

# THE Good Word

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## The Joy of Philanthropy: Pass it On

The philanthropy gene. Do you have one? Have you passed it on?

Is the urge to give back something you are born with? Or is it a sensibility one can acquire? Is it an art form that can be taught?

In other words, how does it happen that people are – or are not – philanthropic? And, for our purposes, as The Catholic Foundation, what can we do to encourage and nurture that gift?

Most people learn about philanthropy through important relationships. Chief among these is the parent-child relationship, where the parent or grandparent, serves as the model, teaching by example.

Similarly, a key relationship with other adults may forge the philanthropic frame of mind – teachers, priests, bosses, mentors, in-laws, and friends all have the same

opportunity to lead by example, to share their commitment to giving back, and to suggest one's responsibility to the larger community.

It may be more serendipitous. Perhaps a relative leaves you a small inheritance from his or her estate, and you learn that, in addition, the relative has also left a bequest to establish a fund at The Catholic Foundation to provide scholarship assistance to needy students. In savoring your gift, you come to appreciate the impact of the other gift, and you begin to understand the concept of a meaningful legacy. The seed is planted.

Finally, we're told, some people become philanthropists via their relationship with the world, and their ultimate need to balance their success with finding their place and defining their purpose.



If you are reading this newsletter, you are probably a philanthropist already, one of our essential partners in supporting our Catholic and other important community causes. You may be a parent who is teaching the next generation about giving back, or an executive at a values-driven company, or  
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### THE PRESIDENT'S LETTER



We were very excited to have such a large gathering for the 26th annual Catholic Foundation Award Dinner last February. The record attendance was gratifying and a wonderful statement by the community that it is supportive of the Foundation's work. We are very thankful.

Bishop Farrell's remarks were extremely energizing and gave everyone who heard him encouragement to help make a difference in our Catholic community. His acknowledgement of his role as our spiritual leader and the many challenges he faces were especially impactful when he added that he will depend on the laity to help meet the financial needs of our Diocese. The Catholic Foundation can be an important source of support for him and can have even more impact with your financial support.

Our honoree, our dinner chairpersons and The Catholic Foundation's many donors are examples of the laity supporting our Catholic community

and making a difference. In the case of Oliver McGonigle, we have to ask ourselves where would Bishop Lynch High School, Bishop Dunne Catholic School and the little community in Tijuana, Mexico be without his volunteerism. Our dinner chairs, T.V. and Lou Ann Mangelsdorf helped make the 2008 Award Dinner the largest ever with their efforts. Finally, the many Catholic Foundation donors combined to make \$4 million in contributions to the Catholic community from their donor advised funds in 2007.

Indeed, we can all make our Diocese a better place by working together as a team under Bishop Farrell's leadership. The Catholic Foundation is pleased to be a part of that team. Join up!

*Edwin M. Schaffler*  
EDWIN M. SCHAFFLER

# A Strong FOUNDATION

Board President Len C. Ruby welcomed four new trustees to the board of The Catholic Foundation in January.

Thomas W. Codd, Jr., a partner at Price-waterhouseCoopers, LLP, has previously shared his accounting expertise as Chairman of the Board of the Dallas Zoological Society. He is a member of the boards of the American Ireland Fund and Circle 10/Boy Scouts of America, and he sits on the Finance Council of St. Rita's Catholic Church. Tom says he believes the mission of The Catholic Foundation "fits in with what Shelly and I continuously try to teach our children in terms of service to the community and the importance of philanthropy."

Jennifer Staubach Gates is a mother of two and an active volunteer at St. Rita and Ursuline Academy. She also serves on the boards of the Ursuline Foundation and Camp Summit, where she is chairing a capital campaign. Previously a member of The Catholic Foundation Advisory Council, she knows first-hand how the Foundation's support impacts the Catholic community, and she embraces the Foundation's dual missions – service to the community and development of meaningful legacies for donors.

Thomas W. Horton is Chief Financial Officer and Executive Vice President of Finance and Planning at AMR Corp., the parent company of American Airlines. A member of Christ the King Parish, Tom also serves on the Executive Board of Cox School of Business at Southern Methodist University and is a member of the Baylor Foundation Board of Directors at Baylor University.

Charles (Chuck) Kobdich, a practicing attorney with McCall Parkhurst and Horton LLP, was also a member of The Catholic Foundation Advisory Council who wished to be even more involved with the mission of the Foundation. He has served as President of North Dallas Shared Ministries, The Notre Dame School of Dallas, and the Serra Club of Dallas. Chuck is a member of St. Rita Parish.

