

THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

DONOR CONTRIBUTIONS, FOUNDATION GRANTS DELIVER STRONG COMMUNITY IMPACT

For nearly 70 years, The Catholic Foundation and the generosity of our donors have positively influenced thousands of people throughout North Texas and beyond.

In 2022, the Foundation's philanthropic impact continued to expand as it surpassed \$260 million awarded to churches, schools and charitable organizations over time.

"Through strong and weak economies, our donors have consistently demonstrated their desire to support organizations and causes that are meaningful to them," said Matt Kramer, president and CEO of The Catholic Foundation. "Many donors of the Foundation are social entrepreneurs in that they seek out new ways to help those in need."

The desire for donors to give back to their community, combined with the Dallas region having a stronger economy than many other areas, plays a role in the rise of donor contributions in recent years.

Other factors such as the surge of relocations of individuals and families to North Texas provides a philanthropic platform for ambition.

During the past 10 years, charitable giving in the Dallas area has been noticeably reinforced by individuals investing more time to establish

charitable giving goals that has, in turn, helped establish new faith-based programs.

And because the Dallas area relies so much on a large volunteer base, many are inspired to make their community stronger because of their faith.

"When you combine faith with hope and charity, people who live without a lot of life's most basic essentials and the organizations that serve those in need, win," said Kramer, noting that Catholic Foundation distributions were \$182 million during the past 10 years alone."

"The Sky's The Limit"

One example where the Foundation made a significant impact in 2022 is at Bishop Dunne Catholic School where a \$100,000 grant, along with funding from other organizations and contributors, immediately enhanced learning by students in the school's renovated GeoTech and design/gaming labs.

"We had the dream of this project to redo our labs," school president Mary Beth Marchiony told guests before a ribbon cutting of the new labs. "With the generosity of donors, we were able to make that happen. With the setup and the new technology, we think the sky's the limit."



Catholic Foundation trustee Kara Gehan, who served on the Foundation board of trustees from 2017-2022, and Foundation president and CEO Matt Kramer participate in the ribbon cutting at Bishop Dunne Catholic School's dedication of its new GeoTech and Advanced GIS, Advanced Gaming and Design Labs, partially funded by a grant from the Foundation.

Christine Voigt, Bishop Dunne's director of instructional technology, calls the refurbished classrooms flexible learning spaces, comparing them to the type of tools used by professionals in the business world.

Prior to the renovation, most of the computers used by students were seven to 12 years old.

(continued on page 5)



THE PRESIDENT'S LETTER

Following another year of growth in terms of newly established funds and an expanded base of organizations that received grants thanks to donor generosity, The Catholic Foundation is poised for a strong 2023.

Entering the New Year, our staff and board of trustees look forward to having more in-person meetings with donors, people interested in learning more about the Foundation, Advisory Council members, professional advisors, Catholic school leaders, clergy and charitable organizations.

As those conversations occur, we're not only nurturing deep-rooted and trusted relationships, but we're building bridges between charitably minded people and organizations that represent the causes they'd like to support.

When those connections occur, wonderful things happen.

Families are able to send their sons and daughters to Catholic schools. Children develop a love for science, technology, education and math. Food and clothing reaches people in need of life's most basic essentials. Leaky roofs, worn out air conditioners and tattered carpet is fixed and replaced among many other things.

As we near our 70th year as a community foundation independent of the Diocese, our team takes pride in being good stewards of donor resources even after the individuals are gone.

As we help donors create charitable legacies with customized plans unique to their passion, our pledge remains that of being trusted charitable giving advisors.

Thanks to our donor generosity, we're pleased to have distributed more than \$260 million over time to religious, charitable and educational organizations both Catholic and non-Catholic as of the end of the year.

As you'll read in this edition of *The Good Word* as well as expanded news on our website and social channels, we look forward to being a part of your philanthropic pursuits in 2023.

Here's to a successful, healthy, joyful and prosperous year for you and your loved ones. 🙌

J. MATTHEW KRAMER
President and Chief Executive Officer

A Strong FOUNDATION

AWARD DINNER COMMITTEE RECOGNITION

Committee Prepares To Celebrate Philanthropic Pioneer



2023 Catholic Foundation Award Committee chairs Lydia and Dan Novakov

Lydia and Dan Novakov, past recipients of The Catholic Foundation Award, are serving as chairs of the Dinner Committee for the 40th annual Catholic Foundation Award Dinner to take place on Saturday, Feb. 4, 2023, at the Hilton Anatole in Dallas.

We are grateful for the support of the entire Dinner Committee as they prepare for the event that will honor Jack E. Pratt, Sr. for his many years of distinguished service that supports religious, charitable and educational needs in the local Catholic community. 🐟

The 2023 Catholic Foundation Award Dinner Committee Members

Lydia and Dan Novakov, <i>Chairs</i>	Julie and Frank Hubach	Maryanne and Dan Odom
Sandy and Victor Arias	Mary Emma and Al Karam	Chris and Joe Popolo
Mary Lynn and Fred	Chrissie and Bill Keffler	Michal Powell
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Mark Howard	Margot and Tom Murphy	
	Kathy and Joe Murphy	

TO RESERVE A TABLE OR INDIVIDUAL SEATS

for the 2023 Annual Award Dinner, please either register online at www.catholicfoundation.com, email Linda Scheets at lscheets@catholicfoundation.com or call 972-661-9792.

