



THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

“The Catholic community in the United States has in fact made education one of its highest priorities.”

– Pope Benedict XVI



In a world filled with uncertainties and shifting values, Catholic education prepares young men and women for the future with the academic foundation they’ll need as well as the spiritual and moral bedrock essential for challenging times.

Parents recognize what makes Catholic schools different and often sacrifice to provide a Catholic education experience for their children. To make that task a little easier – and to help support Catholic schools in the Diocese – each year The

Catholic Foundation supports Catholic education and scholarship programs from the Unrestricted Endowment Fund and Designated Scholarship Funds established by individual donors.

The scholarship programs of the Foundation address many different constituencies. For the past ten years one very special scholarship program has been The Catholic Foundation Scholars Award which was presented to Lauren Marsan, a junior at Bishop Lynch High School (see page 5). This is an award presented to an

outstanding junior year student in a Catholic high school within the Diocese. The competition is always very keen.

The Foundation also supports our Catholic school teachers and administrators with a special scholarship program aimed at assisting with tuition for their children attending a Catholic high school in the Diocese. Additionally the elementary schools are assisted with a grant to the Children’s Education Fund which provides financial assistance to nearly 400 Catholic school students in the Diocese.

(continued on page 4)

THE PRESIDENT’S LETTER



The Catholic Foundation completed its fifty-fifth year in 2011. Over those many years the Foundation has touched and supported virtually every aspect of the great works going on within our Diocese. In fact, we recently looked back over the grantmaking history of the Foundation and the recipients are in the thousands and total grants exceed \$65 million. We think that’s an impressive number.

As we all know there is always a story behind the numbers and The Catholic Foundation is no exception. The story behind the grant total of over \$65 million are the many donors and supporters of the Foundation who have helped build up the Foundation through outright gifts or bequests to the Unrestricted Endowment Fund or through the establishment of Donor Advised Funds and Endowments. The most recent example of this type of

charitable community building is the seventeen grants recently made by the Foundation of over \$879,000. These grants came from both the Unrestricted Endowment Fund and donor established funds and would not have been possible without the fifty-five years of accumulated generosity of donors to The Catholic Foundation. We should all be very grateful to them for their commitment to our Catholic community through the Foundation.

One of my favorite sayings is “alone one can do good things. Together we can do great things.” Our generous donors have helped The Catholic Foundation and its many grant recipients do great things. We would love to help everyone become a part of doing great things through the Foundation.

EDWIN M. SCHAFFLER

A Strong FOUNDATION

NEW TRUSTEES JOIN BOARD

“To serve an organization that is committed to the entire Diocese is a unique opportunity.”

– JIM BURKE

Two new trustees have been named to three-year terms on the Board of Trustees of The Catholic Foundation. They are Jim Burke, CEO of TXU Energy, and John R. Landon, founder and CEO of Landon Homes. In addition, Thomas E. Merkel, senior vice president of investments at Merrill Lynch in Dallas, will serve as chairman of the Board.

Burke, who has led TXU through significant changes in the largest competitive electric market in the country, is an active member of Christ the King Parish, serving as president of the Parish Finance Council. He is a graduate of Tulane University with a bachelor's degree in economics and an MBA and is a licensed certified public accountant and a chartered financial analyst.

Burke says that it is an honor to serve on the board. “To be able to serve an organization that is committed to the entire Diocese is a unique opportunity, and I look forward to working alongside others to see that this mission is fulfilled for generations to come.”

Landon is a member of the Prince of Peace Catholic community, where he has been active in both parish and school. He also served on Ursuline Academy's “Facing the Future” building campaign and as a youth coach for basketball and football. Landon graduated from

Louisiana State University with a bachelor's degree in accounting. Landon says he is proud to have been chosen to serve. “I hope my business experience will make me a good steward of the Foundation and to assist in the many good causes they support in the Dallas Catholic community.”

Merkel joined the Foundation board in 2001 and previously served as chairman of the Investment Committee and chairman of the Audit and Administration Committee. He has served as a member of the Christ the King School Advisory Board and chaired its 2009 annual fund. Merkel is a member of the Ursuline Academy Finance Committee and served on the Major Gifts Committee. He is a graduate of the University of North Carolina.