In addition to Len Ruby, the 2008 officers of the Foundation Board are: Robin P. Hartmann, Vice Chairman; Joseph Coleman, Secretary; Mike Thompson, Chair of the Development Committee; Thomas Merkel, Chair of the Audit and Administration Committee; Donald Hanratty, Chair of the Distribution Committee; and Kathy Muldoon, Chair of the Investment Committee.



Left to right: Thomas W. Horton, Thomas W. Codd, Jr., Jennifer Staubach Gates and G. Charles (Chuck) Kobdich

Former Chairman of the Board, Hugh O'Brien, who was instrumental in the development of the Foundation's ambitious Strategic Plan, and Trustee Lydia Novakov, who chaired the Foundation's 50th Anniversary celebrations, retired from the Board at the end of the year, having fulfilled their terms. "We will miss their generous vision and diligent leadership," said Len Ruby. "Both Hugh and Lydia have set the highest standards of service to our donors and to our community, and we thank them for their extraordinary service." Lydia will continue to chair the Foundation's Advisory Council. 🙏

## In Memoriam: Reuben D. Martinez



The Catholic Foundation mourns the loss of Trustee Reuben D. Martinez, a true "man for others," in the Jesuit tradition which, along with his loving family, was so important to him.

Mr. Martinez died May 9, 2008. He had recently retired as the President and Chief Executive Officer of El Fenix restaurants, founded by his father, Mike Martinez, Sr.,

the city's pioneer in Tex-Mex cuisine. In addition to building the restaurant chain, Reuben actively supported the Jesuit College Preparatory School, Ursuline Academy, the Dallas Historical Society, the Dallas Opera,

Dallas Museum of Art, Dallas Theater Center, Visiting Nurses Association Meals on Wheels, the restoration of the Cathedral Shrine of the Virgin of Guadalupe, and the expansion of the Autism Treatment Center.

"Dallas has lost a creative force, a legendary restaurateur and remarkable community servant. Reuben was named a Trustee in 2006 and The Catholic Foundation was enriched by his energetic presence on the Board, the Distribution and the Development Committees. We are all honored to have known and partnered with him in philanthropy that supports our Catholic community" said Len Ruby, Chairman of the Board of The Catholic Foundation. "We extend our deepest sympathy to his family."

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

Estate planning using a charitable trust to distribute your wealth and establish your charitable legacy sounds highly sophisticated. And it is. But it is precisely this complexity that makes a trust a particularly useful vehicle for individuals with unique and sometimes equally complicated personal and charitable goals.

Because The Catholic Foundation is in the business of helping our donors achieve these goals, we can assist donors in establishing a trust, making the process as easy as any other philanthropic act. Working with you and your professional advisors, we can help you determine the kind of charitable trust that best suits your needs. If you have the vision, we have the expertise.

Charitable trusts can provide both for charity and for your spouse and/or heirs. And depending on their structure, they may create significant benefits in terms of income tax deduction, reduced estate taxes and capital gains taxes, and supplemental income from assets.

The two main types of charitable trusts are Charitable Remainder Trusts and Charitable Lead Trusts. Both involve a gift of assets to The Catholic Foundation to establish a charitable trust.

A Charitable Remainder Trust initially provides for an income stream to accrue from the assets of the trust to the donor and/or the donor's heirs. It can be a fixed annual amount established by the terms of the trust (a Charitable Remainder Annuity Trust) or a percentage of the assets in the trust

(a Charitable Remainder Unitrust). Upon the death of the last beneficiary, the trust is dissolved and the remainder of the assets can be used to establish a charitable fund at The Catholic Foundation (named to support a specific charity or type of charitable work as designated by the donor) or added to the Foundation's Unrestricted Endowment Fund and distributed in accordance with the Foundation's charitable mission.

A Charitable Lead Trust generates income for a charity and then transfers the assets to others. The donor transfers cash or property irrevocably to a trust, creating an income stream to The Catholic Foundation for the Unrestricted Endowment Fund or to a Donor-Advised or Designated Fund at the Foundation for a certain number of years. At the end of that period, the principle reverts back to the donor or the donor's dependents or heirs.

Charitable trusts can be used to optimize the timing of gifts to heirs and gifts to charity, to capitalize on the estate, income, generation-skipping and capital gains tax benefits, and to fulfill important commitments to family and philanthropy.

