

THE Good Word

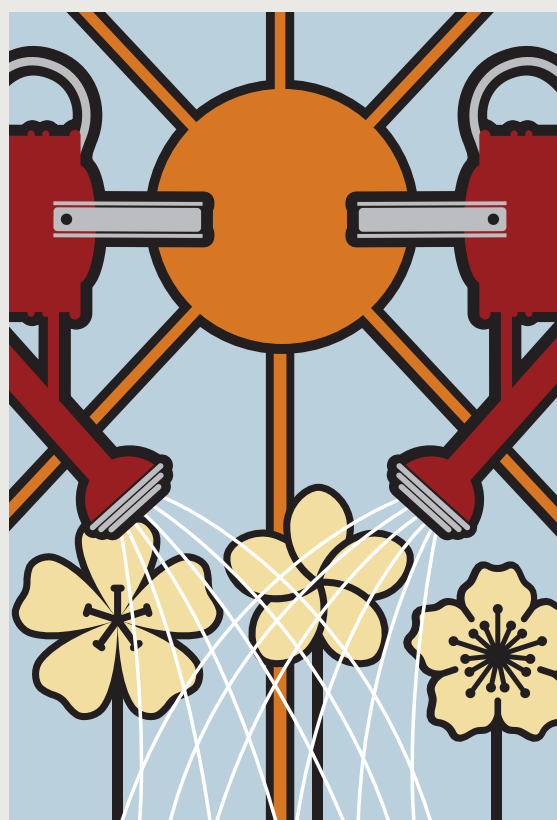
VISIT OUR WEBSITE: www.catholicfoundation.com

CATHOLIC FOUNDATION HELPING NONPROFITS ACCEPT GIFTS FROM ESTATES

The Catholic Foundation has been selected by the Guadalupe Radio Network (GRN) and Young Catholic Professionals (YCP) as their planned giving partner nationwide. The new alliance enables anyone affiliated with GRN, including radio listeners nationwide and YCP members coast to coast, who want to leave a legacy gift to be directed to the Foundation.

“Our parishes, schools and Catholic organizations do a wonderful job of providing for their mission via annual gifts from donors and outstanding support from capital campaigns,” says Matt Kramer, president and CEO of The Catholic Foundation. “Where many of these institutions fall short, however, involves planned giving, or charitable gifts from the estates of their supporters. In many cases, planned gifts are the largest charitable contributions that many of us will ever make.”

Knowing how important gifts from retirement assets or from an estate can be, the natural question is: “Why do so many charitable enterprises shy away from them?”



For most organizations, it boils down to three things, says Michael George, senior development officer of The Catholic Foundation.

“The organizations feel they don’t have appropriate planned giving knowledge and are concerned that they can’t devote the necessary time or money to be successful,” says George. “What our parishes, schools and organizations don’t realize is they actually have more planned giving resources than they think.”

EXPANDING ABILITY OF CATHOLIC NON-PROFITS TO ACCEPT PLANNED GIFTS

“Most of our educational, religious and charitable entities have a wide variety of ways to communicate with their supporters in forums like parish bulletins, newsletters, websites, letterhead, annual reports and social media,” he adds. “Organizations don’t have to spend a lot of money to be effective. Putting appropriate planned giving messages in communication vehicles that already exist is an easy an effective way to educate people.”

(continued on page 5)



THE PRESIDENT’S LETTER

When I was joined by board chair Aileen Pratt and several former board chairs to present Lydia and Dan Novakov with the 39th annual Catholic Foundation Award at our annual Award Dinner, the sense of serving others filled the room.

Both Lydia and Dan draw upon their faith to serve the needs of others in countless ways.

The dynamic couple inspired the filled banquet room to give back not just because we’re asked, but because we seek to make the lives of others better through our actions.

Like past honorees, Lydia and Dan never seek the limelight. Their humility, heartfelt gratitude and grace reflect how we’re called to be servant-minded leaders who think of others before self.

That mindset is something our staff and I witness so often from our donors who partner with us at The Catholic Foundation.

They trust us to be good stewards of their assets. We see them make huge impacts on our community as they recommend that funds be directed toward various charitable organizations in need of things like new roofs to prevent

leaks, improved technology to stimulate minds, enhanced curriculum to broaden horizons and vehicles to transport supplies or people.

