



2020
Annual Report

THE CATHOLIC FOUNDATION

The Catholic Foundation started more than 65 years ago with a group of lay people in the Diocese of Dallas who wanted to make a difference.

Today, the Foundation continues to do its good work through an ever-growing network of friends, neighbors, fellow parishioners and everyday people with extraordinary generosity in their hearts.



In 2020, this generosity enabled The Catholic Foundation to achieve our second highest ever annual levels of both contributions – more than \$25.5 million – and grants – more than \$23 million.

It was heartening to see that a global pandemic could not mitigate our donors' generosity. Nor did it stop The Catholic Foundation from pursuing our mission to promote charitable giving and stewardship that serves donors and the needs of our community.

We did so in myriad new ways, some tailored to the unique conditions of 2020, from sponsoring televised Masses to hosting online webinars to producing video messages on Faith, Love and Hope.

Though circumstances kept us physically apart for much of the year, our shared philanthropic spirit made us realize more than ever that we are at our best when we are working together.

TOGETHER, WE ARE THE FOUNDATION.





MARY LYNN AND FRED BANGS

Donors, The Catholic Foundation

Parish: St. Rita Catholic Community, Dallas
TCF Donors since: 2008

Organizations supported include: The Pines Catholic Camp, Genesis Women's Shelter, Dallas CASA, Our Lady of Perpetual Help Catholic School, Ursuline Academy of Dallas, Jesuit College Preparatory School of Dallas, Texas Historical Foundation.

"We felt really drawn to the Foundation during the pandemic. We contributed to the televised Masses in part because that's how we attended. Also, these Masses could reach out beyond those traditionally shepherded in person – like the serviceman who was deployed but could watch Mass at the same time his mother did. That's pretty awesome."

– Mary Lynn Bangs

Mary Lynn and Fred are the Foundation.

