

# THE Good Word

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## Catholic Foundation Award Honors Mary Templeton's Community Service

*An inspired volunteer  
who makes a difference*

When Mary Templeton retired from her 14-year career in finance with General Electric and moved to Dallas with her husband, Rich, in 1994, she decided to stay home with their three young children. "Home" soon grew to encompass the whole of the greater Dallas community where the Templetons would live and work – Rich with TI, and Mary as a volunteer in myriad schools and organizations.



It all started, Mary says, at St. Mark the Evangelist Catholic School where she was: a library book reader, room mother, Junior Achievement teacher, PTSO treasurer, coach, Brownie leader, auction

volunteer and (!) more! Her motivation was three-fold: "to thank the teachers by helping them; to spend time with my children at school; and for the personal satisfaction of getting to know other parents."

She and Rich made many good friends as part of the St. Mark's community where Mary's generously effective contributions of time and talent were noted by others and she was invited to serve on the board of the University of Dallas, beginning in 2000. Her tenure there led to additional service on the boards of the John Paul II High School,

*(continued on page 5)*

### THE PRESIDENT'S LETTER



#### *I Believe in Angels*

Do you believe in angels? I certainly do.

At The Catholic Foundation, we get to see angels all the time. They are the generous benefactors who support our work. And they are the grant recipients working among us to make life in our Diocese of Dallas better.

With each issue of The Good Word, we write about some of the many different ways to support The Catholic Foundation. Over the past year we have discussed charitable trusts, wills, life insurance, charitable gift annuities, gifts of appreciated securities and donor advised funds. Someone recently asked me if there were any gifts the Foundation would not accept;

my response was that we will work with a donor to effect most any type of gift they wish to make.

What all of the various ways of giving add up to are the means by which one can support our community through The Catholic Foundation. As I have said many times, there is no question as to the needs. That's why the Foundation is always looking for angels – and donors – to help meet them. The challenge is great.

It's easy to think of angels at Christmastime. Why not think of being one?

I wish you all the best in the Christmas Season and the New Year.

EDWIN M. SCHAFFLER

# A Strong FOUNDATION

## FORMER CHAIRMAN LEN RUBY RETIRES FROM BOARD OF TRUSTEES

“Len Ruby was a phenomenal Chairman of the Board during his 2007-2008 tenure” according to Ed Schaffler, Foundation President and CEO. Len returns the compliment, explaining the board’s job “is to support Ed and the Foundation team, and the team was in place that allowed us to move forward on many fronts.” Len Ruby completed nine years of service on The Catholic Foundation board – and to the Catholic community – this year.



Peggy and Len Ruby

The former chairman also salutes his entire board. “It is a very solid, hard-working group of people. The board plays a major role, especially in the distributions process,” he explains. “Our trustees don’t give away a nickel without understanding what the need is.” To that end, every grant involves a site visit, and every request a thorough analysis of its financial integrity and potential to be effective. It is gratifying work, he notes, in that it allows trustees like him, a retired Interstate

*We’re not fundraisers. We help people plan their giving for the future.*

LEN RUBY, FORMER FOUNDATION CHAIRMAN

Mr. Schaffler notes that “Len was the guiding force behind the development and implementation of a very successful three year strategic plan involving the board of trustees and the Foundation staff. Several new initiatives were the result of this strategic plan and have positioned the Foundation as the primary philanthropic resource in the Diocese of Dallas.”

Len says that “with The Catholic Foundation staff, we were able to get traction on a comprehensive planned giving program. It really took hold.” He applauds the new professional advisors seminar that brings awareness of the Foundation as a source of planned giving expertise to the professional advisor community, too.

Battery executive, to put their business skills to work for the good of the community. It is also frustrating work, he adds, because they see “really great needs, and don’t have the money to do all they would like to do.”

Still, he notes, “We’re not fundraisers. We help people plan their giving for the future.”

He is particularly proud of the Foundation’s 50th Anniversary gift to the community: the Arts Plaza located on the grounds of the Cathedral Shrine of the Virgin of Guadalupe in the Arts District. And he will miss his Foundation work but he is not done serving the community. He continues on the boards of the University of Dallas and The Family Place, and remains active in his St. Pius X parish.