As chairman, Merkel succeeds Robin P. Hartmann, who joined the board in 2005 and became chairman in 2009. “We are grateful to Rob for his dedication and commitment to the mission of The Catholic Foundation,” says Foundation President Ed Schaffler. “Under his leadership, the Foundation helped meet the needs of the Catholic community during challenging economic times.”

Other Board officers through 2011 are Alan D. Bell, vice chairman and chair of the Investment Committee; Jennifer Staubach Gates, secretary; David B. Woodyard, chair of the Development Committee; David M. Rosenberg, chair of the Audit and Administration Committee; and Thomas W. Codd, Jr., chair of the Distribution Committee. 🐟



Left to Right: Jim Burke, Trustee; Thomas E. Merkel, Chairman and Trustee; John R. Landon, Trustee

IN MEMORIAM:

Charles O'Neill Galvin



Charles Galvin

In January, The Catholic Foundation lost one of its earliest friends with the death of Charles O'Neill Galvin, a prominent Dallas law professor and leader in many Catholic organizations.

Dr. Galvin served as chairman of the board of trustees from 1963 to 1966. He and his wife, Peggy, received The Catholic Foundation Award in 1998 for outstanding service to the charitable, educational and evangelical needs of the Diocese of Dallas. He was a member of St. Rita Catholic Church, the Serra Club of Dallas and the Knights of Columbus, and was a Knight Grand Commander of the Order of the Holy Sepulcher. He also served as a trustee of Catholic Charities of Dallas.

With law degrees from Northwestern University and Harvard University, Dr. Galvin was known for his love of the law and teaching it to young men and women. In 1952, he joined the faculty of what is now Southern Methodist University's Dedman School of Law and served as dean from 1963 to 1978. After teaching at several law schools, including Duke University and Vanderbilt University, in 1993 he returned to Dallas, where he was of counsel to Haynes and Boone.

“Dr. Galvin was a great supporter of The Catholic Foundation. He knew the value of the Foundation to the Catholic Diocese of Dallas and was very proud of its success and his role in helping it become established. He was a presence and will be missed by all of us,” said Ed Schaffler, President of The Catholic Foundation. 🐟

Giving SPIRIT

“We know the money will be used wisely.”

HOWARD AND MARY MANNING, DONORS

Semi-retirement is rewarding for Howard and Mary Manning. Howard, who still consults in the banking industry, and Mary, retired from telecommunications and real estate, enjoy resort living in a village called Four Seasons, near Lake of the Ozarks in Missouri.

Although the couple left North Texas in 2006, they maintain strong ties to the area through their Donor Advised Fund at The Catholic Foundation, where Mary served on the Board of Trustees. Being involved with the Foundation was part of their life in the Dallas-area Catholic community, along with joining Prince of Peace Catholic Church in Plano with their three children, and Howard's service on the investment advisory board of Aquinas Investment Advisers, Inc.

Shortly after moving to Plano in 1996, the Mannings became acquainted with the Foundation and decided to establish their Donor Advised Fund as an alternative to giving to charitable organizations directly. “We like the fact that the Foundation handles the record-keeping and processes the gifts,” Howard says, “and we like the ability to recommend gifts anonymously.”



Howard and Mary Manning

Even more important, the Mannings appreciate the knowledge of the community offered by the professional staff of the Foundation. “People at the Foundation share ideas of where we can recommend gifts consistent with our philosophy. They link us to deserving organizations where we know the money will be used wisely to make a difference for those they serve.”

The Mannings' Donor Advised Fund has grown, and now, from 500 miles away, they continue to use it to support Catholic schools and other organizations. And they hope to continue the tradition in their family. “We plan to help our children establish their own Donor Advised Fund at The Catholic Foundation so they can participate actively in their own philanthropy.”



Giving 101

by Cheryl Unis Mansour, Vice President of Development

You're probably putting away your records for filing your federal income tax return for 2010, and next year's taxes may be the last thing on your mind. But it's never too early to start planning for the year ahead.