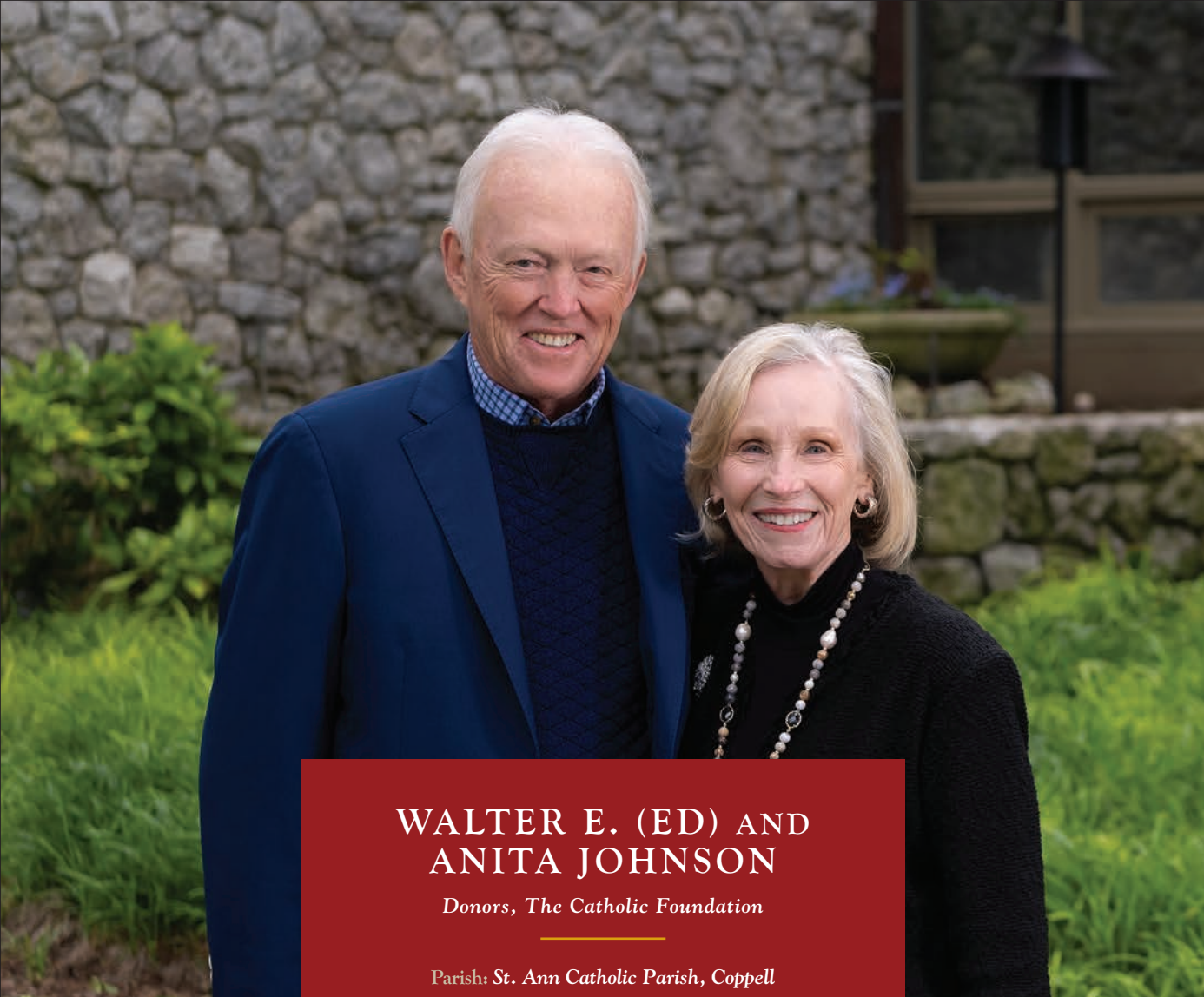


TOGETHER, WE ARE THE FOUNDATION.



CHANNELING COMMUNITY DEVOTION

One of the many charitable endeavors supported by the Bangs family is The Catholic Foundation's ongoing sponsorship of televising weekend Masses from churches in the Diocese of Dallas. To maintain community in the pandemic and allow people to "pray in place," the Foundation began sponsoring the Catholic Diocese of Dallas' broadcast of a Spanish Mass on Univision and an English Mass on KDFI-TV every Sunday. What was originally going to be a multi-week initiative received a flood of appreciation from viewers, as well as support from donors, so the program continued throughout all of 2020 and will do so through 2021 as well. ✨



TOGETHER, WE ARE THE FOUNDATION.

WALTER E. (ED) AND ANITA JOHNSON

Donors, The Catholic Foundation

Parish: *St. Ann Catholic Parish, Coppell*
TCF Donors since: *1980s*

Organizations supported include: *Franciscan University, Life Teen International, Nashville Dominican Sisters, Focus on the Family, NET Ministries, Christian Community Action.*

“After a lot of prayer and reflection, we decided doing our philanthropic efforts through The Catholic Foundation was right for us. We really like the professionalism and reliability. We have a Donor Advised Fund and have arranged in our will to leave our estate to the Foundation, managed and overseen by our two sons and the Foundation, so it truly becomes a family legacy”

