

2021 Annual Report

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**WE ARE
THE
FOUNDATION.**

THE CATHOLIC FOUNDATION

Every year, donors through their generosity reconnect with the vision and purpose that guided a group of lay leaders in our community nearly 70 years ago, when they established The Catholic Foundation.

This past year, as the moderation of pandemic mandates and precautions allowed, we were all reconnecting, as the Foundation resumed face to face gatherings.

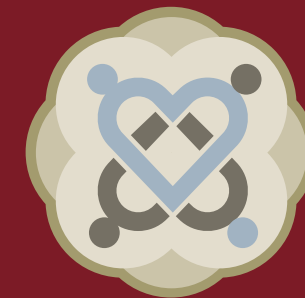
The Foundation now stewards more than \$300 million in assets. In 2021, we awarded \$21.5 million in grants to deserving religious, educational and charitable groups.

Being “face to face” again mirrors the closeness of The Catholic Foundation to those we serve – both in our understanding of the needs faced by our community, and in the eyes of generous donors, who are the foundation of all we do.

Using the competencies of the Foundation, donors can have a greater impact on the causes most meaningful to them.

This year’s report highlights the commitment of three of these donors.

We invite you to join them, to connect with us in alignment with your beliefs, and to be the foundation for the decades ahead.





BARBARA AND JIM MORONEY DONORS

The Institute for Homiletics at the University of Dallas is a partnership of the Diocese of Dallas, The Catholic Foundation, and UD. Its focus is the art of preaching. But the origin of the Institute is a lunch that Jim Moroney, former publisher of *The Dallas Morning News*, shared with Father Joshua Whitfield in 2019. After Jim offered a comment about the quality of preaching in Catholic churches, Father Whitfield inspired him to take steps to improve it.

So began Jim's campaign, with Barbara's encouragement, to raise \$7.5 million to create an institute that inspires and improves the preaching skills of Catholic clergy.

Announced in March of 2021, but officially launched in September with the hiring of Executive Director Dr. Karla Bellinger, the Institute is the only one of its kind in the United States. It has been supported by The Bishop Tschoepe Institute of Homiletics and Communications Fund of The Catholic Foundation, and The Homiletics Fund of The Catholic Foundation established by Moroney. The initial "class" includes priests and deacons from the Dallas Diocese, and also from the Diocese of Victoria, Texas, and the Diocese of Green Bay, Wisconsin.

"With guidance from the Foundation, we have the opportunity to help strengthen the preaching of priests, deacons and seminarians, so they'll flourish in their ministry. This is really about connecting the people in the pulpit to the people in the pew. Its impact can bring more Catholics closer to an encounter with the Living God, in Dallas and beyond."

together
WE ARE THE FOUNDATION.

MARGARET AND HENRY “HANK” HERMANN DONORS

When Hank Hermann, whose background is in financial services, first learned about the existence of free pharmacies for those who could not afford medications, he and his wife Margaret were intrigued. By 2005, as President of the Society of St. Vincent de Paul of North Texas, he was determined to start a free pharmacy in Dallas.

There were regulatory hurdles to jump over, and the path to the opening of a free pharmacy in the Vickery Meadow neighborhood of Dallas was a winding one. The Catholic Foundation, where Margaret and Hank have a Donor Advised Fund, was asked to steward the initial funds raised for the pharmacy.

To use the St. Vincent de Paul Pharmacy, patients must be of low income and have no health insurance. Clients are typically the working poor, often with chronic conditions, who can't afford to be sick. For many, their choice in the past had been between paying for prescriptions and paying for food.

The pharmacy opened in early 2018 and distributed a modest 850 prescriptions in its first six months. In fiscal year 2021, that number grew to 30,000 prescriptions. Most were for patients in the Dallas Diocese, but the pharmacy is now focused on mailing direct to a patient's home and has expanded its service statewide. It expects to dispense about 80,000 prescriptions this fiscal year. As treasurer and a board member, Hank continues to guide the pharmacy's tremendous growth and impact.

“Our typical patient is on three or more medications, which they need daily. Why do this? What the Society of St. Vincent de Paul is all about, at the beginning of the day and at the end of the day, is to grow in holiness through service to others. I found myself in my service to others through the pharmacy.”