On December 17, 2010, President Obama signed into law the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010. In addition to extending the Bush tax cuts, the 2010 Tax Relief Act contains significant changes in gift and estate taxes and creates opportunities for charitable giving. Among other things, it:

- Extended tax-free distributions of up to \$100,000 for individuals over age 70½ from IRAs for charitable purposes in 2011.
- Revived the estate tax for decedents dying after December 31, 2009, setting a maximum estate tax rate of 35 percent and an exclusion amount of \$5 million. These provisions are scheduled to end Dec. 31, 2012.
- Eliminated the modified carryover basis rules for calculating the value of property in an estate and replaces them with the stepped up basis rule that had applied until 2010.

- Continued application for donors of lifetime gifts to apply the annual gift tax exclusion before having to use part of their applicable exclusion amount. For 2010-2011, that inflation-adjusted annual exclusion amount is \$13,000 per donee (married couples may continue to “split” their gift and may make combined gifts of \$26,000 to each donee).

Because these and other provisions in the 2010 Tax Relief/Job Creation Act are due to expire in the short term, we will continue to face uncertainty when it comes to estate planning. What will the new law be after the temporary fix ends? Periodic reviews are an important part of meeting retirement and estate planning goals. At The Catholic Foundation, we always encourage our donors and potential donors to consult with their professional advisors. That way, you can keep your estate plans up to date and ensure that assets go exactly where you want them to go – to family, other heirs and the charities of your choice.

We welcome the opportunity to sit down with you and visit about how to make charitable giving part of your estate plan.

A LIGHT On

GRANTS HELP AREA SCHOOLS

Seventeen Dallas-area Catholic schools and other organizations will renovate their facilities, expand, replace equipment and assist students with tuition, thanks to \$897,483 in grants from The Catholic Foundation this spring.

Among the grants announced by Foundation trustees April 27 is an award to the Diocesan Catholic Schools Office to fund "Mission of Excellence for Catholic Schools," a strategic plan that will impact all 31 Diocesan grade schools, examining them to ensure their growth and sustainability. The outcome of this program will assist the Diocese in exploring ways to make Catholic education affordable and accessible to all parts of the Catholic community.



Our Lady of Perpetual Help Early Childhood Education

The grants were made from the Foundation's Unrestricted Endowment Fund and from funds designated for support of religious, educational and charitable programs and associations in the Diocese of Dallas. They were made possible by the gifts of Foundation donors, past and present, in support of the mission – to promote compassionate charitable giving that serves the needs of the entire Catholic community.

Meeting twice a year, the Distribution Committee of the Board of Trustees reviews grant applications and recommends that grants be awarded to those agencies and orga-

nizations that can best serve the physical and spiritual needs of the Catholic community.

Several grants will help churches and schools improve or maintain property. Good Shepherd Catholic School will replace its roof, All Saints Catholic Church will install a new sound system, Christ the King Catholic Church will construct a new parish center and Epiphany Mission will paint the church interior and exterior and install new cabinets in the sacristy. Our Lady of Perpetual Help School will renovate and improve its kitchen, cafeteria and student restrooms, and Redemptoris Mater Missionary Seminary will replace its air conditioning and heating system.

Other grants support repair of the courtyard at St. Augustine Catholic Church, renovation of the girls' restroom at Holy Trinity School, and installation of new fire alarm systems at St. Bernard of Clairvaux Catholic School and at St. Philip the Apostle Catholic School.

Grants from restricted and designated funds to provide tuition assistance for the 2011-2012 school year were made to Holy Family of Nazareth School, St. Luke Catholic School and St. Philip the Apostle Catholic School. Funding from the Foundation will also help purchase furniture for the Sacred Heart of Jesus Christ Vietnamese Parish meeting rooms and social center, make possible curriculum updates at St. Luke Catholic School, purchase new textbooks and classroom resource materials at Santa Clara of Assisi Catholic Academy and support the Catholic Charities "Together We Learn" program of the Zero to Five Funders' Collaborative. Grants from two restricted funds will support the Phase II building expansion at St. Joseph's Residence, a retirement home for the elderly in Oak Cliff.

