for specific charitable purposes of the donor's choosing. At the same time, a new relationship develops between the Foundation and the donor – one of shared vision and trust, one that is fostered through communication, education, and the common enterprise of serving the community. The donor may learn from the Foundation more of what's needed in the community; the Foundation will learn how the donor thinks it's best to address those needs.

Over time, this personal philanthropy will begin to define the legacy – in terms of dollars contributed and agencies and people served, and the Foundation will offer a variety of ways, consistent with the donor's estate planning, to make the work enduring. A donor's children may join in the relationship as well. Ultimately, the fund becomes a permanent endowment in the family's name which, guided by the donor's actions throughout his or her lifetime, the Foundation administers to fulfill the donor's lasting legacy.

You can read about the legacy established with the Foundation by Catherine and Charles Schulze, Jr. in the two adjacent columns. And please call us at 972.661.9792 if we can help you Leave a Legacy.

LEAVE A LEGACY:

The Legacy of Catherine and Charles Schulze, Jr.



Catherine and Charles Schulze, Jr.

The legacy of Catherine and Charles Schulze, Jr. probably began to take shape in their childhoods. They no doubt absorbed as children the lessons of civic engagement (Charles' parents helped found the City of Irving, Texas), and the values of Catholic education (Charles attended Holy Trinity and St. Edward's University and Catherine, Ursuline Academy and Loyola University).

Throughout their 66-year marriage, they were active in civic affairs. Charles served two terms on the Irving City Council in the 1950's and was instrumental in the establishment of a home-rule charter there which promoted the city's rapid growth and prosperity.

They served their parish church and the Diocese of Dallas equally faithfully. Both were members of the Equestrian Order of the Holy Sepulchre, Catherine was a Trustee of The Catholic Foundation, and Charles, a 40-year member of the Serra Club of Dallas, was also a founding member of the University of Dallas Serra Club.

They gave generously of their time and talent – and of their treasure – to St. Luke's Catholic Church in Irving, the University of Dallas, Ursuline Academy, St. Edward's and Loyola. These commitments and this focus on Catholic education began to define their legacy.

In 1994, the Schulzes formally established their legacy with a charitable trust at the Foundation. The trust, which provided income to them while they were alive, is now The Catholic Foundation's Catherine O'Connell and Charles Schulze Endowment Fund. It is used, in accordance with the values, priorities, and philanthropy demonstrated by the Schulzes, to provide scholarships for needy Catholic high school and college students in the Diocese. The family's long-time support for Catholic education endures because Catherine and Charles so thoughtfully and generously created their legacy. They spent their lives in service to others, and the Foundation now serves in their names. ■

Pass it on

(Continued from page 1)

the optimal tax savings so as to have, ultimately, more money to give.

Fortunately, that's what we do at The Catholic Foundation. And, as a Catholic Foundation, enriched as we have been by the faith of our founders and donors, we are particularly well-equipped to process human capital – to give meaning to the values our philanthropists embrace. Throughout the last 50 years, we have helped our donors direct their charitable contributions in the way their hearts are leading them: to schools, hospitals, churches, the arts, civic institutions, and the poor.

We invite you to give us a call. Bring your children, too, if you'd like. Let's talk about your shared values and how best to act on them. Let's shape a philanthropic vision that is true to your work, your values, and your hope for the world. Let our experts help you navigate the intricacies of the tax code and the challenges of charitable needs. And let us put that priceless human capital to work in the world. ■

A LIGHT On

The Significance of Large Grants – Million Dollar Grants

The Catholic Foundation makes very few million-dollar grants – only three, in fact, in its first 50 years. In every case, the cause was so compelling, according to Foundation President Ed Schaffler, the vision so important to the Diocese, and the impact so far-reaching that the Trustees agreed to such a large, long-term commitment.

The third of these grants, a \$1 million gift to John Paul II High School in Plano, was completed earlier this year. At stake was a new, Catholic, coeducational college preparatory school that would enable the Diocese to serve its growing population north of Dallas.

According to Beverly Kleckner, the school's executive director of advancement, it's no exaggeration at all to suggest the 500 students enrolled in their second year at



Bishop Lynch Performing Arts Center



John Paul II High School in Plano

John Paul II High School wouldn't be there today, but for the generous grant from The Catholic Foundation. It was a leadership gift, she says, one that made their vision a

*“Our role is the same
whether it's a grant for \$100
or \$1 million; we are
stewards of our donors'
philanthropic intentions.”*

– ED SCHAFFLER

reality. “We are so grateful,” she added, describing the converted Alcatel headquarters building which is now a fabulous high-tech classroom facility.