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KATHY AND JOE MURPHY DONORS

For Joe and Kathy Murphy, education is the “charitable thread” that ties together most of their giving. Joe, a retired partner at PriceWaterhouseCoopers, has helped Catholic schools through relationships built up over the years in business and on boards. Joe chaired the board at Jesuit Dallas, where the Murphys’ two sons attended and a grandson does today. He is a past chair of the University of Dallas board and on the current UD President’s Advisory Committee.

The Murphys support Our Lady of Perpetual Help, a school where 96% of the students need financial aid. Joe has helped Bishop Dunne with its finances and fundraising, and he is also the treasurer of the Diocesan Educational Endowment Fund which provides tuition assistance to Catholic school students. As Kathy comments, “So much for retiring.”

Joe and Kathy describe their involvement with The Catholic Foundation as an education. Joe served two terms on the Foundation’s board, which he says “opened my eyes,” to the needs of those requesting grants. The Murphys have a Donor Advised Fund (“a no brainer”) and also a Fund specially designed to handle Qualified Charitable Distributions from IRAs, a giving strategy they knew nothing about until they read about it in a Foundation newsletter.

“The Foundation helped us understand how we could better manage our donations – our investments as we think of them. We know from experience that Catholic schools need to be financially sound to have excellence and have a larger number of students. And you have to put dollars into pre-K and K. The future of Catholic education – the future of the Catholic church – depends on this.”

together
WE ARE THE FOUNDATION.

With gratitude to Catholic Foundation donors, and in appreciation for a year in which our staff and board of trustees reunited with others in person again, the Foundation celebrated a vibrant year of growth in 2021.

Keeping pace with two previous years of record setting performance, unrestricted and restricted contributions from donors exceeded \$25 million.

The generous display of charitable giving reflects the meaningful impact that donors continue to have on our Catholic community and beyond.

Thanks to donors, both past and present, the Foundation awarded \$21.5 million to more than 800 charitable organizations in the form of 2,400 grants. Of that amount, 86 percent was earmarked by donors for Catholic organizations and 75 percent went toward qualified charitable organizations in the Dallas area community.

This support raised the total amount of grants provided over time to religious, charitable and educational organizations to \$247 million reflecting the powerful impact of donors of the Foundation.

For the first time since The Catholic Foundation was founded in 1955, more than \$300 million in assets was under management at year's end.

The Foundation's long-term investment strategy and board approved Investment policy enabled us to withstand unsteadiness in the stock market, yielding a 14 percent investment return for 2021.

After more than a year overshadowed by virtual and remote meetings, 2021 proved to be a year of reunification and celebration with one another.

When estate and wealth management professional advisors gathered for the Foundation's annual Advisors Series, we talked about major year-end planning opportunities considering potential tax changes.

As more than 130 Legacy Circle members joined together to recognize long-term commitments made to the Foundation, discussion revolved around the importance of sustained giving that often involves planned gifts such as bequests and charitable trusts.

When hundreds of people from multiple parishes came together to learn about Circle of Life issues from a Catholic perspective, we discussed pastoral care of the sick and dying, legal matters, funeral and cemetery planning, charitable legacy planning and Catholic bioethics.

At these seminars, guests learned ways that families could achieve peace of mind by helping loved ones to connect with their favorite causes before important decisions are hampered by a health calamity.

The same held true for the Foundation's quarterly Catholic Community Network panels that resumed late in the year and gave nonprofit leaders the opportunity to hear from several North Texas Catholic publishers and reporters about the best ways to engage with faith-based members of the news media.

At local Catholic schools where students, teachers and staff persevered through more than a year of social distancing, Foundation staff returned once again to present Work Of Heart awards. During those inspiring ceremonies, the smiles on the faces of employees recognized for going above and beyond to make a meaningful difference in the lives of young people and co-workers was priceless.

In recognition that many homebound and shut-in members of the community are unable to attend Mass in person, the Foundation continued as the financial presenting sponsor of the weekly televised Spanish and English Masses from the Diocese of Dallas joined by tens of thousands each week.