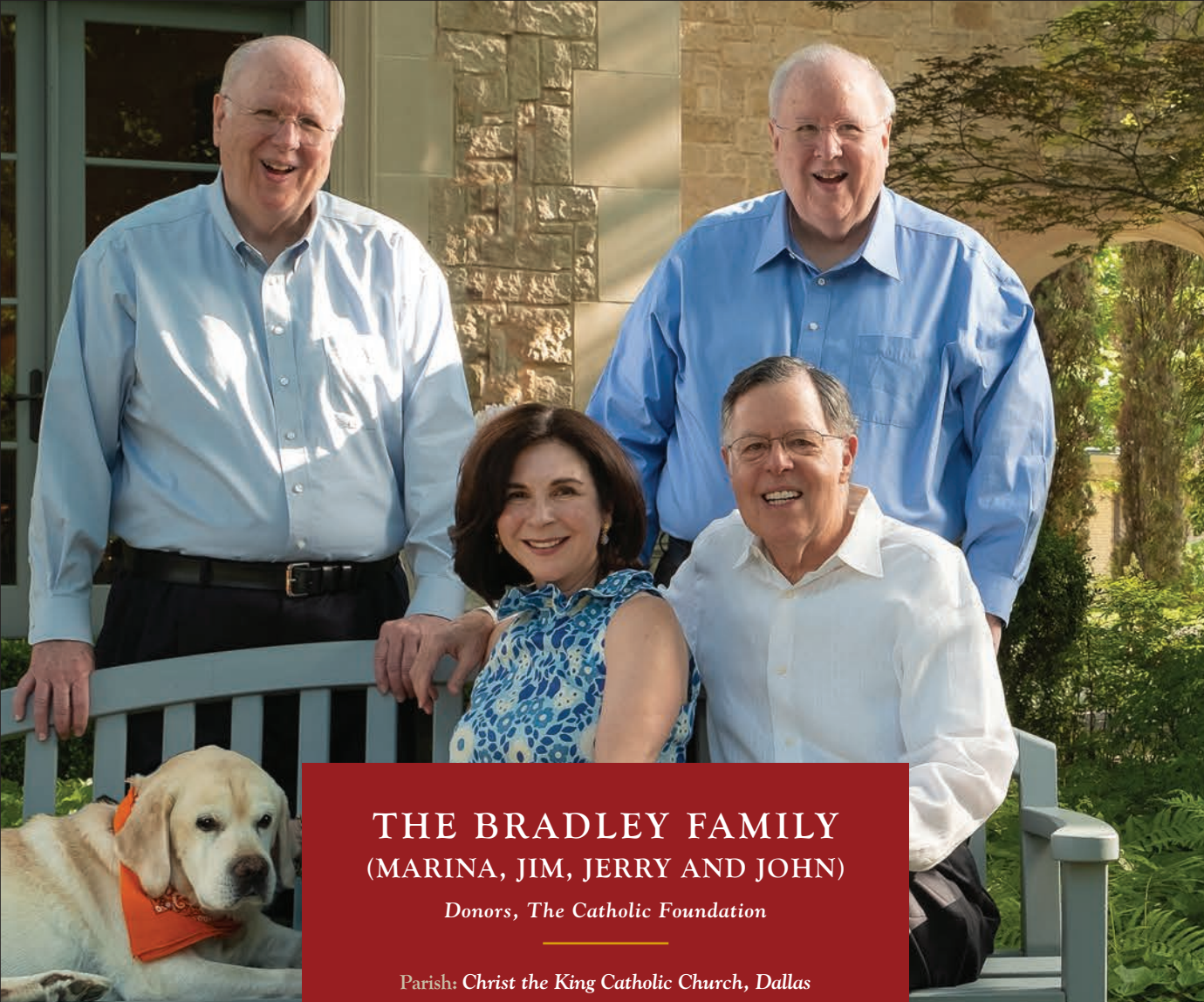
– Ed Johnson

Ed and Anita are the Foundation.



LEAVING A LASTING LEGACY

The Johnsons are members of The Catholic Foundation Legacy Circle. The Legacy Circle honors forward-looking philanthropists who have made long-term commitments to the Foundation through planned gifts such as bequests and charitable trusts, establishing a fund that is either permanent or ultimately benefits the unrestricted Philanthropy Fund. Legacy Circle members can also utilize the Foundation’s resources to develop other types of planned charitable gifts to ensure that The Catholic Foundation may continue its work, and support their philanthropic visions, for years to come. ✨



**THE BRADLEY FAMILY
(MARINA, JIM, JERRY AND JOHN)**

Donors, The Catholic Foundation

*Parish: Christ the King Catholic Church, Dallas
TCF Donors since: 1980s*

*Organizations supported include: University of Notre Dame,
Jesuit College Preparatory School of Dallas, Christ
the King Catholic Church, Christ the King Catholic
School, Discalced Carmelite Nuns of Dallas,
and Catholic Charities of Dallas.*

*“As a family, we share many philanthropic
interests – Catholic education, for one –
but The Catholic Foundation also gives us
professionally managed funds that allow
us to support causes we are individually
passionate about, like helping the
Dallas Carmelite Nuns.”*

– Marina Bradley

Marina, Jim, Jerry and John are the Foundation.

TOGETHER, WE ARE THE FOUNDATION.



PURSUING YOUR PHILANTHROPIC PASSIONS

Among the funds that members of the Bradley family (twin brothers John and Jerry, younger brother Jim and his wife Marina) support through The Catholic Foundation are a Scholarship Fund for Notre Dame, where all three brothers attended, and a Designated Fund from Jim and Marina benefiting the Dallas Carmelites, an order of nuns who are not permitted to raise money for themselves. The Catholic Foundation offers donors several types of funds, including Designated and Donor Advised Funds, which allow them to support the causes they care most about. ✨

Building on an outstanding performance in 2019, the work of The Catholic Foundation's staff and board and the support of our generous donors produced another exceptional year.

By creating a work-from-home environment that maximized technology to streamline operations, development activities, and communications, the Foundation helped individuals magnify their charitable vision last year.

Thanks to donors past and present, unrestricted and restricted contributions exceeded \$25.5 million in 2020, the second highest annual total ever despite a global pandemic that shook our economy.

This remarkable activity in an unprecedented year of societal unrest resulted in 790 charitable organizations receiving grants of more than \$23 million through 2,600 grants.

Our long-term investment strategy, reinforced by a board approved Investment Policy and a steady hand, allowed the Foundation to navigate the steep stock market drop in February – March and the quick recovery with confidence, yielding a 14% return for 2020. At the end of the year the net assets had grown 10.8 % to more than \$265 million.

This strong performance was the realization of the Foundation's cultivation of strong relationships over the years. That work involved seed planting to help donors create charitable plans that will make a lasting impact.