If you’re interested in making a substantial difference in the lives of others, I encourage you to view the video of the Award Dinner and listen to Lydia and Dan’s remarks, and hear what others had to say about them. The Award Dinner videos are located on the Foundation website.

Letting your God-given talents impact others takes work. The good news, however, is that being philanthropic and living out a life of community service provide such a comfort when you witness the societal impact.

If you’d like to learn more about The Catholic Foundation and see how we can help you align your charitable passion with your personal interests, please contact us.

Our team has your best interests in mind, and we’d enjoy helping you establish a plan of action that will serve both your needs and those of the community. 🙏

A handwritten signature in black ink, appearing to read "J. Kramer".

J. MATTHEW KRAMER
President and Chief Executive Officer

A Strong FOUNDATION

SITE VISITS TO GRANT SEEKERS INSPIRE BOARD OF TRUSTEES



Trustees Dan Odom and Aileen Pratt during a grant seeker site visit at the Cathedral Shrine of the Virgin of Guadalupe

Year after year, one of the most enjoyable responsibilities Catholic Foundation board of trustees get to participate in involves visiting the facilities of grant seekers in the Dallas area community.

This winter, Lois Cartwright, senior vice president at Merrill Lynch, and a member of The Catholic

Foundation's board of trustees the past two years, visited the Cathedral Shrine of the Virgin of Guadalupe and Bishop Dunne Catholic School.

Interacting with the grant seekers face to face, and seeing their facilities, brings their needs to life she says.

"It means the world to me to be able to understand where The Catholic Foundation grant money is actually going, how it's going to be used and how it's going to benefit people in the community," says Cartwright. "I feel much more connected to the grant making process, but particularly to the people, the organizations and to the churches and schools that we visit.

"I have a much better understanding of the needs of the community and how we can help and how much impact the donations actually have to allow these grants to be made," says Cartwright.

IN-PERSON MEETINGS DEEPENS FAMILIARITY

Board chair Aileen Pratt agrees with Cartwright about the impact of site visits that take place twice a year as trustees consider spring and fall grant requests.

"It has been so interesting and such a pleasure to go to so many different areas of our large diocese and meet with the various priests, teachers and lay leaders who are running our churches, schools and nursing homes," she says.

"I have enjoyed being able to discuss with them the work that they are doing each and every day, to see firsthand the project they are requesting funds for and to talk with them about their most pressing needs," says Pratt. "I always leave the visits so impressed with the hard work, dedication and commitment of these educators and clergymen to our Catholic community."

Former trustee Joe Popolo loved participating in site visits to make decisions about grant requests. One visit that he particularly enjoyed was to the Dallas Brady Senior Center that is run by Catholic Charities Dallas.

"I was so impressed by the staff, the faithful way they treated and engaged their clients, and the overall effectiveness of the Center," says Popolo. "It literally is a life saver. It reinforced for me how the mission of the Foundation and the work our board members do have a real impact in Dallas." 🐟

CIRCLE-OF-LIFE SEMINAR OFFERS PEACE OF MIND

A full audience at St. Paul the Apostle Catholic Church Parish Center in Richardson enjoyed an information packed winter seminar that provided a Catholic perspective on issues people should plan for in advance of a loved one or oneself passing away.

The Circle of Life seminar, "The Conversation," featured five experts who discussed pastoral care of the sick and dying, legal decisions, funeral and cemetery planning, charitable legacy planning and Catholic bioethics.

During his presentation, Msgr. Milam Joseph, who celebrates his 58th year of priesthood in May, spoke about a time he was hospitalized eight years ago. During his hospitalization, he received the sacrament of the sick from a dear friend and fellow priest Msgr. Henry Petter. He referred to the sacrament of the sick as "a sacrament of the living, not of the dead."

"When we're sick, dependent and vulnerable, Jesus Christ is with us," he said. "In those time of vulnerability and sickness, fear is excessive. But it's the awareness and experience of not being alone and that we're in the Body of Christ that brings us peace."



Deacon Charlie Stump



Chris Taylor

"LIFE IS A PRECIOUS GIFT FROM GOD"

Deacon Charlie Stump, who talked about Catholic bioethics, said life is "a precious gift from God."

To drive home the importance of knowing how one's Catholic faith guides medical decisions, he shared a story of his mother's illness and a question his father posed to medical officials: "What kind of drug is hospice?"