In 2021, popular giving tools such as donor advised funds, designated funds, scholarship funds and charitable gift annuities continued to grow. Likewise, donors established a variety of funds involving legacy gifts and complex major gifts affiliated with closely held stock and other business interests.

As a lay-based community foundation, we are grateful for the trust placed in the Foundation to serve as good stewards of assets managed for donors.

New partnerships with the Guadalupe Radio Network and Young Catholic Professionals will enable anyone affiliated with those two organizations who want to leave a legacy gift to be directed to The Catholic Foundation.

This game changing opportunity to assist organizations with planned giving, and help them accept charitable gifts from the estates of their supporters, paves the way for powerful growth.

In 2021, the Institute for Homiletics at the University of Dallas, a collaboration involving the Foundation, Diocese of Dallas and UD, was launched to enhance preaching in the Catholic Church and create deep-rooted encounters with Christ. The first cohort of participating priests and deacons from three Catholic Dioceses begins in the summer of 2022.

As more in-person interactions take place in the months ahead, the Foundation will continue to counsel organizations on best practices as we meet with donors to examine ways to structure planned gifts for the benefit of a particular nonprofit. All the

while, the Foundation will serve as a home for an organization's permanent endowment to house and steward planned gifts.

As Foundation staff and trustees meet you in the months ahead, they will do so with great confidence about the future of philanthropy and The Catholic Foundation.

Approaching our 70th year of existence, we remain committed to fulfilling the blueprint established in 1955. Together, we will make the communities we serve even stronger through the generosity of our charitable donors.



Aileen Pratt

Aileen Pratt
Chair



J. Matthew Kramer

J. Matthew Kramer
President and Chief Executive Officer



Thanks to the generosity of donors past and present, here are the highlights we accomplished together in 2021:

Following three years of substantial growth, assets under management on December 31, 2021, exceeded \$300 million.

\$300M

The Foundation awarded \$21.5 million in grants to deserving religious, education and charitable groups.



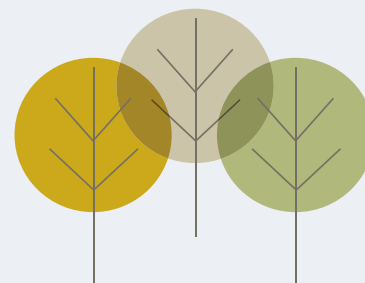
The Foundation continued to sponsor televised Masses throughout 2021, as a service to those who could not attend in person, and that sponsorship continues in 2022. The Foundation is recognized at the beginning and end of each Mass.



Heajung Jina Lee's "Be Happy" is selected in the Foundation's Art on the Plaza competition and adorns the 28-by-9 foot public art wall behind the Cathedral Shrine of the Virgin of Guadalupe in downtown Dallas.



50 Work of Heart Awards, each with a \$500 stipend, are bestowed by the Foundation to recognize exceptional Catholic school employees in the Diocese.



Three Circle of Life programs, two of them in person, provided information and insight, especially related to estate planning and other end of life issues.

150 PROS

Over 150 professionals – attorneys, wealth managers – came together in Q4 2021 at the 15th annual Advisors Series to

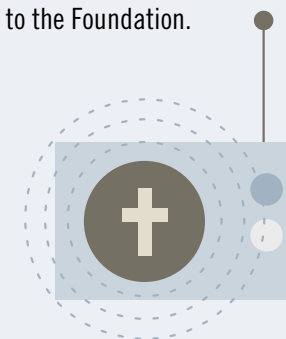
learn more about the Foundation's core competencies and how we might serve their clients.



In a collaboration between the Foundation, Diocese of Dallas and the University of Dallas, the Institute for Homiletics is established at UD. In September, Karla J. Bellinger, M.A., DMIN is named Executive Director.



An agreement is formed in November with Guadalupe Radio Network (GRN) to use the Foundation's core competencies in the service of potential donors to the network of 39 Catholic radio stations around the country. GRN promotes the Foundation on its website and directs potential donors to the Foundation.