The ability to achieve a banner year required the Foundation to quickly adjust and respond to the unique needs brought on by COVID-19.

Starting in mid-March, face-to-face events and gatherings were replaced with online video meetings and webinars. Foundation staff reached out to donors in creative ways to make philanthropic planning convenient and efficient.

Some of our signature annual events that warrant a face-to-face format were postponed, and we look forward to hosting those special occasions in 2021 and 2022.

A new program, "*The Conversation*," provided valuable information about end-of-life issues from a Catholic perspective. This program started as an in-person event. After social distancing guidelines became the norm, the sessions shifted online.

Likewise, spring and fall grant presentations moved to the virtual world. Several grant recipients shared

poignant stories about the impact of their grant from The Catholic Foundation.

The annual Art on the Plaza dedication recognizes the work of a Texas artist. Their work appears for a year in The Catholic Foundation Plaza, adjacent to the Cathedral of Our Virgin of Guadalupe, in the Dallas Arts District. As a result of our Facebook Live event in October, there was considerable social media buzz.

The same was true for our quarterly Catholic Community Network panels. Three programs were presented online in 2020. Those gatherings brought together professionals from a variety of for-profit and non-profit organizations to learn best practices from experts covering topics such as leadership, staffing, networking and publicity.

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2020 HIGHLIGHTS:

EDUCATING ON END-OF-LIFE ISSUES

Prior to pandemic shutdowns, The Catholic Foundation hosted *The Conversation: A Catholic Perspective on End-of-Life Issues* at St. Rita Catholic Community in Dallas. The free event was well-attended, and the Foundation planned on offering the full program again. With the onset of COVID, we pivoted to provide *The Conversation* as a free webinar series, which attracted hundreds of registrants. Topics covered included:

"Pastoral Care of the Sick & Dying"

by Fr. Jason Cargo, V.F. – St. Joseph Catholic Church, Richardson

"Legal Considerations: Ensuring Your Wishes are Followed"

by Michael F. Lynch, Malouf Lynch Jackson & Swinson, P.C.

"Principles of Catholic Bioethics"

by Fr. Peter Fonseca, Archdiocese of St. Louis

"Funeral and Cemetery Planning"

by Chris Taylor, Dignity Memorial

"Charitable Legacy Planning"

by Michael George, The Catholic Foundation

Videos from the webinar series can be seen in the Photo and Video Library at www.catholicfoundation.com.

VIRTUALLY CONNECTING WITH OUR COMMUNITY

The Catholic Foundation reached out to donors and friends in a variety of virtual, digital ways, aware of the fact that many in our community were isolated for long stretches during the pandemic. This included creating and distributing a series of uplifting videos featuring local clergy and the founder of the Fellowship of Catholic University Students delivering positive insights and encouragement to help us all through a potentially difficult period. The video series included:

"A Message of Hope"

featuring Fr. Edwin Leonard

"A Message of Faith"

featuring FOCUS founder and CEO Curtis Martin

"A Message of Love"

featuring Fr. Abbot Peter Verhalen

The videos have received hundreds of views, and are available to enjoy in the Photo and Video Library at www.catholicfoundation.com.



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The Professional Advisors Series in November provided wealth management and legal professionals with valuable information about the impact of taxes on charitable gift planning. This year it was presented as a webinar. The program provided continuing education credit while helping professionals learn how to work with the Foundation on behalf of their clients.

When shelter-in-place guidelines closed area churches in March, Dallas Bishop Edward Burns recognized an opportunity to televise the weekly Mass.

The Catholic Foundation decided to sponsor the Sunday Masses in English and Spanish on local TV, and live streamed on the Diocesan social channels. This raised the awareness of the Foundation in a powerful way by engaging Catholics and non-Catholics, located locally and abroad, who were unable to attend a church in person for health or other reasons.

In terms of charitable giving tools, donors established a variety of new funds last year including legacy gifts and complex major gifts involving closely held stock and other business interests. Additional popular giving tools included Donor Advised Funds, Designated, and Scholarship Funds as well as Charitable Gift Annuities. There are now more than 490 charitable funds and trusts that make up The Catholic Foundation.

By nimble pivoting, the Foundation achieved many goals in 2020. As the pandemic eases, more face-to-face opportunities will doubtless result in additional growth.

It was a successful year thanks to donors, clergy, fellow charitable organizations, all those involved in the Catholic Schools, and the community at large who remain focused on helping those in need during difficult times.

The global pandemic created many challenges, and your Board of Trustees and staff worked diligently to ensure that the work of the Foundation was not interrupted.

As we reflect on the challenges overcome and the positive impact made in 2020, together with you, we form a strong foundation whether we're together or socially distanced.