As people live longer thanks to healthier eating, exercise and modern medicine, Deacon Stump said we must all get comfortable in learning about the teachings of the Catholic Church when it comes to health care since the patient will often not be able to make those decisions on their own.

MORE SEMINARS PLANNED IN 2022

Other speakers included Michael Koenecke who talked about essential legal documents related to one's death and why they are important.

Chris Taylor with Dignity Memorial talked about how people can best plan to interact with service providers when it comes to funerals and cemeteries.

The Catholic Foundation's Cheryl Mansour, senior vice president of donor relations, discussed charitable legacy planning. In her remarks, she talked about how people can connect with their favorite causes both now and in the future and offered several colorful stories of Catholic Foundation donors and how their legacy continues well after their death.

An attendee said the seminar "helped me to take my intentions and make them actionable. I walked out with a solid list of things to do and communicate with my family."

Another attendee said that the information they learned about how to distribute people's estates and how to keep families together – vs. fighting – over testamentary gifts was particularly helpful.

The next Circle of Life seminar will take place on June 4th at Holy Trinity Catholic Church in Dallas and registration will be on our website. 🐟

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Senior Vice President of Donor Relations

ENHANCED ASSISTANCE FOR DONORS

In the last several months I have been asked, “what will you be doing in your new position?”

The Foundation has grown considerably, and the Foundation is the donors who use it. Clients need a high level of attention as they plan complex gifts. That includes both the donor to The Catholic Foundation and the gifts structured from their fund at the Foundation to their target charities.

One of my duties in my new role will be to help and guide those donors through those processes so their resources will be effective.

As charitable giving becomes more sophisticated donors tend to become more focused. Charities

on the other hand may have their own priorities, sometimes creating a “disconnect” that calls for thoughtful planning, conversation and agreement, especially in cases where the donor may be gone when the money is used.

Today, there are many different charitable giving vehicles available to donors and their professional advisors to meet a donor’s goals and objectives. Explaining how these tools are used and making sure the donor understands the purpose and the manner for which they are intended is key.

An added layer of the process is explaining the “fund” and its machinations to the donor’s successor advisors and/or family. It is very important that successor advisors are made aware that a charitable fund exists and what role they will

play in the distribution and grantmaking when the original donors are gone. They need the same level of information and background as the original donor.

My role is to assist, intervene, and guide our donors using the combined experience of our Catholic Foundation team. This often includes working with the donor’s legal and financial team.

When you start thinking about your long-term charitable planning, call us early in that process. Let’s work together to minimize the headaches, make sure it is more fun and that your vision of a better world comes to pass.

It’s all about you, the donor. We are here for you. We’re reachable at 972-661-9792 and info@catholicfoundation.com. 🐟

AWARD RECOGNIZES EXCEPTIONAL CATHOLIC SCHOOL EMPLOYEES



Jesuit College Preparatory School Work of Heart recipients Diane Camara and Tricia Gerber with Matt Kramer

The Highlands School Work of Heart recipients Alex Navas and Veronica Moreno with school president Dr. Michael Pennell

Recent recipients of The Catholic Foundation’s Work of Heart Awards exemplified outstanding service, modeling a Christian example and going above and beyond for an individual student, family or community.

During the past 17 years, roughly 1,300 Dallas-area Catholic school full-time employees have received the Work of Heart Award which comes with a \$500 stipend and certificate to display.

Anyone familiar with a full-time Catholic school employee in the Diocese of Dallas can nominate individuals by using the application on our website under the Grants-Scholarships-Work of Heart tab.

While the accolades of being known as a Work of Heart recipient are great, what’s often most amazing at the presentations are the words of praise shared by their co-workers, parents or students.

HEROES IN OUR MIDST

Case in point, here are a few things shared about Alex Navas, IT Director at The Highlands School in Irving.

“Without skipping a beat, Alex has stepped into his position here very well. He has not only done an incredible job of keeping our school’s systems running well but has made huge improvements.

“Alex is one of those people who does everything with a smile. He is always ready to lend a helping hand.

“My computers seem to need a lot of attention, and he is always quick to respond and solve any issues. Just the other day, I saw my WiFi was extremely slow and Alex immediately fixed the issue, and as always, with a smile.”