IN MEMORIAM:

## *Marjorie Ann White*

Marjorie White, once Sister Mary Cletus White of the Sisters of Divine Providence, and a chemistry professor at the University of Texas in Austin where she earned her PhD, and Mountain View College in Dallas, served, after her retirement, as a fair and generous landlord in Oak Cliff, and as an active teacher and volunteer at both Blessed Sacrament Catholic Church and Grace Presbyterian Village in Dallas until her death at age 87 this fall. She was also a faithful, generous, and creative Catholic Foundation donor.

Her ministry, according to Father Tim Gollob, pastor of Holy Cross Catholic Church, where Dr. White sent her five “unofficially adopted” children to school, was vast and varied. It included not only many years of care and education for the five children, Pro-Life activism, and the leadership of the “Merry Makers,” a group of senior citizens, but also her purchase of properties throughout Oak Cliff which she refurbished and rented at low cost to people in need of housing. In defining her legacy she bequeathed the rental properties to The Catholic Foundation to be used, after her death, to fund significant donations to three specific charities, including Grace Presbyterian Village, the Slaves of the Immaculate Heart of Mary, a convent in Ohio, and The Catholic Foundation.

“She was a great woman, a great woman,” says Father Tim, who recalls that she insisted that everyone be very disciplined and everything regimented. “She served the poor. Sort of like Mother Theresa, but in her own way.” She will be greatly missed.



Marjorie Ann White

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### MAKING GIVING SIMPLE, KEEPING IT EFFECTIVE

As former board chairman Len Ruby notes, “We’re not fundraisers. We [the trustees and professional staff of The Catholic Foundation] help people plan for their future.” As usual, he is right on. (See page 2.)

I would only add that we help people give, too. We might begin with the simple gifts that support their parishes, or their children’s

schools – and then, as we develop a relationship, help them develop a more comprehensive plan for their charitable giving, making every contribution intentional, and appropriate for the different stages of their lives.

The Catholic Foundation can do this because, as a community foundation, we offer a number of different charitable giving vehicles designed to be efficient and effective for donors and gift recipients alike. The most popular of these – a donor advised fund and a designated fund – simply facilitate a donor’s charitable giving. The first involves

writing a check and communicating your charitable intentions to the Foundation so that the funds are distributed in support of the various organizations, institutions, and causes that have meaning for you and your family. The second provides more focus, supporting a particular organization or service, but again, you simply make your tax deductible gift to the Foundation, and the Foundation handles the mechanics.

It’s easy to develop good giving habits. And we would be happy to help you.

## “It’s a fantastic vehicle”

### JOE COLEMAN, DONOR

It would be hard to find a more enthusiastic Catholic Foundation donor than Joe Coleman, a Dallas attorney and former Foundation trustee.

He is not, however, willing to be held up as an icon of philanthropy, or, as he says, “just some guy who’s willing to contribute money” – because that’s not who he is. But he is willing to explain how easy it is to contribute that money you want to invest in charity using a Donor Advised Fund at The Catholic Foundation.



Carmen and Joe Coleman

“It’s a fantastic vehicle for someone who may not have a whole lot of money at the time – may be paying children’s tuitions, like we are, for example – but who wants to make charitable contributions to their church or their school or even an arts organization.”

“What I do is just write one check to The Catholic Foundation at year-end to secure the tax deduction, and then advise the Foundation, periodically, throughout the year, how I would like the funds disbursed. They write the checks and keep the records. It’s incredibly efficient and organized.”

In addition, says Joe, “As a donor’s relationship with the Foundation – and with the Foundation charitable giving professionals – develops, the Catholic Foundation can help you think about aspects of charitable giving you may want to include as part of your estate plan. Working with the Foundation brings donors in contact with the broader needs of the Diocese, too, and can start you thinking about what you might like to be able to do ten, or twenty years down the road.”

The Donor Advised Fund also made it easy for Joe and his wife, Carmen, to involve their children, now ages 16, 19, and 21, in their charitable giving decisions. “We could talk about what’s important to us as a family and what causes might be important to the kids. They were particularly interested in supporting a church in Honduras – they’d been down there a few times – and we could do that.”