Please call me if we can provide further information about charitable trusts or help you achieve the charitable objectives of your estate planning.

## DONOR PROFILE:

*Kay and Jim Hogan*



It's the knowledge that their money is going to do the most good possible for people who need it that fundamentally motivates Kay and Jim Hogan to give to charity through the resources of The Catholic Foundation.

Members of St. Mark the Evangelist Parish in Plano, they first became aware of The Catholic Foundation at a small party given in a friend's home several years ago. They learned of several different ways the Foundation could help them realize some of their charitable goals. Then they began to notice, says Kay, that wherever they went in the Dallas area, The Catholic Foundation had a presence and was helping the churches, schools and other Diocesan organizations they cared about. As a result, they decided to work with The Catholic Foundation to give back to their community. "It is clear they do so much for everybody," she notes. "They support so many worthwhile causes."

After Jim retired from United Parcel Service – where he was a District Manager in Dallas until 1983 – the Hogans established a Charitable Remainder Trust with The Catholic Foundation. When they placed their charitable dollars in a trust administered by the Foundation, they targeted a current return from the trust that provides an income stream for the rest of their lives. Their future return is the knowledge that when the trust dissolves upon their death, these same assets will be used to generate support for The Catholic Foundation's charitable works and Mount St. Joseph Academy in Flourtown, Pennsylvania, in perpetuity. "It just seems like a very good idea," says Kay.

The Hogans give often and give generously, and with the Charitable Remainder Trust, their contributions will continue to have an impact on their legacy long after they're gone. Like most Catholic Foundation philanthropists, the Hogans have taught their children (six daughters) to appreciate the benefits of giving back to the community. In fact, Kay proudly reports that two of their daughters have their own Donor Advised Funds at the Foundation. 🐣

# A LIGHT *On*

## FOUNDATION AWARDS \$594,925 IN GRANTS

The Catholic Foundation's founding visionaries foresaw a need to support the people and ministries of the growing Catholic Diocese with funding for expenses that fall outside the normal operating budgets of these entities. Today's Foundation leaders envision a time when the Foundation can meet all of these needs. For now, the Foundation utilizes a thorough grants process, balancing the needs across the Diocese as it distributes funds.

This spring, the trustees awarded \$594,925 from the Foundation's Unrestricted Endowment Fund. The 20 recipients included:

- St. Augustine School – \$60,000 to replace the roof and floor of the gymnasium
- Ursuline Academy – \$50,000 for construction of the Science, Math & Technology Center
- St. Mary's Parish in Sherman – \$45,000 for pews for St. Anne's Church
- Holy Family of Nazareth Parish – \$45,000 to replace the HVAC system and renovate restrooms
- Bishop Dunne Catholic School – \$44,000 to update the fire monitoring system
- Sacred Heart of Jesus Chinese Parish – \$40,000 toward construction of a multi-purpose building, including a parish hall and rectory
- St. Elizabeth Catholic School – \$35,000 to update technology labs
- The Highlands School – \$35,000 for improvements to the access road and parking lot
- St. Monica School – \$30,000 to update the middle school science labs
- St. Paul the Apostle School – \$30,000 for an outdoor pavilion and benches
- John Paul II High School – \$25,000 to redesign the school website to include an alumni component
- The Pines Catholic Camp – \$25,000 toward a Master Plan for the campgrounds



Left to right: The Pines Catholic Camp; St. Augustine School; Sacred Heart of Jesus Chinese Parish

- St. Thomas Aquinas School – \$25,000 toward the renovation of the upper school restrooms
  - University of Dallas – \$25,000 to replace the laboratory exhaust fans
  - St. John School in Ennis – \$20,000 to update the computer lab
  - La Promesa Foundation/Guadalupe Radio Network – \$20,000 to update broadcasting equipment
  - Literacy Instruction for Texas (LIFT) – \$10,925 to provide English as a Second Language instruction (ESL) for two parishes
  - Notre Dame School – \$10,000 to update computers and software
  - Vitae Caring Foundation – \$10,000 to support a pro-life TV advertising campaign in the DFW market
  - St. Francis Catholic Church in Lancaster – \$10,000 for assistance with the clerestory windows in the new chapel
- Extending the reach of the Foundation's support this spring were grants awarded from Foundation Endowment funds and/or Donor-Advised funds. These included:
- \$30,000 from the Catholic Foundation's Senior Citizens Fund to the Diocesan Ministry to Persons with Disabilities to provide automatic door openers in selected parishes
  - \$25,000 from the Emma Louise Buhrer Endowment Fund for the Fall 2008 Work of Heart Program in Catholic Schools
  - \$16,500 from the Jane and Henry Neuhoff Fund of the Catholic Foundation for the Refugee Outreach Program of St. Patrick's

