

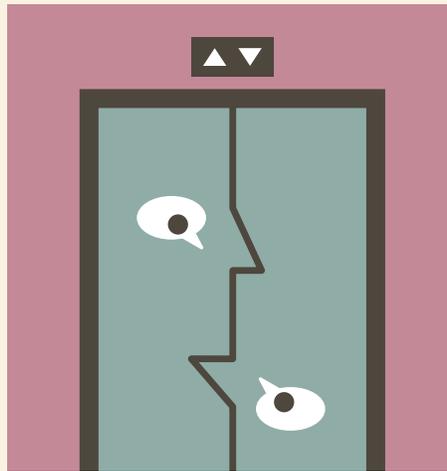
THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

What exactly is The Catholic Foundation?

The term “elevator speech” is common nowadays. Business people, entrepreneurs, job seekers – all are encouraged to quickly and simply define what they do in a pitch no longer than an elevator ride. Less formal than a mission statement, a good elevator speech captures one’s attention quickly and delivers a winning message to potential clients.

Along with other community foundations, The Catholic Foundation has faced a special challenge in explaining – briefly – what it does. “Our trustees and advisors have detailed knowledge of Catholic Foundation activities,” says Ed Schaffler, president and CEO. “But when they’re asked in a casual setting about what the Foundation does, the challenge is, where to start to describe the work of an organization that reaches so broadly into the community?”



To make the task a little easier, The Catholic Foundation recently developed several key messages. “We have a great story to tell,” says Schaffler, “and we hope our key messages will help everyone associated with the Foundation respond with confidence the next time someone asks what we do.”

Following are the two key messages:

- The Catholic Foundation is a charity established to receive contributions from donors and to make charitable grants to meet the needs of the Catholic community.
- The Catholic Foundation works with individuals and families interested both in charitable giving today and/or creating their philanthropic legacy that addresses community needs throughout the Catholic community.

Recurring questions come up frequently. “Often we’re asked if The Catholic Foundation is related to the Diocese or to Catholic Charities,” Schaffler says. The Foundation is not part of the Diocese or related to Catholic Charities but rather is an independent 501(c)3 nonprofit organization governed by Catholic laity and managed by a professional staff.

(continued on page 4)

THE PRESIDENT’S LETTER



How often have you asked “What can I do to help?” when you know some sort of help is needed. Many times the answer comes back that everything is under control and no help is needed. When I get that response I am the one who then feels helpless! It is a dilemma for me for sure.

I think the same dilemma exists for many individuals who are charitably minded. They want to provide help but don’t know how they can best provide it. This is when The Catholic Foundation can be a great resource for a donor. It is in the unique position of having a view of the important and unfulfilled needs in our Catholic community. For example, in the grant cycle just completed and which you will read about in this issue, the

Foundation was faced with requests that were three times greater than the funds available. If we could connect a donor to one of these unfulfilled needs we would be helping the donor and the needy organization – and helping to build a better Catholic community.

So, if you are faced with a “charitable dilemma,” a donor advised fund at The Catholic Foundation is a good solution and a great way to answer the question “What can I do to help?”

A handwritten signature in black ink that reads “Edwin M. Schaffler”. The signature is written in a cursive, flowing style.

EDWIN M. SCHAFFLER

A Strong FOUNDATION

NEW TRUSTEES JOIN BOARD

Three new trustees have begun serving three-year terms on the Board of Trustees of The Catholic Foundation. They are Win Bell, president and CEO of Ed Bell Investments; Lawrence Bradley (Brad) Camp, CEO of Wentwood Management, Ltd.; and Monica Herrera, M.D., a pediatrician.

New trustee Win Bell is President and CEO of parent company Ed Bell Investments which owns construction businesses and Auction Source. Win attends St. Rita Parish and is actively involved in the local Catholic community, serving on numerous boards and committees for schools, including Bishop Lynch High School, Jesuit College Prep, Shelton School, the University of Dallas and Ursuline Academy. He is the past board president of Catholic Charities and currently serves on its finance committee. A Dallas resident, Bell earned a bachelor's degree in computer science, electrical engineering and math from Vanderbilt University and a master's degree in computer science from Purdue University.

"The Catholic Foundation helps the entire Catholic community and assists Catholic schools and other Catholic entities with capital improvements and other needs," Bell says. "I've always been interested in the work of the Foundation, and I'm proud to serve on its Board."

Brad Camp, a lifelong Dallas resident, focuses on real estate and finance. Wentwood Management operates and manages office and warehouse space in North Texas. Brad is also chairman of Crestone Development Services and owner of Yancey Camp Companies. He attends Christ the King Parish and serves as president of the advisory council for Our Lady of Perpetual Help School, his alma mater. Camp holds a bachelor's degree in marketing and finance from the University of Oklahoma.