By remaining agile, yet always focused on the future, we strive to carry out the mission of The Catholic Foundation, true to the vision established more than 65 years ago.



Aileen Pratt

Aileen Pratt
Chairman



J. Matthew Kramer

J. Matthew Kramer
President and Chief Executive Officer



IN MEMORIAM

We remember with love and respect those in The Catholic Foundation community who passed away in 2020, but whose spirit of generosity lives on, as they remain in our hearts. Together, we are the Foundation.

Deceased Donors, Trustees, Former Trustees and Catholic Foundation Award Honorees:

- | | | |
|-------------------------|----------------------|--------------------------|
| Patrick A. Beeby | Betty Jo Lastelick | Deacon Brian J. Mitchell |
| Abbot Denis Farkasfalvy | Genevieve M. Madigan | Alice Morgan |
| Bernadette M. Gadzella | Irma McCusker | Martin J. Norris |
| James J. Hammett | Nancy McLochlin | Charles M. Patrick |
| Jean B. Iskra | | Sam A. Wing |



Statements of Financial Position

December 31, 2020 (with comparative amounts as of December 31, 2019)

Assets	2020	2019
Cash and cash equivalents	\$ 2,309,896	\$ 2,401,913
Accounts and trade receivable	264,019	185,269
Contributions receivable	400,000	80,000
Pledges receivable, net	2,153,073	-
Beneficial interest in trusts held by others	1,459,530	1,523,678
Investments	180,555,964	165,050,863
Agency funds	77,910,721	63,665,302
Real estate held for investment	531	491,032
Other assets	<u>538,613</u>	<u>517,502</u>
Total assets	<u>\$ 265,592,347</u>	<u>\$ 233,915,559</u>
Liabilities and net assets		
Liabilities		
Accounts payable and accrued liabilities	\$ 605,506	\$ 744,803
Distributions payable	50,001	54,625
Grants payable	2,974,741	2,211,827
Liability to trust beneficiaries	3,532,994	3,355,920
Agency funds	77,910,721	63,665,302
Deferred revenue	4,448,268	4,029,882
Annuities payable	<u>4,507,003</u>	<u>4,683,735</u>
Total liabilities	94,029,234	78,746,094
Net assets		
Without donor restrictions	35,929,786	32,200,555
With donor restrictions	<u>135,633,327</u>	<u>122,968,910</u>
Total net assets	<u>171,563,113</u>	<u>155,169,465</u>
Total liabilities and net assets	<u>\$ 265,592,347</u>	<u>\$ 233,915,559</u>

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

Statements of Activities

Year ended December 31, 2020 (with summarized financial information for the year ended December 31, 2019)

Revenue, gains, and other support	Without Donor Restrictions	With Donor Restrictions	2020 Total	2019 Total
Contributions, net	\$ 557,384	\$ 25,022,422	\$ 25,579,806	\$ 26,546,601
Investment income				
Dividends and interest	610,275	1,872,398	2,482,673	3,488,293
Net realized and unrealized gain on investments	6,231,781	8,416,512	14,648,293	21,689,103
Real estate income	3,988	13,625	17,613	15,517
Investment advisory fees	1,083,165	-	1,083,165	1,127,529
Other	743,017	16,620	759,637	105,755
Gain on uncollectible accounts	-	929,303	929,303	2,939,674
Change in value of split-interest agreements	(388,407)	(332,537)	(720,944)	(974,997)
Net assets released from restrictions	<u>23,273,926</u>	<u>(23,273,926)</u>	-	-
Total revenue, gains, and other support	32,115,129	12,664,417	44,779,546	54,937,475
Expenses				
Grants	23,262,618	-	23,262,618	33,898,318
Grants administration	432,871	-	432,871	438,206
Annuity payments and distributions to beneficiaries	281,982	-	281,982	281,375
Annuity payments and distributions administration	236,555	-	236,555	240,901
Development	1,535,830	-	1,535,830	1,424,923
Management and general	<u>2,636,042</u>	-	<u>2,636,042</u>	<u>2,500,759</u>
Total expenses	<u>28,385,898</u>	-	<u>28,385,898</u>	<u>38,784,482</u>
Change in net assets	3,729,231	12,664,417	16,393,648	16,152,993
Net assets at beginning of year	<u>32,200,555</u>	<u>122,968,910</u>	<u>155,169,465</u>	<u>139,016,472</u>
Net assets at end of year	<u>\$ 35,929,786</u>	<u>\$ 135,633,327</u>	<u>\$ 171,563,113</u>	<u>\$ 155,169,465</u>

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

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Legacy Circle

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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