"For more than 55 years, the Foundation has been able to provide funding to programs and causes within our Diocese and beyond, including over \$65 million in grants during the last 25 years," says Ed Schaffler, president and CEO of The Catholic Foundation. "It's a privilege to help fund the programs that allow so many organizations to continue enriching our communities through their excellent educational, religious and charitable work."



St. Bernard of Clairvaux Catholic School

Scholarships *(continued from page 1)*

Catholic Foundation donors are also an important source of financial aid. The Foundation is the home for twenty-three donor established designated scholarship funds. The purposes of the funds are varied. For example, The Ronald F. Walters Fund is directing financial assistance to families of children attending one of the inner-city Catholic schools. The Alameel Ursuline Academy Scholarship Fund supports a Hispanic student at Ursuline, The Mary Elizabeth Betz Memorial Fund benefits a nursing student and The Winnifred C. Wilkins Memorial Scholarship Fund assists seminarians at Holy Trinity Seminary.

These are just a few examples of the type of scholarship funds which have been created by education minded donors and administered by The Catholic Foundation. A common way to establish a scholarship fund is through one's estate plan, but some donors prefer to see the results of their generosity during their lifetimes and also enjoy getting to know the recipients of the scholarships. Our professional staff will work with donors to establish scholarship funds that will benefit education now and continue their legacy after they are gone.

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

The CATHOLIC FOUNDATION ANNUAL AWARD DINNER

February 11, 2011

1. Thomas E. Merkel, chairman of The Catholic Foundation Board of Trustees; Mary Templeton, 2011 Catholic Foundation Award recipient; and Ed Schaffler, president and CEO of The Catholic Foundation, gather as Templeton accepts the 29th Annual Catholic Foundation Award on February 11 at the InterContinental Dallas. The event is a celebration of philanthropy in the Dallas community and honored Templeton for her contributions to education and various local organizations.

2. Thomas Poore, president of John Paul II High School (JPIIHS), and Thomas E. Merkel, chairman of The Catholic Foundation Board of Trustees, 2011 Award recipient Mary Templeton, Most Reverend Bishop Kevin J. Farrell, D.D.

3. Ed Schaffler, president of The Catholic Foundation thanks Bob and Colleen Baillargeon, Chairmen of the 2011 Award Dinner.

4. Lauren Marsan, the 2011 Catholic Foundation Scholar and Bishop Lynch High School junior.



Mark Perkins Speaks to Catholic Community Network



Ed Schaffler; Cheryl Mansour; Annette Gonzales-Taylor, Communications Director, Diocese of Dallas; and Mark Perkins

Nonprofit organizations who are careful about their visual appearance in print, online and elsewhere, are truly saying something meaningful about themselves. That was the message of Mark Perkins, a principal of SullivanPerkins, a Dallas advertising and design firm, who spoke at the April meeting of the Catholic Community Network.

“When you know your values, as nonprofits generally do, your branding grows out of those values – your visual branding is an expression of what you stand for,” Perkins said. He explained that visual branding is not simply a logo. It includes all design elements – logo, color, typography, how photography and illustration are handled and the visual spirit of all materials, printed or otherwise. It is most important for a nonprofit to portray itself consistently, because consistency earns loyalty.

And Catholicism is one of the most branded of religions – from the cross to nuns’ habits to the website of the Holy See, Perkins said.

Through Catholic Community Network, The Catholic Foundation provides regular educational and networking programs for benefactors and ministry leadership in the Dallas diocesan community. To receive our e-mails, contact virginia@catholicfoundation.com.

Dr. Albert Niemi Gives Economic Forecast at Advisory Council Breakfast



Dr. Albert Niemi, dean of the Southern Methodist University Edwin L. Cox School of Business, addressed The Catholic Foundation Advisory Council during its annual meeting. Dr. Niemi was the keynote speaker during the event held on May 5, and provided Council members valuable insight on our nation’s economic future. His presentation focused on factors that have contributed to the nation’s current economic climate: jobs, the housing market and consumer spending.

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