"While The Catholic Foundation helps our entire Catholic community, I think one of their most important roles is helping the



Pictured from left: Tom Merkel, chair of The Catholic Foundation's Board of Trustees, joins new trustees Brad Camp, Dr. Monica Herrera and Win Bell, along with Ed Schaffler, Foundation president and CEO. Camp, Herrera and Bell are the newest members of the Foundation's 2012 Board of Trustees. The new trustees will each serve a three-year term, which began on Jan. 1, 2012.

inner-city Catholic schools," Camp says. "They are crucial to the continued operation of these schools, which remain underfunded and over-serving. I am happy to serve on the Board of Trustees."

Monica Herrera practices at Windhaven Pediatrics, located on the campus of Presbyterian Hospital of Plano, where she has served as chairman of the pediatric department. She has been named "Best Pediatrician in Plano" by the readers of the Plano Star Courier and one of "Texas Super Doctors" by Texas Monthly. She graduated from the Baylor College of Medicine and completed her residency at Texas Children's Hospital in Houston. A resident of Plano, Monica is a member of the Prince of Peace Parish.

"I share a commitment to Catholic education with the Foundation," Herrera says, "and I believe that the tuition assistance we provide to help families send their children to Catholic schools is an investment in the entire family."

Win Bell, Brad Camp and Monica Herrera bring a useful skill set to the Board of Trustees, says Thomas E. Merkel, board chairman. "With backgrounds in technology, medicine and community service, they are a huge addition to the Foundation," he says. "They will help keep the Board fresh, up-to-date and relevant."

In addition to Merkel, the Board is led by the 2012 officers: Tom W. Codd, vice

chairman and chair of the Distribution Committee; Jennifer Staubach Gates, secretary; Lisa Dickson, chair of the Audit and Administration Committee; David B. Woodyard, chair of the Development Committee; Alan D. Bell, chair of the Investment Committee; and David M. Rosenberg, chair of the Governance Committee. 🐟

The Legacy Effect

The nearly 1,300 attendees at The Catholic Foundation's 2012 Annual Awards Dinner in February were treated to a new video, "The Legacy Effect." The two-and-a-half minute video highlights the work of The Catholic Foundation over the 56 years since its founding and the more than \$73 million in grants made to the community. The video tells of John, who gave generously to the Foundation through a planned gift, and in the 34 years since his death, is still helping to improve the lives of those in the Catholic community. To view "The Legacy Effect," please visit www.catholicfoundation.com.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

Giving to The Catholic Foundation can take many forms. Some donors prefer to write a check each year. Others give through their wills or other planned gifts such as charitable remainder trusts or life insurance. One of the most popular – and current – ways to give is through a donor advised fund.

A donor advised fund at The Catholic Foundation provides the optimal flexibility for charitable giving. The donor makes gifts to the fund and remains actively involved by recommending grants to the trustees of the Foundation. Grants are made in the name of the donor advised fund (or anonymously, if the donor prefers) to a qualified charity. Donor advised funds are also a way to involve more than one generation in a family's philanthropy by naming successor(s) to the original advisor. Contributions to the fund may be made at any time in any amount; and similarly, distributions from the fund may be made at any time and in any amount.

Many donors find that a donor advised fund is a great alternative to a private

foundation because The Catholic Foundation handles all administrative functions for the donor. A donor advised fund also offers a number of tax advantages. You can make immediate charitable gifts in the year that best suits your tax planning needs and then recommend grants from the fund over time to the particular charities you support. The Foundation staff is available to help identify deserving nonprofit organizations that are most capable of meeting your charitable objectives.

Grants from donor advised funds, large and small, are making a big impact on the Catholic community and other worthy causes in the Dallas area. The Catholic Foundation manages more than 300 donor advised funds, and grants from those funds accounted for about \$3.5 million of the \$4.7 million in grants awarded in 2011.

To learn more about how The Catholic Foundation can help you create a donor advised fund that meets your objectives, please call us at 972-661-9792.

stay-at-home mom. She is a member of the Knights and Dames of Malta, as well as Serra International, Vocation Guild and Catholic Daughters, and actively volunteers at St. Monica Parish and other Catholic organizations. Marge also serves on the board of the Catholic Pro-Life Committee of North Texas. Her focus currently is a project for priests. Marge says, "The vocation of priesthood is of utmost importance and priests should be prayed for and shown expressions of gratitude." The goal is for each priest to be spiritually adopted by an anonymous "mother" in the diocese who will offer prayer and sacrifice for her "priest son." Adoration cenacles will also be formed throughout the diocese. Word of the project has spread, and with the help of volunteers, the Dallas team will help other dioceses launch similar programs.

