

# THE Good Word

VISIT OUR WEBSITE: [www.catholicfoundation.com](http://www.catholicfoundation.com)

## Creative Grantmaking

Have you ever thought about grantmaking with a creative flair? Last year, The Catholic Foundation distributed more than 1,600 grants totaling nearly \$18.3 million, with the vast majority from funds established by individuals or families who determined the philanthropic intent for the grant recommendation. There is a huge need for general operating support for nonprofit organizations, and that is where many grants are directed. However, there are also opportunities to add some innovation to your giving.

"We'd like donors to know they can also make a difference with a different approach to their grantmaking," said Vice President of Development Cheryl Mansour. "Our staff at The Catholic Foundation has the expertise and ingenuity to assist with designing and

facilitating creative grantmaking opportunities that truly reflect the specific philanthropic dreams you would like to see realized."

Ray and Ruth Hemmig have partnered with The Catholic Foundation for their charitable giving for more than a decade. They have recommended a number of creative grant ideas, including funding a professorship at the University of Texas at Dallas (UTD) in honor of a dear friend and respected leader. When Ray owned a public company, he began working closely with Dr. Constantine "Connie" Konstans at UTD's Naveen Jindal School of Management on adult education opportunities for the executives serving on his corporate board. The founder of the Institute for Excellence in Corporate Governance, Dr. Konstans



conducted research and presented innovative concepts that truly resonated with Ray.

"When we raised this idea as a possible recommendation from the fund we established with The Catholic Foundation, they didn't blink at the challenge. It's a testament to the quality of folks at the Foundation," said Ray.

*(continued on page 4)*



### THE PRESIDENT'S LETTER

Through our proactive grantmaking, we seek out programs to support rather than waiting to be asked for funding from various nonprofit organizations. During the 2017 fall grant cycle the Trustees of the Foundation awarded a grant from the unrestricted Philanthropy Fund to ensure parish leadership are able to attend the Amazing Parish conference being held in Dallas in April 2018.

Amazing Parish conference goals are to revitalize the Church by providing her pastors and leaders with the training, resources and support they need to create vibrant and thriving parishes. Amazing Parish gives busy pastors and their teams the tools they need to transform their parishes—moving from maintenance mode to mission communities that are truly alive!

Father Jason Cargo has attended this conference and said: "Amazing Parish gives tangible and practical ideas and goals that each parish can achieve. If a pastor wants his parish to grow and give more, then he needs to equip himself with the tools from this conference."

Our Trustees agreed that financial obstacles should not impede local pastors and key staff from attending the Amazing Parish conference and I am convinced that the unique model presented at Amazing Parish conferences can benefit each of our parishes. By encouraging and supporting our parish leadership, we bolster our entire Catholic community.

Both proactive and reactive grantmaking are essential in meeting our community's immediate needs and fulfilling both short- and long-term philanthropic visions.

Wishing you all God's blessings. 🙏

J. MATTHEW KRAMER

# A Strong FOUNDATION

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## IN MEMORIAM: *Regis Campfield*

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It is with great sadness that we mark the passing of Regis William Campfield – a man of faith and family, a well-respected legal scholar, a wise professional advisor and a cherished friend.

As a member of The Catholic Foundation Advisory Council, Regis helped launch The Catholic Foundation's Advisors Series for Estate and Wealth Management Professionals 11 years ago. His expertise and friendship over the years has been invaluable, and his absence this year is deeply felt.

Regis taught Wills and Trusts, Estate Planning, and Estate and Gift Taxation at the SMU Dedman School of Law for 32 years. He retired in 2009 as Professor Emeritus and Marilyn Jeanne Johnson Distinguished Law Faculty Fellow. As Founder and Chair of the Notre Dame Tax and Estate Planning Institute, Regis directed and grew the program into one of the largest preeminent tax institutes in the country. He authored

many books and articles including *Taxation of Estate, Gifts and Trusts* (now in its 23rd edition), *Fiduciary Tax Guide*, and *Taxation of Income*.