Likewise, recent Work of Heart honoree Veronica Moreno, Executive Director at The Highlands School, received glowing comments from those who know her, including the following:

“Ms. Moreno is the definition of a Proverbs 31 woman. She encourages us to go to daily Mass and weekly Eucharistic adoration. She is the perfect example of laying our life and all our plans to God’s will.

“She unabashedly shares with us the trust she has in the Lord and shows us how to do it as well. She also tells us that through Christ all things are possible, even the biggest hardships we encounter.

“During the peak of the Covid-19 pandemic, I was one of her students doing online schoolwork. This brought about difficulties but that did not stop her from helping me. Because my mother wasn’t with me at the time, I was lacking the motherly presence in my day-to-day work at school. However, this special person was quick to become like a second mom to me. She is always there to listen to me, support me and guide me in many different aspects of life.” 🐟



2022 CATHOLIC FOUNDATION AWARD DINNER

Faith, Family, Friends Fuel Novakov Passion of Service

During an evening that celebrated Catholic philanthropy and community, Lydia and Dan Novakov were honored as the 39th annual Catholic Foundation Award recipients and Cistercian Preparatory School junior Luke Herda was recognized as the 2022 Hal Tehan Scholar.

More than 700 photos from the event are available on our website at catholicfoundation.com in the Photo & Video Library that you can view and download to share.

A FEW HIGHLIGHTS FROM LYDIA AND DAN'S SPEECH...

Lydia: "Dan and I believe we can do more, and be more effective, by partnering with our charitable agencies to meet the needs. And there is no better organization to team up with than The Catholic Foundation."

"St. James tells us that faith without works is dead. He challenges us to be doers of the Word and not hearers only."

"The Foundation makes it easy for us to live our faith by deed through feeding the hungry, serving the poor, comforting the sick, caring for the elderly, educating children, welcoming the stranger, enhancing the arts, and building and strengthening community."

Dan: "We are deeply humbled to receive this Award. However, we feel this award is not about Lydia and me. It is really about you, the Catholic philanthropic community, of which we are only a very small part. We have had the privilege to work alongside you to serve others and to expand the reach of our agencies and programs."

"Through our experiences, we have seen that it is the collective energies of the team working

together that makes the real and lasting impact. When Lydia and I reflect on who, and what, has influenced us individually, and our lives together, we think of three fundamental facets - faith, family and friends. Each is central to who we are and what we value."

"In closing, *we* would like to recall a line from our favorite movie, the Christmas classic, *It's a Wonderful Life*. In it, Clarence, the angel in waiting, is sent by God to save George Bailey. After Clarence shows George what life would be like if he had never been born, Clarence says to George: "You see, George, one man's life touches so many others. When he's not there it leaves an awfully big hole."

"So, let's go out and touch as many lives as we can and make it a wonderful life for as many as we can." 🐟



L to R: Trey Higginbotham, Isabell Novakov Higginbotham, Dan and Lydia Novakov, Sarah Conrow Novakov and Daniel Novakov



Dan and Lydia Novakov



Dinner chairs David and Sara Martineau



Bishop Edward Burns



Cheryl Unis Mansour



(Seated) Bill and Kathy Lang, Amy Mentgen, Jennifer and John Gates (Standing) Allie and Fr. Joshua Whitfield, Roger and Marianne Staubach, Melva Gates

2022 HAL TEHAN SCHOLAR LUKE HERDA LOVES HIS CATHOLIC EDUCATION



Alan, Luke and Joanne Herda

Cistercian Preparatory School junior Luke Herda was named the 2022 recipient of the Hal Tehan Scholar Award by a panel of Catholic Foundation trustees and received a \$5,000 scholarship for his senior year.

His essay, *“What My Catholic Education Means To Me,”* reflects his faith formation from his parents Joanne and Alan, family members, educators, friends and clergy. Luke is an altar server at Holy Trinity Catholic Church in Dallas.

Pray before meals. Read the Bible. Go to Mass. These were the primary tenets of my personal Catholicism before attending a Catholic school.

I always found myself as a spiritual person drawn to God. However, I never really understood the faith. I knew what I was supposed to do, yet I did not have a deep understanding of what it truly meant to be a Catholic Christian.

That all changed once I started attending a Catholic school in fifth grade. I now started not only to grow

in intellectual knowledge but spiritual knowledge as well.

I began to altar serve and felt the joy of serving the Lord at Mass in an interactive manner. This brought an additional layer of meaning to Mass for me. I looked forward to every Mass at which I was scheduled to serve.

