

THE Good Word

The Catholic Foundation HONORS

Jan Collmer, an extraordinary volunteer and philanthropist, has been selected to receive the 2007 Catholic Foundation Award in honor of his outstanding leadership in both the Catholic and Greater Dallas communities. Collmer will be honored at the Foundation's annual awards dinner in February.

Jan, also a visionary force in the semiconductor industry, was the founder and president, through 2005, of Collmer Semiconductor (which became High Voltage Power Systems, Inc.). He graduated from Jesuit College Preparatory School in 1952, and received his bachelor's degree in mathematics, with a minor in physics, from the University of Texas at Arlington following service as a fighter pilot in the



Jan Collmer

U.S. Navy. His distinguished and highly successful career in engineering began with Texas Instruments in 1958, and included 18 years with Varo, Inc. in Garland, where he also served as president.

Avocationally, Jan Collmer has two passions, one of them extremely active: he is a professional air show performer – a stunt pilot who flies his FINA Extra 300L all over the country. The second is his commitment to the community, and he credits his parents, who raised him with “very little money in South Dallas,” for that. “My father once gave away an overcoat to a homeless person,” he says. “And my mother gave of herself – her time and energy – all the time.”

More than once, Collmer has married the two passions. He headed the successful development of the Frontiers of Flight Museum at Love Field, which he continues

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THE PRESIDENT'S LETTER



December is a challenge in this business. Not Christmas itself, but sometimes it seems we turn that Holy Night entirely on its head, taking more from the kings and their gifts than from the possibility of new life promised by the infant in the manger.

Why, I wonder, do we spend the entire month of December running around looking for the modern-day equivalents of gold and frankincense and myrrh?

And, let's be honest here — why do charities, even public charities like ours, capitalize on that same impulse (and no small amount of guilt) with massive year-end solicitations for their share of the “gold”?

There are, of course, practical reasons why this happens in the nonprofit world. December 31 is the end of the year for tax accounting purposes and donors seeking charitable tax deductions are, with reason, motivated by that deadline. But while this kind of giving provides dollars that are essential to all charitable missions, both giving out of guilt and giving under the gun at year-end deprive the donor of much of the meaning and satisfaction that can come from a more intentional charitable giving plan.

So I propose an alternative: The Catholic Foundation's “Gift of Giving,” a uniquely individual charitable giving plan we work out for you and with you in consultation with your family and financial and legal advisors. It considers your assets, current and projected estate and income tax implications, and your responsibilities to family and friends, a business and/or the community.

The Catholic Foundation has 50 years of experience and expertise, 50 years of charitable and philanthropic efforts that serve our Catholic community and beyond, 50 years of taking the stress and hassle out of gifting and giving, and 50 years of helping people like you derive joy and satisfaction from your giving. The Gift of Giving is yours. Please call us today.

And, of course, all of us at The Catholic Foundation wish you a blessed Christmas and New Year.

EDWIN M. SCHAFFLER

A Strong FOUNDATION

Five new trustees join board; Four retiring lauded for service

Drawing on the 50th Anniversary theme “Celebrating the Past and Inspiring the Future,” Catholic Foundation Board Chairman Hugh O’Brien announced the election of five new trustees at the board’s December meeting.

Earlier the chairman had expressed his thanks to the board’s four retiring trustees — **Ray Chavez, Tom Hopkins, Nick Kuntz,** and **Brian Mitchell** — each of whom has dedicated nine years of service to the Foundation. He honored them as “difference-makers” and presented them with a cross and a plaque listing all the charities that have received grants during their tenure.

committees and thanked him for his particularly valuable service during the sale of the Aquinas Funds to Luther King Capital Management. He honored Nick Kuntz, the Foundation’s immediate past chairman, for his leadership, and especially for his efforts involving governance, the sale of the Aquinas Funds, and the 50th anniversary celebration. And he expressed his gratitude