His numerous awards and recognitions included a lifetime achievement award from the National Association of Estate Planners & Councils; Notre Dame Law School's 5,000+ volume collection in estate planning being named the Regis and Mary Campfield Collection in Estate Planning; and the Person of the Year Award in 2009 from the Notre Dame Club of Dallas.

Thank you Regis, for your wisdom, support and friendship. You are dearly missed and forever appreciated. 🐟

## Outgoing Trustees



Seasoned board member **John Landon** begins his second year as Chairman of the Board and several trustees complete their term at the end of 2017.

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*“As 2017 comes to a close, I would like to take this opportunity to thank our past immediate chair and outgoing trustees for the gifts of leadership, experience and dedication they brought to the Board” – John Landon*

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“As 2017 comes to a close, I would like to take this opportunity to thank our past immediate chair and outgoing trustees for the gifts of leadership, experience and dedication they brought to the Board,” says John Landon, Chairman of the Board of The Catholic Foundation. “We look forward to our continued collaboration with Vicky, Win, Brad and Monica in the future, and are sincerely thankful for their hard work, enthusiasm and wisdom that has greatly benefited The Catholic Foundation and our community.”



**Vicky Lattner** completed seven dedicated years of service to our Board of Trustees. The first female chair since the founding of The Catholic

Foundation in 1955, Vicky led the Board with strategic vision and wholehearted commitment thanks to her unique combination of professional and nonprofit experience.

**Dr. Monica Herrera** served on the development, audit & administration, and distribution committees as a Trustee. She has dedicated herself to The Jethsuby Scholarship Fund at The Catholic Foundation, established by Dr. and Mrs. Mauricio Delgado. The fund provides tuition assistance so more local Hispanic students can attend Catholic schools. Monica has helped grow the fund financially and increase the impact on children served.

**Brad Camp** has graced so many Catholic Foundation events and programs, it is rumored he has yet to miss one. His dedication to education is unsurpassed and benefited the Foundation greatly. He has

served as Secretary and Development Chair as well as on the audit & administration, executive and distribution committees.

**Win Bell** has offered a tremendous amount of leadership and expertise as a Trustee. He led the audit & administration committee as well as the distribution committee as Chair. He served as Secretary and also on the investment, development, executive and governance committees. The Foundation has benefited greatly from his experience and knowledge through the years. 🐟



L to R: Brad Camp, Dr. Monica Herrera and Win Bell

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### BEQUESTS AS A PHILANTHROPIC LEGACY

Sometimes the simplest giving vehicle can be the best. A charitable bequest is one of the easiest ways to make a lasting gift that will yield positive impacts after you are gone.

You can determine if a bequest is used for a general or specific purpose, providing the peace of mind that your gift will be used as intended. If you change your mind about a recipient or cause, a bequest can be modified at any time. Outright gifts to a qualified charity (including The Catholic Foundation) from your estate are entirely free from federal estate taxes.

The most popular type of charitable bequest, a general bequest, simply leaves a specific dollar amount to your designated charity or to The Catholic Foundation. You can also gift a specific asset, such as a specified stock, real estate, or a vacation home.

Another kind of bequest involves leaving a percentage of your overall estate or a residuary estate to The Catholic Foundation. If fortune changes the size of the estate over the years, this bequest will change in the same proportion.

A residuary bequest is used to give a charity all - or a portion of - one's property after all debts, taxes, expenses and all other bequests have been paid. A common residuary bequest involves leaving "the rest of the property" to The Catholic Foundation.

A contingent bequest is used to provide for the situation when a beneficiary dies before you or disclaims the property. Plan ahead and consider naming The Catholic Foundation as the contingent beneficiary. This will ensure that the property will pass to The Catholic Foundation in one of these situations rather than to unintended beneficiaries.

The Catholic Foundation welcomes the opportunity to discuss bequests with you and/or your professional advisor as part of your estate planning. Please contact us at 972-661-9792 to learn more.