I would very much like to write about what altar serving has meant to me. However, I simply cannot put into words the joy I felt every time I put on my cassock and surplice. I cannot put into words the camaraderie I felt with my fellow servers and the respect I had for the priests.

All I can say is that if I did not have a Catholic education, I never would have grown to have an intense love for this manner of service. In a way, my education thus means faithful service.

However, my Catholic education had not even reached its pinnacle yet. When I started to attend Cistercian, I witnessed firsthand a group of very special men who had devoted their lives to God.

My school is run by an abbey of Cistercian monks. Each one has dedicated his life to serve God as part of the abbey until death, which I admire greatly. They strive to have both prayer and work as central to their ministry.

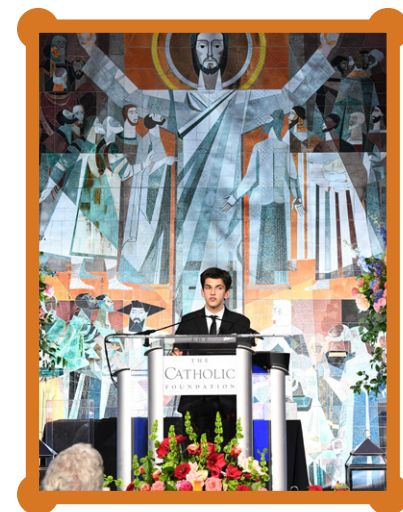
These Cistercian monks use scholarly instruction as their work.

Thus, my Catholic education means commitment. But that instruction is not the only special thing about my Catholic education.

Every day, I am able to see God. I see Him in the monks walking to and fro. I see Him in my friendships with my classmates. I see Him in the natural beauty of the campus. I see Him in the extracurricular activities in which I participate.

And I see Him most of all in my personal faith that has been carefully cultivated ever since fifth grade when I first entered into a Catholic school.

That cultivation. That care. That is what my Catholic education has meant to me above all. 🐟



Luke Herda

Catholic Foundation Helping Nonprofits Accept Gifts From Estates

(continued from page 1)

That leaves “time” and “expertise” as the biggest barriers to an organization’s planned giving program. Over the past six years, The Catholic Foundation has worked to resolve this by embarking on an ambitious program to expand the ability of Catholic non-profits to accept planned gifts from donors.

“In working with other nonprofits, we stress the importance of making planned giving more about the permanent relationship between an organization and a donor and less about the number of zeros on the end of a check,” George says. “At its best, philanthropy is about a donor’s need to give, not an organization’s desire to receive.”

The Catholic Foundation will continue counseling with organizations on best practices, offering to meet with donors to explore appropriate ways of structuring planned gifts for the benefit of a particular nonprofit and serving as a home for an organization’s permanent endowment to house and steward planned gifts.

In so doing, the Foundation will make it easier than ever for parishes, schools and organizations to

successfully secure planned gifts and provide their donors with appropriate ways to stay connected to them both now and forever.

GUADALUPE RADIO & YOUNG CATHOLIC PROFESSIONALS

Although the Foundation has worked with numerous other nonprofits on their planned giving programs over the past several years, two examples of their efforts stand out.

In early November of last year, the Foundation reached an agreement with the Guadalupe Radio Network to handle their entire planned giving program. “We operate 39 radio stations in 9 states plus the District of Columbia which are divided into 7 different markets across the country,” says Toya Hall, vice president of GRN.

“Because we have a trusted planned giving partner in The Catholic Foundation, we can rely on them to help us grow our permanent endowment while we focus wholly on our mission to lead souls back to Jesus Christ through the powerful medium of radio as well as

other major platforms,” she adds.

Dallas-based YCP, with 27 chapters nationwide, has also relied on the planned giving expertise of the Foundation.

“With the Foundation’s guidance, we were able to partner with them on establishing our own permanent endowment,” says YCP founder and executive director Jennifer Baugh. “As a result of this partnership, we are excited to announce the launch of our St. Joseph the Worker Legacy Circle to honor our planned giving donors at our annual conference in May.” 🐟

The Foundation stands ready to assist all Catholic institutions with launching or revitalizing their planned giving programs.

Call or email us at 972-661-9792
or info@catholicfoundation.com to see how the Foundation can assist you.

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