

# THE Good Word

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## THE STRENGTH OF A FOUNDATION *Yesterday, Today, and Tomorrow*

Perhaps Bishop Kevin J. Farrell said it best during his remarks at the Foundation's Annual Award Dinner. "The Catholic Foundation is certainly the answer in the Catholic Church for many of the difficulties we find ourselves in today.

"Had there not been a Catholic Foundation," he continued, "I would have had to start one."

Instead, when the bishop arrived in Dallas a little over a year ago, he found a well-established and trusted organization he – as head of one of the fastest growing dioceses in the country – counts on to help, by his count, hundreds of thousands of people.

The 2009 Catholic Foundation Award winner, Marianne Staubach, echoed the bishop's confidence. "When you give money to The Catholic Foundation, you know it will be well-spent with prayerful and careful consideration."

And Chairman of the Board of Trustees Robin P. Hartmann, says it yet another way. "The Foundation is the primary philanthropic resource of the Diocese of Dallas. We have not curtailed our grants. I am confident we will be able to meet whatever challenges the future may bring."

This confidence and trust fuel the essential charitable vehicle The Catholic Foundation has become and, with our generous donors, empower its good works throughout the community. It is this trust and confidence in the Foundation and its relentless commitment to serving the community that build our endowments, fund our grants, and attract new donors to our mission – in good times and bad. It is, in fact, the very nature of a community foundation that it be a dependable, constant force for good, a secure, stable repository for philanthropic contributions, and an accessible source



of funding for those in need, no matter what the state of the economy at any given time.

While the Foundation is not immune to the challenges to our economy, because we are  
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### THE PRESIDENT'S LETTER



I don't know about you – but in these uncertain times, I sometimes feel like a child in the back seat of the car on a family trip. "Are we there yet?" What patience my parents must have had!

The other thing I always wanted to know was "What's the plan? Where are we going? How are we going to get there?" Again, not uncommon questions for these unusually challenging times.

In fact, as the Foundation began planning for 2009, we asked those same questions of ourselves. Our goal was clear: to meet the financial needs of the Diocese. But how to get there amongst the economic turmoil, how to build on the Foundation's stability and growth in a period of instability and decline was, indeed, a challenge.

And yet, the answer was the same as it has always been, as it was more than 50 years ago, when the Foundation was first established. The answer is you—our donors and supporters.

Thus this year's plan has been carefully calibrated to ensure that, as the leading philanthropic resource of the Diocese, we continue to serve our donors with the very highest levels of professional expertise, knowledge of the community, creativity, and integrity. It is more important than ever that we serve our donors – and prospective donors – by educating them both about the many different needs and the variety of ways they can help support the people and institutions of this Diocese, even in these difficult times. We need to celebrate those who share their abundance every day,

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# A Strong FOUNDATION



## FOUR NEW TRUSTEES JOIN FOUNDATION BOARD

Four new trustees have been named to three-year terms on the Board of The Catholic Foundation. They are: O.D. (Dan) Cruse, who retired from the executive search consulting firm, Spencer Stuart, where he served as Vice Chairman of the firm and Partner in Charge of the Dallas office; John R. Kraft, who established the State Farm Insurance Agency in Plano; Victoria P. Lattner, a Certified Public Accountant who previously served as Vice President of Finance at Southwest Media Corporation; and David M. Rosenberg, a senior partner in the law firm of Thompson & Knight, L.L.P.

In addition to their professional responsibilities, each new trustee has also been active in his or her parish life and the Catholic schools, and has taken leadership roles in a number of civic causes and organizations, including The Crystal Charity Ball, Catholic Charities, the Dallas Symphony Orchestra, Ronald McDonald House, ChildCareGroup, the Plano Chamber of Commerce, and the University of Dallas.

New trustee Dan Cruse says his admiration and respect for founding trustees Ed Maher and Tom Unis, among others, inspires his service to the Diocese. He considers the Board's work "a gigantic responsibility we need to live up to and pay close attention to."

John Kraft brings a special interest in education in the Diocese to the table. "I look

forward to representing an organization that has a history of providing the cornerstone funding for schools like John Paul II, and making a difference on a daily basis for schools like Our Lady of Perpetual Help." Of his role on the Board he says, "I hope to use my sales and marketing background to increase the awareness and value of The Catholic Foundation in the Plano area."

Board Chairman Robin P. Hartmann welcomed the new members, noting "The Foundation benefits, as do the people we serve, from the diverse expertise and experience of our trustees. We are most grateful for these four new trustees and their commitment to the people and the institutions of the Diocese of Dallas and the charitable intentions of our donors."