Previously, a \$1 million grant was awarded to Bishop Lynch High School in 2000 for the construction of The Catholic Foundation Performing Arts Center, which will provide a fine arts venue for the students of Bishop Lynch as well as the greater community for years to come. The Foundation also granted \$1 million to The Next Generation

Campaign in 1993, \$850,000 of which was awarded as seed money for The Bishop Grahmann Education Trust Fund to assist children throughout the Diocese.

“The significance of these particularly large gifts from the Foundation is less about the dollar amount than it is about our mission – which is to help meet the needs of the people of the Diocese,” Schaffler says. “Our donors trust us to be aware of these needs, to have the ability to assess the needs, and the knowledge of how to address them through the most effective charitable and nonprofit agencies and organizations.”



The Next Generation Campaign

Our role is the same whether it's a grant for \$100 or \$1 million; we are stewards of our donors' philanthropic intentions. At the same time, we feel we have been fortunate to be both an effective and generous resource for some of the Diocese's most compelling initiatives in recent years.” ■

The 2007 CATHOLIC FOUNDATION Award Dinner

Jan Collmer received The Catholic Foundation Award on February 13, 2007 at the Westin Galleria with over 550 people in attendance.



Left to right: Chairman, Len Ruby; Suzanne Collmer, Jan Collmer (award recipient), and Ed Schaffler, President and CEO.



Grant recipient Theresa Francis, Principal, Notre Dame School of Dallas, and Len Ruby, Chairman.



Len Ruby presenting the 2007 Catholic Foundation Award to Jan Collmer.



Catholic Foundation Scholarship Recipient Scott Palmer, Jesuit College Preparatory School, with his parents Steve and Margaret Palmer.

THE GOOD ADVISOR



A new advisor newsletter, called *The Good Advisor*, has been created by the Development team of The Catholic Foundation to keep legal, financial, and estate

planning professionals informed about Foundation services and philanthropic opportunities their clients may want to explore. The new quarterly publication was mailed to lawyers, accountants and financial advisors to enhance awareness of the Foundation and to invite professionals to partner with us to effect their client's charitable objectives. "When an individual is planning for the future and executing a new business plan or revising an estate plan," notes Vice President of Development Cheryl Mansour, "it is often an opportune time to think about his or her charitable legacy, too. We like to remind the financial and estate planning professionals that the Foundation is particularly well-equipped to work with them throughout the process and to help them help their clients realize their philanthropic objectives." ■

A MATTER OF ART

The second annual Catholic Foundation Plaza art contest planning is underway: The Catholic Foundation will soon issue a call for entries to artists across the community. As judged by a distinguished panel of local artists, the winning work of art will be installed on the Plaza for the year 2007-2008. The Plaza, a gift of The Catholic Foundation to the people of Dallas, is located in the center of the City's Arts District, at the corner of Flora and Crockett streets (on the grounds of the Cathedral Santuario de Guadalupe). For additional information about deadlines and design format, call Ed Schaffler at 972-661-9792. ■

CAN YOU HEAR ME NOW?



Andy Stern, Chairman and CEO of Sunwest Communications, was the featured speaker at the March 7th Catholic Community Network meeting. He asked the question "Can You Hear Me Now?" to address the importance of communications and crisis management strategies within a nonprofit organization.

Advising participants to consistently communicate the organization's mission to its various constituencies as often as possible,

he advocated the use of both printed and all other forms of communication, including websites and blogs which, he said, provide a more immediate form of responsiveness. He also said it was "absolutely necessary" for all nonprofits to have a crisis communication plan in place, and that all employees should know who is the designated spokesperson and that a statement will be issued if a crisis develops. ■

MAKING A GIFT FROM YOUR IRA

The Pension Protection Act of 2006 provides the option, for people aged 70 1/2 and older, to distribute up to \$100,000 from their Individual Retirement Accounts (IRAs) directly to a qualifying charity this year *without* counting the donated money as personal income and thus not incurring personal income taxes on it.

While Pension Protection Act of 2006 contributions *cannot* accrue to Donor Advised Funds, Support Foundations or other private foundations, they can be accommodated in The Catholic Foundation's general endowment funds and distributed to charitable entities of the donor's choosing in the donor's name. Please consult with your professional advisors and call us if we can help you with this unique charitable giving opportunity. ■

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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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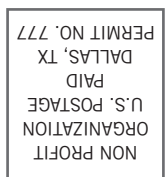
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