Tom Lazo



Nancy McLochlin



Kathy Muldoon



David Small



Mike Thompson

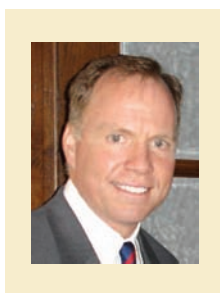
The new trustees are: **Tom Lazo**, President and CEO of Lazo Technologies, Ltd.; **Nancy McLochlin**, a community volunteer; **Kathy Muldoon**, a financial planner with Carter Financial Management; **David Small**, an attorney; and **Mike Thompson**, a First Vice President and Managing Director of The Private Client Group for Merrill Lynch who is retiring at the end of the year. Members of several different parishes, these new trustees have contributed through the Diocese to the Dallas community in a number of different ways, most notably in service with the Knights of Malta, the University of Dallas, Jesuit College Preparatory School, Catholic Charities, Cistercian Preparatory School, and Bishop Dunne Catholic School.

“We are both proud and honored to add these outstanding citizens to The Catholic Foundation board. They bring a rich variety of skills and experience to the table which, when coupled with their demonstrable commitment to our mission, will help us grow and strengthen the Foundation,” O’Brien said.

In personal tributes to each of the retiring trustees, O’Brien thanked Ray Chavez, who served on the Distribution and Development committees, for his technology expertise which was so helpful in determining effective grants and for the many times he introduced prospective donors to the Foundation. He cited Tom Hopkins’ work on the Distribution, Audit, Administration, and Investments

to Deacon Brian Mitchell for sharing two very different skills throughout his tenure: the first, an inspiring opening prayer; and the second, expert evaluation of heating and air conditioning requests made during the grants application process.

Foundation trustees are elected for three-year terms and, according to the by-laws, can serve a maximum of two consecutive terms. 🙏



The Catholic Community Network hosted a seminar on multiple-front fundraising this fall. Brad Cheve (left), the vice president for Development at Southern Methodist University, met with Foundation donors, staff, and friends to discuss how to manage and coordinate development efforts when several different parts of an organization are raising funds at the same time.

He said that for concurrent fundraising for several different purposes to be successful, the effort itself needs to be guided by a single, coherent mission that is consistently communicated to all donors. He also told participants his goal in development is to keep the institution among a donor’s top four charitable priorities.

The Catholic Community Network offers educational and informational programs related to charitable giving throughout the year. To receive notices of future events, please email: virginia@catholicfoundation.com.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

Q Why A Community Foundation?

A I have spent the last 15 years of my career trying — sometimes struggling — to explain exactly what it is we do in community foundations — why we're different from a private foundation, how a donor-advised fund works, the difference between designated, restricted, and unrestricted funds, and the impact of seemingly-arcane changes in IRS regulations and trusts and estate laws.

Now, all of a sudden, I find I rarely have to explain it. Financial institutions across the country have suddenly made charitable foundations almost trendy. Capitalizing on increased wealth at the top of the income brackets, and heightened visibility for the world's most generous philanthropists, like Bill and Melinda Gates and Warren Buffet, several investment houses and banks have rushed to create and promote charitable funds as wise and mindful new investment opportunities. As a result, there's something about these new funds in almost every daily newspaper (and not just the *Wall Street Journal*), a news story here about increased interest in giving to charity, an advertisement there.

This is good news, actually. More charities should be getting more money (and there is certainly no lack of need). And more Americans, already a generous people, are thinking about "Giving Back."

But where does this leave an entity like The Catholic Foundation? Why would someone make a so-called "charitable investment" with us. What is our particular "value added" as a 50-year old, mission-driven foundation?

For me, for all of us at The Catholic Foundation, that word "mission" is the key difference. We have a faith-fueled commitment to serving our brothers and sisters. We recognize that we build our lives and the institutions that support our lives in this diocese on the shoulders of the generous,

visionary individuals who came before us. We accept our responsibility for leaving a strong foundation for the generations to come. We exist in a continuum of shared love and service.

The second distinguishing factor I would claim for The Catholic Foundation is our 50-year history. Experience counts. We know our community. We are closely in touch with its needs. We know our donors. And we understand their needs. We have a well-earned reputation for prudent stewardship, wise investments, and effective grant-making. We have access to professional resources that can make a difference in almost any arena — legal, financial, investment, technical, construction, heating and air conditioning — and these experts are our volunteers.