In addition to Mr. Hartmann, the 2009 officers of the Foundation Board of Trustees are: Thomas E. Merkel, Vice Chairman; David A. Small, Secretary; G. Charles (Chuck) Kobdich, Chair of the Development Committee; Thomas W. Codd, Jr., Chair of the Audit and Administration Committee; Jennifer Staubach Gates, Chair of the Distribution Committee; and Kathy Muldoon, Chair of the Investment Committee. 🐡

Top: New Trustees (Left to Right) O.D. (Dan) Cruse, Victoria P. Lattner, John R. Kraft, David M. Rosenberg with Board Chairman, Robin P. Hartmann

## The Strength of a Foundation

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stewards of our donors' philanthropic visions, our funds are invested very prudently.

In addition, we have been blessed by an increase in contributions to the Foundation this past year, in part thanks to today's faithful donors and in part as a result of generous estate planning developed years ago.

Still, the projected need for funding in the Diocese outpaces the Foundation's grant resources almost two-to-one. Despite an awareness that these needs are greater than ever, prospective donors with charitable intentions might not be prompted to act right now, given the level of economic uncertainty. This is when confidence and trust in the Foundation come into play again, and where the Foundation's ability to help donors create meaningful charitable legacies using a full range of philanthropic and estate planning tools can make a real difference in our ability to continue to serve the community at a consistent level.

As Ed Schaffler, President of the Foundation, states, "People don't need to worry about, or forget what they can do tomorrow because of economic conditions today; we can help them fulfill their philanthropic vision in any number of ways that are not dependent on today's dollars or today's market values." A bequest, donor advised or designated funds, and several types of trusts and/or annuities can be established now with the Foundation, without going into effect for years, or decades. At the same time, such gifts make clear the donor's charitable intentions, build the Foundation's resources for the future, and keep our promise to the Catholic community that we will continue to meet its needs.

Just as the Diocese depends upon the Foundation's support, especially when times are tough, the Foundation depends upon our donors' generous charitable instincts. Our philanthropic tools are creative, trustworthy, and effective, and we welcome the opportunity to facilitate your charitable gifts to the community. 🐡

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

Sometimes it's hard to know where to start. You know you need to update your will. You realize you probably need a more complete estate plan. In an environment that has brought our financial institutions to the brink, you are keenly aware of your own personal charitable instincts. Your family is growing and changing; your business has grown and changed; and for all the time and energy and resources you have devoted to both throughout your lifetime, you haven't really planned effectively for the future.

There is, as the sayings goes, no time like the present.

You can start with a phone call to The Catholic Foundation. Our philanthropic professionals will recommend another call or two – to your legal and financial advisors. Then, together, you and your team of professional advisors can develop and plan your legacy by defining how you provide for your family and/or your business, and for your community.

You don't have a lawyer, or a financial

planner, or an accountant? The Catholic Foundation works with local estate planning professionals across the disciplines and can provide a list of referrals. With good counsel and careful planning you can achieve your personal goals with any number of creative, flexible, and effective tools, including – but not limited to – outright bequests, trusts, and charitable gift annuities.

Please call us at The Catholic Foundation today. 🐟

## TAKING CARE OF BUSINESS

When Charles (Chuck) Kobdich and his wife, Ellen, decided it was time to update their wills recently, they met with an estate lawyer, a financial planner, and Michael George of The Catholic Foundation.

Their objective was to create an estate plan that would take care of their heirs and effect their philanthropic goals – without compromising either. “It's an estate plan,” says Mr. Kobdich, a partner in the law firm McCall, Parkhurst & Horton L.L.P., “that happens to have a charitable aspect to it. It's not just a charitable plan. That's why you need your lawyer and financial planner to work with the Foundation.”

For Chuck and Ellen Kobdich, the plan involves using the assets of their estate to create two new trusts. New life insurance policies were used to establish a separate asset replacement trust. Existing assets went into a Charitable Remainder Unitrust at The

Catholic Foundation. Upon the death of the second of the spouses, the first trust matures and proceeds from the life insurance policies benefit the three Kobdich children. At this same time, (when the second spouse dies), the Charitable Remainder Unitrust – which is also intended to provide post-retirement income to the couple – matures into a fund which the Foundation will primarily use to support four specific charities: Catholic schools, the Notre Dame School of Dallas, Fisher House (which provides support to military families), and Sacred Heart Catholic Church in Mt. Vernon, Texas.

“We are all going to die sometime,” Chuck Kobdich says. “The question is what happens



Ellen and Charles Kobdich

to your assets at that time. Creating an estate plan that fulfills your charitable desires and provides for your heirs takes some work. But when it's all done, you feel really good. You've taken care of business.” 🐟

# A LIGHT On

## TEACHERS WITH “HEART” WIN \$5000 AWARDS

*“She is a dedicated, kind, devoted Christian role model for our students.”*

While this one sentence was written to recommend one specific nominee, it applies equally to each of the three winners of \$5,000 grants from the Foundation’s Work of Heart program this year, indeed to most of the program’s nominees. That’s what the Work of Heart is all about.