*"We find tithing through
The Catholic Foundation
to be joyful and liberating."*

The Giangiulios' philanthropic objectives led them about eight years ago to The Catholic Foundation. After learning more about various giving opportunities, they established a donor advised fund to channel their charitable gifts. Each January, the Giangiulios set aside 10 percent of their gross income from the previous year and donate it to their fund at the Foundation.

"This commitment is taken seriously and we don't let anything interfere with it," says Joe.

Marge adds, "We find that the idea of tithing is joyful and liberating. It takes away all anxiety about giving, especially with having The Catholic Foundation fund which is a wonderful instrument for donating. All you have to do is send an e-mail, and the Foundation sends the check and takes care of the record-keeping. Joe particularly likes that part."

"We used to write so many checks a year to various organizations," Joe says. "Now we can make those gifts through our donor advised fund. I would recommend this form of giving to any of my clients." 🐟



Marge and Joe Giangiulio

MARGE AND JOE GIANGIULIO, DONORS

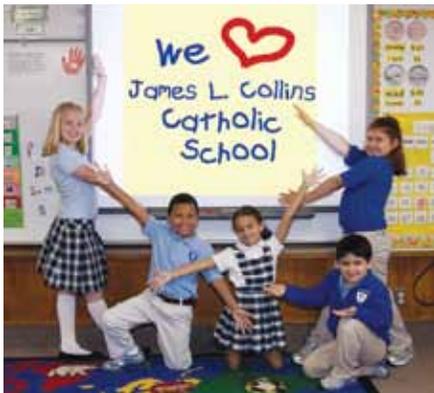
Life is busy for Marge and Joe Giangiulio, transplanted to Dallas during a wave of corporate relocations in the late 1970s. It wasn't until they arrived in Dallas that they met and were subsequently married. Joe, a native Pennsylvanian, is a certified public accountant and certified financial planner. Marge, from Brooklyn, was a vice president of American Airlines until they adopted a child from Romania and she took early retirement to be a

A LIGHT On

TECHNOLOGY WAS A RECURRING THEME FOR THE SPRING GRANT CYCLE

This spring 22 Dallas-area Catholic schools, churches and other organizations received \$697,668 in grants from The Catholic Foundation's Unrestricted Endowment Fund and from funds created by Foundation donors, past and present, in support of the Foundation's mission.

The Distribution Committee of the Board of Trustees meets twice a year to review applications and recommend grants to be awarded to agencies and organizations that can best serve the physical and spiritual needs of the Catholic community.



Students at James L. Collins Catholic School in Corsicana, Texas.

With technology so essential, grants announced by the Foundation will upgrade technology at Holy Family of Nazareth School, provide technology for a new science lab at Mary Immaculate School, upgrade classroom technology at St. Joseph Catholic School in Waxahachie, and purchase interactive technology for grades K-8 at St. Monica School.

At Mount St. Michael Catholic School, an award will update technology and provide a computer on wheels and laptops for teachers, while a grant to St. Thomas Aquinas Catholic Church and School will update the wireless infrastructure and fiber optic backbone. An award to St. Elizabeth of Hungary



Students at St. Monica Catholic School learning updated technology skills.

Catholic School will purchase Apple iPad2s and related equipment for the classrooms.

Another focus of the grant season is to maintain buildings and replace mechanical equipment. Grants will replace the chapel roof and carpet at Sisters of our Lady of Charity, help replace the fire alarm system and the HVAC system in the science and computer labs at James L. Collins Catholic School, and replace the roof on the main building at St. Pius X Catholic School.

With other grants, the Society of St. Vincent de Paul at St. Bernard of Clairvaux Church will purchase a truck for use by the Church's food pantry, St. Joseph Catholic Church in Richardson will replace its HVAC system, St. Augustine Catholic Church and School will replace its asphalt parking lot behind the school with concrete and add four light poles, and St. Mary of Carmel School will replace its HVAC system.

Grants will also help replace the roof over the school and church at Santa Clara Catholic Academy, renovate the sanctuary at St. Philip the Apostle Catholic Church and replace the roof on the church and steeple at St. Ann Church in Kaufman.

Other awards from donor established restricted funds will support tuition assistance at Holy Family of Nazareth School, John Paul II High School and Bishop Dunne Catholic School. A grant to the Zero to Five Funders' Collaborative will support Catholic Charities "Together We Learn" Program, which helps parents to interact with young children. An eight-part video series on the Theology of the Body for college campuses was also funded.