Dallas-based Young Catholic Professionals (YCP), with 27 chapters nationwide, partnered with the Foundation to help establish a permanent endowment and a planned giving program.

**YCP+TCF
=GIVING**

Statements of Financial Position

December 31, 2021 (with comparative amounts as of December 31, 2020)

Assets	2021	2020
Cash and cash equivalents	\$ 2,626,410	\$ 2,309,896
Accounts and trade receivable	336,063	264,019
Contributions receivable	42,000	400,000
Pledges receivable, net	2,341,615	2,153,073
Beneficial interest in trusts held by others	1,332,166	1,459,530
Investments	205,939,533	180,555,964
Agency funds	87,128,192	77,910,721
Real estate held for investment	531	531
Other assets	<u>490,829</u>	<u>538,613</u>
Total assets	<u>\$ 300,237,339</u>	<u>\$ 265,592,347</u>
 Liabilities and net assets		
Liabilities		
Accounts payable and accrued liabilities	\$ 810,248	\$ 605,506
Distributions payable	51,911	50,001
Grants payable	3,371,450	2,974,741
Liability to trust beneficiaries	3,669,349	3,532,994
Agency funds	87,128,192	77,910,721
Deferred revenue	4,901,277	4,448,268
Annuities payable	<u>4,333,659</u>	<u>4,507,003</u>
Total liabilities	104,266,086	94,029,234
Net assets		
Without donor restrictions	42,464,400	35,929,786
With donor restrictions	<u>153,506,853</u>	<u>135,633,327</u>
Total net assets	<u>195,971,253</u>	<u>171,563,113</u>
Total liabilities and net assets	<u>\$ 300,237,339</u>	<u>\$ 265,592,347</u>

To see a full copy of our audited financial statements, please visit www.catholicfoundation.com.

Statements of Activities

Year ended December 31, 2021 (with summarized financial information for the year ended December 31, 2020)

Revenue, gains, and other support	Without Donor Restrictions	With Donor Restrictions	2021 Total	2020 Total
Contributions, net	\$ 2,221,378	\$ 23,032,537	\$ 25,253,915	\$ 25,579,806
Investment income				
Dividends and interest	569,585	2,118,298	2,687,883	2,482,673
Net realized and unrealized gain on investments	7,298,316	13,727,196	21,025,512	14,648,293
Real estate income	-	-	-	17,613
Investment advisory fees	1,354,312	-	1,354,312	1,083,165
Other	1,523,222	20,016	1,543,238	759,637
Gain on uncollectible accounts	-	54,859	54,859	929,303
Change in value of split-interest agreements	(418,009)	321,351	(96,658)	(720,944)
Net assets released from restrictions	<u>21,400,731</u>	<u>(21,400,731)</u>	-	-
Total revenue, gains, and other support	33,949,535	17,873,526	51,823,061	44,779,546
 Expenses				
Grants	21,514,028	-	21,514,028	23,262,618
Grants administration	427,390	-	427,390	432,871
Annuity payments and distributions to beneficiaries	257,339	-	257,339	281,982
Annuity payments and distributions administration	247,968	-	247,968	236,555
Development	1,793,301	-	1,793,301	1,535,830
Management and general	<u>3,174,895</u>	-	<u>3,174,895</u>	<u>2,636,042</u>
Total expenses	<u>27,414,921</u>	-	<u>27,414,921</u>	<u>28,385,898</u>
Change in net assets	6,534,614	17,873,526	24,408,140	16,393,648
Net assets at beginning of year	<u>35,929,786</u>	<u>135,633,327</u>	<u>171,563,113</u>	<u>155,169,465</u>
Net assets at end of year	<u>\$ 42,464,400</u>	<u>\$ 153,506,853</u>	<u>\$ 195,971,253</u>	<u>\$ 171,563,113</u>

To see a full copy of our audited financial statements, please visit www.catholicfoundation.com.

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† Deceased as of June 10, 2022
* Former Chairman of the Board
• Founder

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In late 2009, The Catholic Foundation Legacy Circle was created to honor the individuals and families that have made long term commitments to the Foundation, and we are deeply grateful for their trust and shared charitable vision.

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2
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3
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4
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5
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