Here’s more of what was written about each of the winners:

*“Mrs. Clem does unexpected acts of kindness.”*

*“Mrs. Perry is an inspiration whether she wins this award or not, but knowing that she knows we care about her would be a wonderful thing. She deserves the accolades.”*

*“I admire Miss Noller for being a young person in our society, giving the gift of her time to infants, toddlers, and teenagers.”*

The Work of Heart Award is a unique program created in partnership with The Catholic Foundation by an anonymous donor who sought to recognize the teachers, administrators and staff of Catholic lower, middle, and high schools in the Diocese of Dallas with grants ranging from \$500 to \$5,000 for exemplary service. This year, with the family’s continued support along with a grant from The Catholic Foundation’s Unrestricted Fund, recognition of Catholic school employees can be continued with \$100,000 in awards.

The three largest awards (\$5,000 each) were given to Christina Clem, principal of St. Elizabeth of Hungary Catholic School; Vanessa Perry, first grade teacher, St. Patrick School in Dallas; and Joanne Noller, teacher and director of Bishop Dunne Catholic School’s Early Childhood Center. In each case, their job titles are, however, just part of the story of their outstanding work in the schools.

Christina Clem, for example, is considered an “angel” by the many families in her school she has helped during hard times. They write of her



Ed Schaffler, President The Catholic Foundation with Joanne Noller, center front, Teacher and Director of Bishop Dunne Catholic School’s Early Childhood Center

daily prayers and her tenacious assistance with finances, food, scholarship support, and keeping their children in Catholic schools. She has also been singled out for advancing technology at St. Elizabeth, for building community within the school population with grade-level pot-luck suppers, and for her thoughtful, caring ways with students and staff alike.

Vanessa Perry isn’t just a first grade teacher, either. She is every child’s favorite teacher, a woman who has brought extraordinary energy and good cheer into the classroom every day for years. According to the parents of St. Patrick



Vanessa Perry with her class at St. Patrick School in Dallas

School, she has consistently taught their children patience, humor, a love of reading, the dignity of differences, and her deep Catholic faith – remarkable gifts made even more compelling by the recent, unexpected death of her husband.

Joanna Noller already has two jobs at Bishop Dunne – director of the school’s Early Childhood Center and 6th grade “World Cultures” teacher – but she’s always taking on something more. She mentors and trains other teachers and child care providers; she opens the childcare center to teachers’ children during after-school meetings; and she coaches two girls’ volleyball teams. In doing so, her colleagues say, she is an exemplary role model, living out her dream of teaching Catholic values and making a difference in the lives of others.

Nominations for Work of Heart awards can be submitted to The Catholic Foundation ([workofheart@catholicfoundation.com](mailto:workofheart@catholicfoundation.com)) throughout the year. To sustain the awards program, The Foundation has established the Work of Heart Designated Fund and is seeking additional contributions. For further information, please contact [lscheets@catholicfoundation.com](mailto:lscheets@catholicfoundation.com). 🐟

# THE CATHOLIC FOUNDATION ANNUAL AWARD DINNER

February 12, 2009

A gala celebration! A record-breaking crowd of 1100, honoring Marianne Staubach, whom Bishop Kevin J. Farrell called “a modern-day prophet of how we should live, all of us, in our lives on this earth,” and the woman Foundation Trustee and Staubach daughter Jennifer Gates calls “Mom.” A \$10,000 Foundation grant, in Marianne Staubach’s honor and at her request, to Catholic Charities. And a prayer and a love song sung by Walter Johnson. A grand social occasion celebrating the good works of the Foundation in the Diocese. 🌟



1. Ed Schaffler (President of The Catholic Foundation), Marianne Staubach, and Rob Hartmann (Chairman of the Board of Trustees)

2. The Staubach family (Jeff Staubach, Michelle Staubach Grimes, Roger and Marianne Staubach, Stephanie Staubach Phillips, and Jennifer Staubach Gates) with Ed Schaffler (not pictured, daughter, Amy Staubach Mentgen)

3. Charlie and Liz Tusa, Dinner Chairmen

4. Sister Mary Anne Owens (Executive Director, Catholic Charities) and Rob Hartmann

5. Accepting The Catholic Foundation 2009 Scholars Award, Victoria Ehlinger, Bishop Lynch High School

6. Walter Johnson (Director of Students, Bishop Dunne Catholic School), sings the *Our Father* for the benediction

7. Jeff, Marianne, and Roger Staubach with Bishop Farrell

8. Marianne Staubach and daughter, Jennifer Staubach Gates



## THE PRESIDENT’S LETTER *(continued from page 1)*

and help others create meaningful legacies from the assets they will have accumulated years, or even decades from now. We will underscore the importance of every contribution, no matter its size, to the Foundation, and the power of the good works we are able to claim by combining our charitable resources.

Are we there yet? No. But the Foundation has a plan and the full commitment of every trustee and our entire staff. And we invite you to join us,

especially now, in these uncertain times, to plan for that which is certain – your ability to make a difference in the lives of those in need – and use our time-tested philanthropic tools to build your legacy.

EDWIN M. SCHAFFLER

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