Another factor that takes us, a community foundation, well beyond any commercial charity fund is this: we make no money on our work that is not ultimately returned to the community. Yes, we have administrative fees, generally based on fund size and complexity. But in addition to not being onerous, these fees ultimately accrue to the Foundation's endowment, or unrestricted funds, for eventual distribution. We're not in the business of making money; we're in the business of serving our donors and their community.

And finally, The Catholic Foundation enhances every single philanthropic gift by using the power of a community foundation — to merge funds, compound resources, pool investments, and realize the potential of focused, intentional, mission-driven giving both individually and in the aggregate, and it does so for all time. Your charitable investments with The Catholic Foundation will endure to benefit others forever.

I can explain more, and I would be happy to talk with you about your personal philanthropic goals and objectives. If you are considering establishing a charitable fund of any kind, please call me for an appointment at 972.661.9792.

Don and Jane Hanratty —

COMMITTED TO GIVING

Don Hanratty calls his duty as chairman of the Distribution Committee "one of the Foundation's best jobs," because it takes him on site visits all over the Diocese to assess the changing needs of the community.



Jane and Don Hanratty

This rewarding, eye-opening experience has also reinforced the decision his family made years ago to establish a charitable fund at The Catholic Foundation, he says. Initially he chose the Foundation for its "one-stop-shopping" convenience. But he has been equally impressed by the professional expertise available, and by the Foundation's extensive experience, both in the community and in helping donors realize their charitable aspirations.

As an entrepreneur (Don is CEO of Optimance, a management consulting firm), he and his wife Jane also appreciate the financial flexibility of the fund they established at The Catholic Foundation and what he calls "the versatility" the Donor-Advised Fund affords them. "Our charitable interests include lots of different Catholic institutions, especially schools and programs for children. But we also like to support the March of Dimes, the Special Olympics and others, and The Catholic Foundation sees to it that our dollars move to the full variety of programs we're interested in."

Finally, Don and Jane enjoy the fact that their now-grown children — Meghan, 25; Ryan, 27; and Kelly, 29 — have shared in the family's charitable-giving decisions for the last 15 years, because it has taught them how to be effective, mindful philanthropists, too.

A LIGHT *On*

The Catholic Foundation distributed a generous \$762,415 in grants to 22 different recipient institutions Wednesday, October 25 at St. Thomas Aquinas Catholic School in East Dallas.

These gifts were made possible, Foundation President Ed Schaffler noted, by the Foundation's extraordinary donors who have created and contributed to the Foundation's Unrestricted Endowment Fund as a perpetual commitment to the people of the Diocese of Dallas. Several other grants were made from restricted funds established with the Foundation to achieve donors' specific philanthropic purposes.

According to Catholic Foundation practice, the trustees award grants twice annually, once in the spring and again in the fall, following a thorough evaluation of each grant request received. Qualified applicants submit a completed grant application and as part of the grantmaking cycle, trustees make personal site visits and submit their recommendations.

The largest grant this fall (\$80,000) was made to St. Augustine Catholic Church, a largely Hispanic and growing parish located in far East Dallas whose three priests have been living in an "unsafe, unhealthy, unsecured, and barely standing facility," according to the grant application and review. The money will be used, with \$50,000 from the diocese and \$30,000 from the parish, to

convert a Knights of Columbus building into a new rectory.

Three grants in the \$60,000 range were also made to diocesan institutions: one to St. Mary of Carmel Catholic School to replace four HVAC units and to assist with the Reading Recovery program; one to Divine Mercy of Our Lord Catholic Church to help cover an unforeseen relocation of the water lines imposed by the City of Mesquite during the construction of this new parish's church; and the third, a matching grant, to the University of Dallas for the UD Energy Conservation Project.