"Through their generosity, donors are helping to improve technology for Catholic schools and maintain school and church buildings, as well as make it possible for more students to have the advantage of a Catholic education," says Ed Schaffler, president and CEO of The Catholic Foundation. "These gifts enhance the lives of so many." 🙏

(continued from page 1)

The Catholic Foundation does provide funding to Catholic Charities and supports virtually every parish, school and ministry in the Diocese as well as many other nonprofit organizations. Founded in 1955, the Foundation manages more than \$125 million in charitable assets. Over the years it has made grants totaling more than \$73 million.

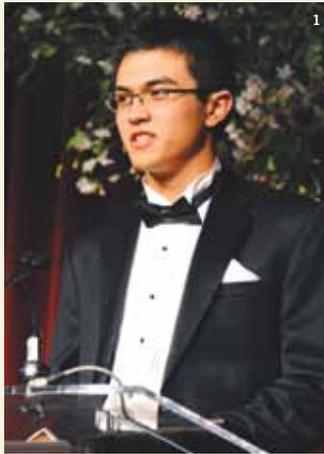
Another question involves donor advised funds. Potential donors ask if their fund is open to support all of their charitable interests, even if they are not Catholic. The answer is yes, as long as the charity and work is aligned with Catholic values and the mission of The Catholic Foundation. Many individuals also ask if they can just simply make a donation in support of the Foundation's work without setting up a fund, and the answer is a resounding yes. The Foundation is continually trying to increase the Unrestricted Endowment Fund and every gift counts no matter how big or small.

To learn more, please visit www.catholicfoundation.com, or call 972-661-9792.

THE CATHOLIC FOUNDATION ANNUAL AWARD DINNER

February 10, 2012

1. The Catholic Foundation Scholars Award was awarded to Paul Kim of Cistercian Preparatory School.
2. Sister Margaret Ann Moser accepts the 30th annual Catholic Foundation Award from Ed Schaffler and Tom Merkel, Chairman of the Board of Trustees.
3. Satin Dolls Jazz Choir of Ursuline Academy opening the evening with "Baba Yetu" - Swahili adaptation of "The Lord's Prayer."
4. Sister Margaret Ann Moser was surprised by the evening's finale – a performance by the Ursuline Academy Rangerette Drill Team.



Art Competition Begins for The Catholic Foundation Plaza

All professional artists living in Texas are eligible to enter the seventh annual Catholic Foundation Plaza Arts Competition. Beginning in October, 2012 the winning work will be displayed in The Catholic Foundation Plaza, located on the grounds of the historical Cathedral Shrine of the Virgin of Guadalupe, for approximately one year. The winner will receive a \$2,500 stipend. Deadline for entries is Thursday, August 30, 2012.

The competition is funded by a gift from The Catholic Foundation in celebration of its 50th anniversary six years ago. For more information and an entry form, please visit www.catholicfoundation.com.

Fifth Annual Advisor Series



Jeffrey Pennell addressed 200 professional advisors at the fifth annual Advisor Series.

Approximately 200 professional advisors attended the fifth annual Advisors Series, a seminar presented by The Catholic Foundation for estate and wealth management professionals. Jeffrey N. Pennell, a law professor at Emory University, Atlanta, spoke on "Wealth Transfer Developments with Practical Significance to Everyday Estate Planning." Attendees earned continuing-education credit at the event. The Foundation would like to thank our Presenting Sponsors, Gardere Wynne Sewell LLP and Carter Financial Management. Patron and

Supporting sponsors included: Allred Capital Management; Haynes and Boone LLP; Locke Lord LLP; Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP; Thompson & Knight LLP; Bisignano & Harrison, LLP; Frost Financial Management Group; Godwin Ronquillo PC; Gruber Hurst Johansen Hail Shank LLP; Larson Allen LLP; Texas Capital Bank; and Travis Wolff.

CALL FOR NOMINATIONS



The Catholic Foundation Award is recognized as the preeminent and most recognized annual award given to an outstanding member of the Dallas Catholic community. Each recipient is selected for their distinguished service to the charitable, educational or evangelical needs of the Diocese of Dallas. The award will be presented at The Catholic Foundation Award Dinner on January 25, 2013. To participate in the nomination process, visit www.catholicfoundation.com/tcf_award_nomination. Nominations must be received by Friday, June 15, 2012.

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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:

The Catholic Foundation
5310 Harvest Hill Rd., #248
Dallas, TX 75230

or faxed to 972-661-0140.

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



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for the
2013 ANNUAL AWARD DINNER
on Friday, January 25, 2013
at Hotel InterContinental
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