Joe believes his charitable impulse derives from “the generous example of others” in his close-knit Catholic community and “the desire to be good stewards of the many blessings God has provided.” 🙏



# A LIGHT On

## WHERE FOUNDATION GRANTS GO AND WHAT THEY DO . . .

Even in the ordinary course, the twice-a-year grants cycle of The Catholic Foundation illustrates an ongoing commitment to the purpose of the Foundation's founders and the essential nature of our mission today.

The Fall/Winter grants approved by the Foundation trustees and distributed November 17 at Mary Immaculate Church in Farmers Branch will provide \$638,623 in tangible financial support to 17 different entities. They will be used, in most cases, to finance growing programs or help meet the growing needs of people and parishes throughout the Diocese. They will, for example, fund educational enrichment in Diocesan schools through a partnership with Big Thought, support Catholic Charities' services to the elderly, provide tuition assistance in collaboration with the Children's Education Fund, add to the Kids Eat Free summer lunch program at St. Anne's Parish in Coppell in partnership with Christian Community Action, and expand the Pro-Life Committee's Spanish ministry. New textbooks, roof repairs, computer infra-

structure, mold remediation, pew and kneeler replacements, and parish hall renovations will also be funded, along with two Diocesan marketing campaigns.

"Each grant is approved only after a very thorough vetting process," notes Foundation President and CEO Ed Schaffler. "Our trustees review each application, conduct site visits, undertake analyses of agency and program budgets and their potential to be effective, and then debate – sometimes vociferously – the merits.

"We see how Catholic Foundation funds are being used to leverage certain projects, how some applicants can use the reputation of the Catholic Foundation – and this arduous approval process – to make a project credible." He explains, for example, that another of the Fall/Winter grants – one for \$100,000 – will be used to kick off the third phase of the St. Cecilia Catholic Church building fund. The new church – the old one was destroyed by fire – has been framed, using funds from the insurance and \$1.3 million from the Bishop and other donations, but needs \$2.1 million to be completed and furnished.

"What we are also able to do – while it is never enough because there are so many needs – is leverage the gifts of many which comprise The Catholic Foundation's Unrestricted Fund for the good of all. We are most grateful for our donors' charitable intentions and enduring support." 🐸

## The Catholic Foundation makes charitable giving simple.

That's the key message of this year-end newsletter. A Donor Advised Fund which allows donors to shape any number of charitable gifts made from one tax-deductible contribution to the Foundation or a Designated Fund which allows the donor to provide ongoing charitable support to a particular organization, institution or cause, even a simple codicil to a will which leaves a part or percentage of one's estate to The Catholic Foundation for either general or specific charitable causes can be executed and implemented easily.

But that doesn't mean the "back story," if you will, is not sophisticated and complex. That's the work of the Foundation, though; we keep it simple for the donor, while our professional staff navigates the tax regulations and structures an array of effective charitable giving vehicles to meet our donors' personal charitable objectives.

Take, for example, a "simple" Designated Fund established recently at the Foundation. The name, The Holy Land Scholarship Fund seems clear enough. But the mission is, as is usually the case, more complex. This charitable fund, established by Father Peter Vasko and the Board members of the Franciscan Foundation for the Holy Land, is to provide college scholarships for students studying in the Holy Land. Since 1997, more than 130 students have received scholarship assistance and the goal is to build a \$20 million endowment nationwide over the next several years.

All in a day's work at the Foundation. And with deep appreciation of our donors' vast creativity and generosity.



Kids Eat Free summer lunch program at St. Anne's Parish in Coppell in partnership with Christian Community Action



Catholic Charities help serve the elderly

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## Inspired volunteer

(continued from page 1)

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the Southwest Region Boys and Girls Club, and the Dallas Arboretum. She also has served as an advisor for fund raising to the Visiting Nurses Association and Catholic Charities and, with her husband Rich, provides generous support to the United Way of Dallas.

