

# THE Good Word

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## The Catholic Foundation Welcomes Matt Kramer As New President, CEO

The Catholic Foundation welcomes J. Matthew (Matt) Kramer as the new president and CEO of The Catholic Foundation. Kramer, a longtime corporate executive in Dallas, succeeds Ed Schaffler who retired at the end of 2012.

"Matt Kramer's business experience paired with his strong connections to family, community and faith led to his selection as CEO and president of The Catholic Foundation," said Thomas Merkel, past chairman of The Catholic Foundation Board of Trustees. "The Foundation's Board of Trustees is confident that with Matt at the helm, we will find continued success in serving a growing donor base while meeting the rapidly multiplying needs of this community. We welcome Matt, a well-respected servant leader, to The Catholic Foundation."

Kramer gained 28 years of business and leadership experience at Dallas-based

Commercial Metals Corporation (CMC), most recently as CMC Americas Executive Vice President. He led strategy and policy process innovation teams that contributed greatly to significant business improvements. He left in 2009 to pursue his interests in teaching and consulting on international trade, succession and business strategy and headed Kramer Global Advisory, LLC and Leopard International Company.

"I am thrilled that my new role as president and CEO of The Catholic Foundation allows me the opportunity to combine my business expertise at growing and leading an organization, and my commitment to the Catholic community," said Kramer. "My wife Kris and I have been active in local parishes and Catholic organizations for 30 years, and this new career direction will allow me to focus my time, energy and expertise on a foundation that makes a tremendous impact on those it serves."



Kramer has served as co-chair of the \$15 million Catholic Charities of Dallas Endowment Campaign and is Vice President of the CEO Netweavers nonprofit organization as well as a board member at Central States Manufacturing Inc. of Lowell, Ark. Kramer earned a bachelor's degree in Russian studies with a minor in business administration at St. Louis University.

Kramer and his wife of 30 years, Kris, have two sons who are graduates of Jesuit College Preparatory School in Dallas. The Kramers attend St. Rita Catholic Church in Dallas, where he participates in choir and schola cantorum.



### THE PRESIDENT'S LETTER

Looking back fifteen years ago when I came to The Catholic Foundation as its new president I have to say I had no idea what a fantastic opportunity I had been given. As I looked ahead I also realized what an awesome responsibility I had been given; one, to connect the Foundation and its generous benefactors with all of the important needs of the

Diocese. I have learned how generous and caring people can be. I have seen it first hand. Secondly, I have seen how committed to doing the right thing the recipients of Foundation and donor grants are. I have witnessed our community growing in generosity and commitment to helping make our Catholic community better by giving to those with important needs the financial resources they needed to carry out their mission.

So as I wrap up my service to the Foundation I realize that the real beneficiary of my time at the Foundation is me. I have met so many generous donors who have made The Catholic Foundation what it is today and I have seen the fruits of the labors of those who work to make our Catholic community better everyday. My hope is that our community and The Catholic Foundation will continue to grow and prosper. Please continue to support the good works in our community through The Catholic Foundation. Thank you for the privilege and the opportunity to have been a part of it all!

Best wishes for a happy and prosperous New Year.



EDWIN M. SCHAFFLER

# A Strong FOUNDATION

## ED SCHAFFLER



As Ed Schaffler retires as president and CEO of The Catholic Foundation, friends from throughout the Dallas area are reflecting on his 15 years of dedication and the significant

mark he leaves on the Catholic community.

Since Ed took the reins in 1997, the Foundation has received \$57 million in contributions. It is now home to more than 300 donor advised funds and charitable trusts and manages more than \$125 million in assets. The Foundation has distributed more than \$56.7 million in grants during his tenure, touching virtually every parish and school in the Diocese of Dallas and fulfilling the philanthropic visions of donors for projects in Dallas and beyond.

During his tenure at the Foundation, Ed

assembled an effective and talented staff, expanded the donor base, implemented successful investment strategies, and strengthened the Foundation's grants, presence and relationships throughout the Diocese. His accomplishments include growing the annual award dinner to more than 1,300 guests, establishing the Advisory Council, and working with donors to create special programs like the Work of Heart Awards, honoring local Catholic educators, and the Legacy Circle, recognizing donors who have made planned gifts.

For the Foundation's 50th anniversary, Ed led the organization to fund The Catholic Foundation Plaza in the Dallas Arts District.

"Ed has grown The Catholic Foundation in donors, assets and community impact and brought the Foundation to a new level of excellence," says Thomas Merkel, the outgoing chair of the Board of Trustees. "On behalf of the board of trustees and staff, I'd like to thank Ed for his energy, integrity and commitment to the Foundation. His leadership is greatly appreciated and will be missed."