Church and \$3,000 to assist the St. Vincent de Paul Thrift Store with the purchase of a truck

- \$5,618 from the R. Cardis and Grace DeLee Stubbs Foundation to develop a technology and training plan for the Grand Prairie Wellness Center and \$1,422 to Catholic Charities for veterans' assistance.

"It is gratifying to touch so many lives in the Diocese in such meaningful ways through the work done by our churches and schools and other organizations," says Ed Schaffler, President of The Catholic Foundation. "We salute our visionary founders and our generous donors for making this possible." 🐟

## *Joy of Philanthropy*

*(continued from page 1)*

a friend who shares the joy of making a difference in the lives of others. Your relationships are key to the growth and nurturing of the philanthropic instinct. And we hope your knowledge of The Catholic Foundation will help you spread the word.

At The Catholic Foundation, we are dedicated to fulfilling the commitment that defines our relationship with the Catholic community, building stronger relationships with our donors and, with your help, creating meaningful relationships with prospective donors. Together, we can grow the resources available to our community and empower philanthropy to make a difference in our world. 🐟

# Record-Breaking Crowd Honors 2008 Foundation Award Winner

Foundation Trustees honored J. Oliver McGonigle with the 2008 Catholic Foundation Award for outstanding volunteer and philanthropic leadership. He has done exceptional work for the Bishop Lynch and Bishop Dunne schools in Dallas and the Santa Rosa School in Tijuana, Mexico. Grants in the amount of \$5,000 each were awarded to Bishop Lynch and Bishop Dunne in honor of Mr. McGonigle's service to both schools.

It was a record-breaking Annual Award dinner for The Catholic Foundation, with 850 people in attendance – the most successful in its history. Dallas' new Bishop, The Most Rev. Kevin J. Farrell, gave eloquent thanks to the audience and to everyone who has helped make The Catholic Foundation one of the best resources of its kind in the American Catholic church.

With gentle humor and obvious affection for his new home Diocese, Bishop Farrell explained

how rapid growth of the Diocese creates an exponential growth in needs, which the Foundation helps to meet. He emphasized his gratitude for the Foundation's vision and commitment, and looks forward to working with the Foundation throughout his tenure.

An additional highlight of the evening was the presentation of The Catholic Foundation Scholar Award to James E. Newby V of Bishop Lynch High School. 🦋



Len C. Ruby, Chairman of the Board of The Catholic Foundation, Edwin M. Schaffler, President and CEO of The Catholic Foundation, and J. Oliver McGonigle, 2008 Catholic Foundation Awardee



James Newby V of Bishop Lynch High School and winner of The Catholic Foundation Scholars Award with parents, Karen and James Newby IV and sister Christine



The Most Rev. Kevin J. Farrell, Bishop of the Diocese of Dallas and J. Oliver McGonigle



Lou Ann and TV Mangelsdorf, 2008 Award Dinner Chairmen



Michael George, Senior Development Officer of The Catholic Foundation and Robert Mackey



Carlos and Regina Fonts with Sister Adelaide and the Nuns from St. Joseph's Residence

## New Website Serves Donors, Community

Have a question about a Donor Advised Fund at The Catholic Foundation?

- Would you like to apply for a grant?
- Are you a professional advisor in need of information for a client?
- Need information about the next Catholic Community Network meeting?

Log on to [www.catholicfoundation.com](http://www.catholicfoundation.com)

Virtually all of the services of The Catholic Foundation can now be accessed online, according to Cheryl Mansour, Vice President for Development, who oversaw the re-design and enhancement of the website.

The website is constructed around three sections based on the Foundation's mission statement: one for GIVING; one for SERVING; and one for LEARNING.



"Fundamentally, the website is designed for our donors, prospective donors and professional advisors," says Cheryl. "It serves an important secondary purpose – to teach the community about The Catholic Foundation's unique mission and myriad contributions, and to invite people to share in the power of philanthropy. We believe the Foundation makes giving easy; with this website, giving is now even easier."

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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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Or faxed to 972-661-0140.  
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