Grants that were equally important: \$3,000 each to Notre Dame School for a new freezer and to Our Lady of Perpetual Help Church for a new rectory roof. Additional grants approved included:

- \$50,000 Children's Education Fund – Catholic School Tuition Assistance
- \$50,000 Montserrat Jesuit Retreat House – furnishings for the new Edmund Campion Hall
- \$50,000 Nuestra Senora Del Pilar Church – pews for new church
- \$50,000 St. Francis of Assisi Church (Lancaster) – expansion of entry area
- \$48,508 Immaculate Conception School – new roof
- \$35,000 White Rose Center – salary assistance for new position

- \$30,000 Sacred Heart Church (Rowlett) – assistance for new 25-passenger bus
- \$25,000 St. Philip the Apostle School – computer lab updates
- \$25,000 Bishop Dunne Catholic School – assistance with construction of a community center and field house
- \$20,000 St. Cecilia Parish – repair and restoration of gym floor
- \$15,000 Low Birth Weight Development Center – assistance with new building construction
- \$13,407 Catholic Charities/Marillac Social Center – computer technology update

An additional \$16,513 was granted to the Catholic Charities/Marillac Social Center computer technology update project from the Jane & Henry Neuhoff Fund for the Poor and Needy; and three more grants approved by the trustees were made to the Museum of Nature and Science (\$10,000), Prince of Peace Community School (\$10,000), and St. Mary of Carmel School (\$9,665) from the Emma Louise Buhner Endowment Fund.

Grant applications are available from The Catholic Foundation by calling 972-661-9792 or online at www.catholicfoundation.com. The next submission deadline is January 18, 2007 for spring grant consideration. 🙏



St. Philip the Apostle School



Immaculate Conception School



The Notre Dame School of Dallas

The Catholic Foundation HONORS

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to serve as president, and he has served multiple terms on the DFW Airport Board, of which he was elected chairman in 2006. He is, in addition, currently a board member of scores of civic organizations, including: Zale Lipshy University Hospital, the University of Dallas, the Texas Academy of Math and Science at the University of North Texas, Jesuit Foundation, the Dallas Museum of Natural History's Associates Board, and the Texas Nature Conservancy advisory board. He has previously served as a trustee of the Jesuit College Preparatory School, The Catholic Foundation, The Science Place, the Southwest Research Institute, the Dallas Council on World Affairs, and the Greater Dallas Chamber of Commerce, among others.

With The Catholic Foundation Award, the Foundation trustees honor Jan Collmer's distinguished service to the charitable,

educational, and evangelical needs of the Diocese. "Few people in Dallas have made commitments that reach so broadly and so deeply into our community," says Foundation President Ed Schaffler. "Jan Collmer has been tireless in pursuit of quality educational experiences for our

"When you ask someone to help, you're simply trying to show them a way to leverage their resources into something with far, far greater life. You're giving them an opportunity to do something really worthwhile."

— JAN COLLMER

young people. He recognizes that the next generation is critical. And not only does he contribute his time and his money, but he encourages others to give as well, compounding the effect of his generosity."

Collmer appreciates the honor, but shrugs off the praise. "It's not like it's a sacrifice for me to give. It's fun. And there's a tremendous return." And he likes to raise funds for the institutions he cares about. "When you ask someone to help, you're simply trying to show them an opportunity to leverage their resources into something with far, far greater life. You're giving them an opportunity to do something really worthwhile."

The Catholic Foundation Award has, since 1983, honored outstanding persons who "go far beyond the call" in giving of time and energy for the welfare of their brothers and sisters in Christ.



This painting, *Celebrate Life, Celebrate Art*, was unveiled on the art wall of the new Catholic Foundation Plaza during dedication ceremonies on October 26, 2006. The mural designed by Dallas artist Marty Ray was selected from among several submissions by North Texas artists and will be featured throughout the Plaza's inaugural year. A Dallas native who teaches ceramics and sculpture at North Lake Community College in Irving, Ray calls her installation "a jumbled gumbo" mingling the themes of nature, art, music, and dance. She says the design "celebrates the coming together of many

factions of our City that are making things happen for the Arts." The Plaza, 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), includes benches, a fountain, a wall listing benefactors, and a unique trellis providing respite from the Texas sun. It was given to the people of Dallas by The Catholic Foundation in celebration of the Foundation's 50th Anniversary.

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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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