Bishop Kevin J. Farrell also says the Catholic community owes a debt of gratitude

to Ed. "The Catholic Foundation is such an important part of our Diocesan community, an independent foundation successfully led by a man with a strong Catholic faith, strong business acumen and a strong heart for his community."

Ed joined the Foundation in 1997 after working in public accounting in the business sector for Ernst & Young and other companies. An active member of the Catholic community, he has served as president of the Finance Council of St. Monica Parish, the Home and School Association, Notre Dame Alumni Club of Dallas, the Diocese of Dallas School Board and the Diocese of Dallas Finance Council and has been active in the Dallas Estate Planning Council and Conference of Southwest Foundations. 🐣

## New Advisory Council Members

The Catholic Foundation is pleased to welcome the following new members to the Advisory Council:

- **Denny Beran**, St. Elizabeth Seton Parish, retired Executive Vice President, J.C. Penney Co., Inc.
- **Matthew Bowen**, Prince of Peace Parish, senior vice president and general manager, FIS Corp.
- **John Grimes, Jr.**, St. Rita Parish, managing director, Duff & Phelps, LLC
- **Nicholas P. Panza**, St. Ann Parish (Coppell), president, Strategic Partners
- **Joseph V. Popolo, Jr.**, Christ the King Parish, CEO, The Freeman Company
- **James S. Ryan III**, St. Thomas Aquinas Parish, partner, Jackson Walker LLP

The volunteer Advisory Council is composed of individuals recognized for their leadership and contributions to the Catholic community. Nominated by the Board of Trustees, Advisory Council members serve to increase the visibility and reputation of The Catholic Foundation in the community and add to the expertise available to the Foundation.

## Outgoing Trustees

Five members of the Board of Trustees of The Catholic Foundation, including chairman Thomas E. Merkel, will conclude their service at the end of 2012, leaving a legacy of commitment and dedication to the Foundation as well as to the Catholic community.

Merkel, senior vice president of investments at Merrill Lynch in Dallas, joined the Foundation board in 2001 and previously served as chairman of the Investment Committee and chairman of the Audit and Administration Committee. He served ten years as a trustee before being named chairman in January 2011. His new position as immediate past chairman will bring his total years of service to 13.

"Tom strengthened the Foundation during a period of change, including the transition from board service from nine- to six-year terms but also during the change in administrations," says Ed Schaffler, president and CEO, The Catholic Foundation. "We are also grateful for his leadership in responding to needs of the Catholic community during challenging economic times." Other outgoing trustees include:

- **Alan D. Bell**, retired partner with Ernst & Young, who chaired the Investment Committee in 2011-2012 and the Audit and Administration Committee in 2009-2010.
- **Robin P. Hartmann**, of counsel with Haynes and Boone LLP, who joined the Foundation in 2005 and served as chairman from 2009-2010.
- **Kathy Muldoon**, senior vice president of Carter Financial Management, who chaired the Investment Committee and oversaw changes in the Foundation's portfolio.
- **David A. Small**, Law Office of David Small, from Oak Cliff, who was the Foundation's first significant representative from the African-American community, and was an enthusiastic member of several committees, including Development.

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

As *The Good Word* headed to press, Congress and the White House finally reached agreement on a last-minute measure to avert the “fiscal cliff” of scheduled tax increases and spending limitations. The short-term emergency was resolved, but we’ll be hearing more about comprehensive tax reform in the future as Washington attempts to deal with the deficit.

Tax policy affects businesses, large and small, but it also affects individuals and families in their own financial planning. As Congress and the White House discussed various approaches in December, some taxpayers considered taking capital gains before the end of the year or other tactics to shift income from 2013 into 2012.

Some of this affected charitable giving for many donors. The higher tax rates for higher-income donors, as well as the potential for changes in charitable deductions, caused some donors to attempt to “time” their charitable gifts for the best tax advantage. At The Catholic Foundation, we’re pleased to report that gifts were up for 2012. Some donors gifted appreciated securities to take advantage of the capital gains tax deduction before the end of the year in case Congress changes those rules unfavorably.

Ultimately, charitable giving comes from the heart. For most donors, only the timing and nature of the gift is affected by tax policy. Time will tell about the long-term tax picture, but

what we know is that charitable needs will always be with us. Charitable organizations depend on a steady flow of gifts to fulfill their mission, and this is an extension of the charitably-minded donor who is compelled to help others.

We’ll all pay attention to news coming from Washington. Keep in touch with your financial advisors about the tax changes and how it affects you. Then you can plan your charitable giving based on your specific situation. We’ll be studying the changes as well.

To learn more about how The Catholic Foundation can help you fulfill your charitable objectives, please call us at 972-661-9792.

## Donor Profile: MARINA & JIM BRADLEY



Jim and Marina Bradley

When Marina and Jim Bradley met on a blind date about nine years ago, they found they had a lot in common, including the legal profession.