\*Keep in mind that changes in tax law could make a significant difference in your estate planning, so stay informed and ask your professional advisor. 🐟

### DONOR PROFILE: Monsignor John T. Gulczynski

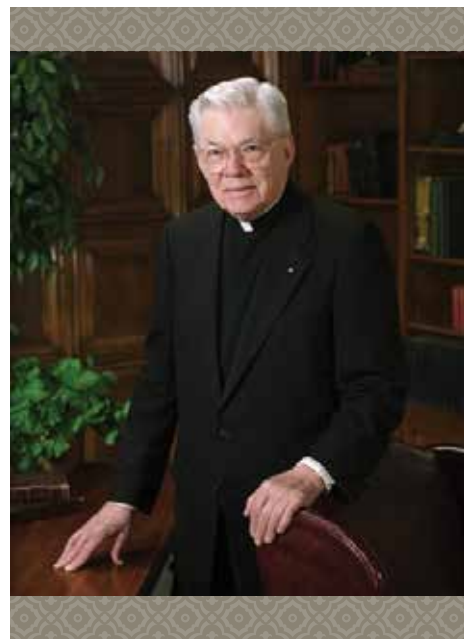
Monsignor John T. Gulczynski was born August 26, 1911 in Wilmington, Delaware and was ordained to the Holy Priesthood on June 7, 1936 in Sacred Heart Cathedral by His Excellency, Most Reverend Joseph Patrick Lynch, Bishop of Dallas. In 1952 His Excellency, Most Reverend Thomas K. Gorman, then Bishop of Dallas, established the new Parish of St. Thomas Aquinas, Dallas, Texas and appointed Monsignor John as its first pastor where he served until his retirement on June 24, 1989 and served as Pastor Emeritus until his death.

During his lifetime, Monsignor John was gifted with a strong faith as well as shrewd

investing skills and a knack for building. He was also very passionate about serving the Catholic elderly. When he passed in 2004, he bequeathed monies to The Catholic Foundation to establish The Leon and Victoria Gulczynski Endowment Fund of The Catholic Foundation in honor of his parents.

Monsignor hoped that with this legacy, he could assist with the construction, expansion or maintenance of new or existing Catholic retirement facilities or nursing homes located within the Diocese of Dallas. Since the inception of the fund in 2005, The Catholic Foundation has honored Monsignor Gulczynski's vision with grants to St. Joseph Village Chapel in Coppell and Saint Joseph's Residence in Oak Cliff.

Since 2007, St. Joseph's Residence has been the recipient of almost \$1.86 million in grants towards maintenance, construction of a new wing and new roof in 2015 and construction of a new foyer in 2016. Monsignor Gulczynski's legacy lives on



Monsignor John T. Gulczynski

through the endowment he established, and St. Joseph's Residence is thriving because of his forward-thinking charitable plans. 🐟

# A LIGHT On

## THE CATHOLIC FOUNDATION AWARDS \$787,000 IN GRANTS AT FALL CEREMONY

Six organizations received their first Catholic Foundation grant during the 2017 Fall Grant Ceremony at St. Joseph's Residence. Grants totaling \$787,000 were awarded to more than 17 North Texas churches, schools and community organizations.

These grants provide local schools, churches and community organizations with vital funding for training programs, building renovations, scholarships for Dallas Diocesan Catholic school students and more. Twice per year, The Catholic Foundation distributes community grants. Combined, the 2017 spring and fall community grants total approximately \$1.8 million.

"Whether for training programs, building renovations, or disaster relief for our fellow Texans in Houston, these grants are imperative to moving the community forward," said Matt Kramer, President and CEO of The Catholic Foundation.

Grants are made from the unrestricted Philanthropy Fund and several restricted funds of The Catholic Foundation. Individuals or families, named or otherwise, establish restricted funds at the Foundation to benefit their communities today and for future generations.

The 2017 fall grant recipients are below. First-time Catholic Foundation grant recipients are marked with an asterisk.