For this extraordinary record of continuing service to the community, Mary Templeton will be honored with the 2011 Catholic Foundation Award at the Foundation's Annual Dinner, Friday, February 11, at the Intercontinental Hotel, Dallas.

The Templetons say they have been inspired to give back to the community "by those who did it before us," citing in particular the founding families of Texas Instruments and their far-reaching philanthropy across the arts, schools, hospitals and universities in Dallas.

"Where our generation of students has personally benefited from generous gifts that built Ursuline, Jesuit, Bishop Dunne, and Bishop Lynch high schools, it is our turn to make a difference for the next generation of students." Their unique blend of philanthropy and volunteer service, has been a passion which has helped with the development of the new John Paul II High School in Plano. Philanthropy, Mary believes, involves more than writing a check; it is an investment in the future. Volunteering, she notes, takes place very much in the present, and has had its reward in the many people she has met who have enriched her life.

In accepting the 2011 Catholic Foundation Award, Mary says she is very humbled to think she might be an inspiration to others – as women like Margaret McDermott, Bea Haggerty, Lydia Novakov, and Marianne Staubach have been to her. "Dallas is a dynamic city because the private sector shares its resources for the greater good in all aspects of life. And The Catholic Foundation is a prime example of the dedication of many people working together to make a difference."

## MANY HANDS MAKE... A SUCCESSFUL ANNUAL AWARD DINNER



When all the good works of The Catholic Foundation – and the specific service to the community of 2011 Catholic Foundation Award winner Mary Templeton – are celebrated at the Annual

Award Dinner Friday, February 11, the successful event will be yet another example of caring people coming together via The Catholic Foundation to accomplish great things within the Catholic community. The people, in this case, are the many, many volunteers serving on the Annual Dinner committee. With deep appreciation we salute:

Chairmen Bob and Colleen Baillargeon, and Kevin Batholomew, Robert Berg, Mark Bianchin, Cindy Boggs, Kieran Brennan, Raymond Chavez, Thomas W. Codd, Jr., Joseph F. Coleman, Michael R. Corboy, Walt Coughlin, and O. Dan Cruse, Jr.

Also: Dana DeAngelis, Thomas J. Donovan, Raul Estrada, Dan Flaherty, Jackie Fleming, Robert Galecke, Kathleen Gigi, Michael Gruber, James L. Hairston, Donald J. Hanratty, Robin P. Hartmann, Kasey P. Hollon, Albert Hrubetz, Francis P. Hubach, Margo Keyes, Randy and Maureen Kilmer, John R. Kraft, Vicky Lattner, and Norma Longwell.

In addition: Lee and Dianne Maas, Michael F. Maguire, Walt Mannari, Peter and Colleen Martin, Michael J. McCurdy, Thomas E. Merkel, Deacon Brian J. Mitchell, Thomas J. Moore, Joseph C. Murphy, Dan and Lydia Novakov, Neil and Pat O'Brien, Scot W. O'Brien, Thomas W. Poore, Leonard Ruby, Joanie Scott, Deacon Denis G. Simon, Bill L. Sladek, Susan H. Stanzel, Marianne H. Staubach, Chris Taylor, Wendy M. Traylor, Eugene Vilfordi, James G. Walsh, and Mark Wischmeyer.

## ART CONTEST WINNER

### Catholic Foundation Plaza



The mural "Downtown Playground" by Lyn Kelly has been installed on The Catholic Foundation Plaza in the Dallas Arts District as this year's winning entry in the Foundation's annual contest for local artists. Located on the corner of Flora and Crockett Streets on the grounds of the Cathedral Shrine of the Virgin of Guadalupe, the Plaza was a gift to the citizens of Dallas to commemorate the Foundation's 50th anniversary. Kelly, a full-time artist who works from his studio in Hurst and displays his talent on his studio webpage, called the contest an opportunity to demonstrate his "affection" for the Dallas Arts District and his "appreciation" for the Cathedral and for the very existence of the Plaza.



Artist Lyn Kelly and "Downtown Playground"

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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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For additional information regarding the Foundation, please call 972-661-9792 or refer to: [www.catholicfoundation.com](http://www.catholicfoundation.com)



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