Jim, a Dallas native, is the managing partner of the local office of Sidley Austin LLP and specializes in patent law, and at the time, Marina was the recruiting manager for Haynes and Boone LLP. The two had a deep Catholic faith and discovered a slightly more unusual mutual interest – long family connections to the Carmelite nuns.

Marina’s mother, Theresa, was raised in a convent in Eagle Pass, Texas, and imparted her love of the Carmelite nuns to her daughter as she grew up in San Antonio. When Marina’s mother died in 2010, the nuns at the Discalced Carmelite Monastery in Oak Cliff

dedicated a statue of St. Michael in her memory. Jim’s mother, Veronica, was a member of the Third Order of Our Lady of Mount Carmel and also imparted a love of the Carmelite nuns to her sons.

“Love of the Carmelite nuns is in our DNA,” Marina says. The Bradleys are intertwined with the nuns in another way – their passion for Labrador retrievers. Their



The Carmelite Nuns

Labradors, Murphy and Molly, are parents of two puppies the Bradleys gave to the monastery. The nuns love the Labs and have named them “Sister” Sandy and “Brother” Cormac. “Brother” Cormac is the only male at the monastery.

The Discalced (“barefoot”) Carmelite nuns are devoted to a simple, contemplative life of prayer and manual labor. They live

strictly on charitable donations and by their charter, cannot solicit funds. This July, on the Feast of Our Lady of Mount Carmel - July 16, Jim and Marina started a fund at The Catholic Foundation – the Dallas Discalced Carmelite Fund – to provide for medical care, utilities, building maintenance and other needs.

“Our goal is to build up a fund to provide annual income for the Carmelite nuns,” Jim says, adding that the monastery is “the best-kept secret in the Diocese.” Leaders of the Diocese, including Bishop Farrell, turn to the nuns for prayer. The order, which moved to Dallas from Mexico in 1928 due to persecution, now has 16 nuns from around the world and in 2013 will grow to 21, its maximum capacity. Mass is said in the monastery at 7:00 a.m. daily and on Sundays and is open to the public.

Jim and Marina, members of Christ the King Catholic Church, were familiar with the Foundation’s work through the Bradley Family Fund that Jim and his two brothers, Jerry and John, started in the 1980s. They chose the Foundation again to manage the new Carmelite fund and invite others to join them in supporting the cloistered community.

To learn how you can contribute to the Dallas Discalced Carmelite Fund, please contact The Catholic Foundation at 972-661-9792. 🐾

# A LIGHT On

## GRANT DISTRIBUTION

With assistance from \$733,509 in grants announced by The Catholic Foundation this fall, 21 Dallas-area Catholic schools, churches and programs will be able to expand programs, renovate or construct facilities, replace equipment and assist students with tuition.

The grants were made from the Foundation's Unrestricted Endowment Fund and from funds designated for support of religious, educational and charitable programs and associations in the Diocese of Dallas. They were made possible by gifts from Foundation donors, past and present, in support of the mission – to promote compassionate charitable giving that serves the needs of the entire Catholic community.

Meeting twice a year, the Distribution Committee of the Board of Trustees reviews grant applications and recommends that grants be awarded for those agencies and organizations that can best serve the physical and spiritual needs of the Catholic community.

Many of the awards will enable Catholic schools and organizations to construct or renovate facilities or improve energy efficiency. Bishop Lynch High School will construct a new student complex, while a grant to University of Dallas will support a campus transformation project.

Other grants will help Immaculate Conception Catholic School renovate student restrooms, the Montserrat Jesuit Retreat House replace the roof on St. Joseph Hall, and Our Lady of Perpetual Help



St. Monica Catholic Church is near completion of the sanctuary renovations.

Church renovate the parish cafeteria and kitchen. Jesuit College Preparatory School will install energy-efficient windows, Mount Carmel Monastery will replace the heating system in the cloister area, and Redemptoris Mater House of Formation will purchase and install a new boiler.

St. Cecilia Catholic School will renovate restrooms, St. Mary of Carmel Catholic School will install electronic-access systems on 15 doors, and St. Monica Catholic Church will renovate its facilities. Other grants will support the Catholic Chaplain Charity Fund for ministry at Parkland Memorial Hospital, Young Catholic Professionals programs, the Zero to Five Funders' Collaborative "Together We Learn" Program, and the Work of Heart Awards Program to honor Catholic school employees for outstanding service.

Still other awards will support Catholic education by enabling students to attend schools. The Foundation will again partner

with the Children's Education Fund for a special grant that is matched both locally and nationally and results in \$200,000 in financial aid to needy students in Diocesan Catholic elementary schools. Financial Support was also awarded for the summer 2013 program at the Debusk Enrichment Center for Academically Talented Students for those with a financial need, and Catholic High School Scholarships.