<b>AUDUBON TEXAS*</b> Scholarships for Students Attending Dallas Diocesan Catholic Schools	<b>THE BELLA HOUSE*</b> Renovation of Second Bella House	<b>BIRTH CHOICE</b> Salary for Education Program Coordinator
<b>CATHOLIC CHARITIES OF DALLAS</b> Hurricane Harvey Relief	<b>CATHOLIC CONFERENCE &amp; FORMATION CENTER</b> Laundry Room Renovation	<b>CHILDCAREGROUP*</b> Renovation of Sanier Center
<b>DALLAS HOLOCAUST MUSEUM/ CENTER FOR EDUCATION &amp; TOLERANCE</b> Scholarships for Students Attending Dallas Diocesan Catholic Schools	<b>DIOCESE OF DALLAS</b> 2018 Amazing Parish Conference	<b>EPIPHANY QUASI-PARISH</b> Construction of Driveway, Parking Lot & Sidewalk
<b>IN MY SHOES, INC.*</b> Purchase of Two New Minivans	<b>LIFE PERSPECTIVES*</b> Training for After Abortion/ Miscarriage Supporters	<b>NATURAL FAMILY PLANNING CENTER OF DALLAS</b> Funding for Spring 2018 Training Program
<b>NORTH TEXAS FOOD BANK</b> Establishment of the Jan Pruitt Community Center	<b>ST. ALBERT THE GREAT PRIORY*</b> Relocate HVAC System & Replace Two Water Boilers	<b>ST. BERNARD OF CLAIRVAUX CHURCH</b> Restroom Renovations
<b>ST. JUDE CATHOLIC CHURCH</b> Sound System & AV Equipment	<b>SMU CATHOLIC CAMPUS MINISTRY</b> Funding for "Jericho" Retreat Opportunities for Students	<b>WORK OF HEART AWARD</b> Support for the Foundation's program honoring Catholic School employees
In addition, grants were awarded to support Catholic High School Scholarships.		

### Creative Grantmaking

(continued from page 1)

In March 2013, UTD announced the Constantine Konstans Professorship in Accounting and Corporate Governance to honor the life and work of Dr. Konstans and support in perpetuity his academic research. Dr. Konstans passed away a few months after, but not before receiving numerous accolades and recognitions.

A challenge grant is another creative option that compounds the impact of the gift, where a grant is made on the condition that other monies must be secured, either on a matching basis or via some other formula, usually within a specified period of time, and the charity then asks its donors to give an amount equal to the challenge grant. If donors meet the challenge, the nonprofit then receives the full amount of the grant in addition to the money raised.

### Would you like to create change?

- Help facilitate a new direction for a charity
- Take an organization to the next level
- Create a space where young people want to gather at your parish
- Encourage life skills with a community garden at a Catholic school
- Provide specific experiences in arts, culture, science or history for local students
- Help your favorite nonprofit kick off a new program by funding the program manager's salary

Put some imagination behind your charitable planning and make a unique impact. We're here to help. 🙏



# 2018 CATHOLIC FOUNDATION AWARD DINNER COMMITTEE



1 L-R: Dan Novakov and Scott Moore  
2 L-R: Lydia Novakov and Gail Madden  
3 L-R: Jim Moroney and Chris Taylor

4 L-R: Don Hanratty and Mary Templeton  
5 L-R: Tim and Mary Rooney  
6 L-R: Vince Hess, Danni Flaherty and Brad Camp

7 L-R: Thom and Jan Schleim  
8 L-R: Rosemary Enrico, Marianne Staubach, Jennifer Gates and Margo Keyes

Lydia and Dan Novakov and Mary and Rich Templeton are serving as co-chairmen of the 2018 Award Dinner Committee for the 36th annual Catholic Foundation Award Dinner on Saturday, February 3, 2018 at the Hilton Anatole in Dallas. The Dinner Committee members for this year are:

Sandy and Victor Arias  
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Marianne and Roger Staubach  
Kelly and Chris Taylor  
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Erin and Robert Thoele  
Janet and Frank Ventura  
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**SEATING IS LIMITED!**

To pre-reserve your table at the 2018 Annual Award Dinner, please call 972-661-9792, email Linda Scheets at [lscheets@catholicfoundation.com](mailto:lscheets@catholicfoundation.com) or visit [www.catholicfoundation.com](http://www.catholicfoundation.com).



**Thank you** to our speakers, Jonathan G. Blattmachr and Jeff Glickman, our wonderful corporate sponsors, and the many friends and participants who came to the December 13, 2017 Professional Advisors Series at The Belo Mansion.

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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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