Grants will help the Diocesan Catholic Schools Office purchase iObservation software and Holy Trinity Catholic School purchase technology for eight classrooms. Another grant to Catholic Charities will help the Brady Center (elderly and family services) to relocate from Elm Street to a temporary site for 3-5 years until a permanent facility is secured.

"During this season of thanks, we count our blessings for generous donors whose investments allow us to meet the urgent needs of our Catholic community," says Ed Schaffler, president and CEO of The Catholic Foundation. "These fall grants will ensure that our children have proper school facilities, educational materials and tuition assistance, that several buildings throughout the Diocese have proper heat, and that senior citizens have a place to go." 🙏

## DECEMBER 12, 2012 6<sup>TH</sup> ANNUAL ADVISORS SERIES



More than 200 were in attendance for the 6th Annual Advisors Series for Estate and Wealth Management Professionals featuring Jonathan Blattmachr.



Tom Codd, Ed Schaffler, Katherine Day, Adelle Toussant and Jaynie Poff of Bishop Lynch, and Tom Merkel



## CATHOLIC FOUNDATION SUNDAY

Members of all 75 parishes in the Diocese of Dallas took a moment recently to celebrate the work of The Catholic Foundation during Catholic Foundation Sunday. The weekend of October 13-14 was the first time all parishes heard the same message about the contributions of the Foundation and its legacy for the Catholic church of North Texas.

In a letter read to all diocesan parishioners, Bishop Kevin J. Farrell noted that virtually every parish, school and ministry has been touched by a gift from The Catholic Foundation, with more than \$73 million granted throughout the Catholic community in the last 25 years alone.

“Our parishes and schools have been helped with grants that covered building repairs, security systems, air conditioning, new buildings, technology, tuition assistance, scholarships and more,” he said. “The Catholic Foundation is only able to successfully provide financial assistance because of donors who come from all walks of life and financial means . . . I encourage you to learn more about The Catholic Foundation and to remember the Foundation in your prayers.”

## LEGACY CIRCLE DINNER

This year’s Legacy Circle Dinner was held on September 25th. The Catholic Foundation’s Legacy Circle honors individuals who have made long-term commitments to the Foundation through planned gifts such as bequests, permanent endowments or charitable trusts.



Mara and Ray Chavez



Bob and Colleen Baillargeon, Laura and Hugh O'Brien

## ART WALL DEDICATION

The Catholic Foundation honored local painter Cornelious Brackens, Jr. during a public dedication ceremony that celebrated his grand-prize win in the 7th Annual Catholic Foundation Plaza Artists Competition. Brackens’ piece, “When the Troops Come Marching Home to the City of Dallas, What a Day of Celebration That Will Be!” was unveiled at the Catholic Foundation Plaza in the Dallas Arts District.

To read more about the artist and view all of this year’s submissions, visit our website [www.catholicfoundation.com/Learning\\_Current\\_Events](http://www.catholicfoundation.com/Learning_Current_Events).



## 2013 DINNER COMMITTEE

As co-chairs, Jane and Don Hanratty are leading an enthusiastic committee of 73 volunteers who plan to make Catholic Foundation’s 2013 Annual Awards Dinner one of the finest ever.

The event, which will honor Bob Baillargeon, is scheduled for Friday, January 18, at the Intercontinental Dallas. The annual dinner celebrates the work of the Foundation and the generous philanthropists who support the missions of Catholic organizations throughout the Diocese.

Committee members include Cindy and Kevin Bartholomew, Alan Bell, Win Bell, Bob Berg, Jim Burke, Karen Carney, Tom Codd, Lou Ann and Mike Corboy, Bill Crowley, Walt Coughlin, Dan Cruse, Kate Dailey, Carmen and Raul Estrada, Tony Fleo, Bob Galecke, Billy

Gamble, Mike Gruber, Lanay and Rob Hartmann, Vince Hess, and Kasey and Bill Hollon. And Al Hrubetz, Jack E. Irons, Bill Keffler, Chuck Kobdich, John Kraft, Nick Kuntz, Jerry Lastelick, Vicky Lattner, Ann Letteer, Mike Lynch, Dianne and Lee Maas, Robert Mackey, Mike Maguire, Nancy and Pat McLochlin, Jerry McPeters, Tom Merkel, Deacon Brian Mitchell, Brenda and Bob Morgan, Jr., Margot Murphy, and Joe Murphy. Also Lydia Novakov, Pat and Neil O’Brien, Paul Pesek, Tom Poore, Paul Rogers, Peggy and Len Ruby, Bill Schaffler, Susan Stanzel, Kelly and Chris Taylor, Mary Templeton, Mary and Mike Terry, Peggy and Jere Thompson, Wendy Traylor, Gene Vilfordi, Angie and Bill Wallander, Don Wetzel, Laura Fox Williamson, Mark Wischmeyer, and David Woodyard.

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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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