TELEVISED MASS TO CONTINUE IN 2023

Catholic Foundation Donors Encouraged to Support Homebound Ministry

Since Palm Sunday 2020, The Catholic Foundation has been honored to serve as the presenting sponsor of the weekly televised Mass.

In hundreds of hand-written letters sent by donors both Catholic and non-Catholic, people shared how the televised Mass has brought God, and love, into their home.

Those who took the time to write us shared how they were strengthened by participating in the liturgy.

Even without the pandemic, many shared how they were unable to attend Mass in person for different reasons.

"The Foundation is grateful to donors, past and present for enabling us to serve as the presenting financial sponsor for more than 2 ½ years," said Matt Kramer, president and CEO.

Starting January 1, the Diocese of Dallas has chosen to fund the weekly televised Masses in English and Spanish to connect people who are sick and or homebound with their parish communities.

"We're grateful to have been able to respond to the needs of the Diocese during the peak of the pandemic and help cover the cost of getting the Masses on TV for easy access to those homebound or hospitalized," said Kramer. "Our ongoing prayer is for people to support the Diocese and its homebound ministry."

Funds previously earmarked for the televised Masses in 2023 will be distributed to churches, schools and charitable organizations as part of the Foundation's grant distribution program. 🐟

FUTURE CONTRIBUTIONS

can be made online with your credit card information at www.cathdal.org/give or sent via mail to:

Catholic Diocese of Dallas
Attn: Homebound Ministry
3725 Blackburn Street
P.O. Box 190507
Dallas, TX 75219-0507



In hundreds of hand-written letters sent by donors both Catholic and non-Catholic, people shared how the televised Mass has brought God, and love, into their home.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Senior Vice President of Donor Relations

WHAT'S THE VALUE IN CHARITABLE GIVING?

This is the second in a series of columns about the tangible benefits of philanthropy.

An act of charity comes from an individual who wants to do good and has an unselfish heart. Giving your time, talent and treasure can positively impact your mind and body, and leave you with a feeling of fulfillment, happiness and joy.

Giving back to the community can have a profound impact on our lives. Whether it is in the form of tuition assistance or building Catholic infrastructure for instance there is a rewarding feeling and sense of accomplishment that you helped people and organizations make an impact. In many cases, you have done something to show appreciation for the blessings you have received.

You are setting an example for friends and family who can be inspired to give by observing what you have done and the impact your gift made. In many cases, there is a ripple effect that started with your gift and in turn was the catalyst to do good for other people or organizations. The leverage you provided has tangible value.

And, you get a tax deduction! While there are some who donate in part to take advantage of the tax deduction, usually tax benefits are secondary - but can't be ignored. A tax deduction means it costs less than a dollar to give a dollar. That leaves more for you to either give more, or to use for your family after the gift has been made.

There are many charitable giving "tools" available that help you maximize your charitable dollars to do the most good while being tax-efficient. A Donor-Advised Fund is a great timing tool to use when you need to harvest gains now,

but you want to avoid capital gains tax or get a deduction in the current year and decide later where your charitable funds should be targeted.

Using appreciated securities can avoid capital gains tax. Gifts of cash are always appreciated, but often you can give more by giving appreciated assets because it avoids capital gains tax. That leaves more in your pocket to give even more if you wish. Even closely held stock, tangible personal property, real estate, mutual funds, qualified retirement plans assets, life insurance, royalty interests, and intellectual property can be used as your vehicle.

If you want to make a difference, do something about a problem, or invest in the future of humanity, call us at 972-661-9792. We welcome the opportunity to work with you and explore the charitable giving options available at The Catholic Foundation. 🐟

DONOR SPOTLIGHT

Peggy & Len Ruby

STRATEGICALLY
MINDED FOR A CAUSE

"Follow your heart, invest your time and resources wisely. Get personally involved." When asked about their charitable philosophy, this short message sums up how the Rubys feel about philanthropy.

Longtime parishioners at St. Pius X Catholic Church, Peggy and Len Ruby take a very organized approach to giving.

"Our support falls into three broad categories: Education, aid for priestly formation and assistance for the poor," says Len. "We look for specific causes within these areas and try to provide help with both our time and resources."

Besides their home parish, the Rubys are passionate about several organizations including Bishop Lynch High School, their local St. Vincent de Paul Conference, the Diocesan Education Endowment Trust (DEET), Catholic Charities Dallas and Holy Trinity Seminary.

The Rubys are equally strategic in terms of how they support the causes that are important to them. First and foremost is their personal

involvement. Besides terms on various boards for the organizations above, Len spent nine years on the board of The Catholic Foundation, ending in a two-year term as chairman. Currently, Len leads the DEET board where he has been a long-term member.

Catholic Foundation Makes Philanthropy Easy

When it comes to financial support for these causes, Peggy and Len turn to the expertise of The Catholic Foundation for assistance in making their philanthropy easier and more taxwise.

"The team at the Foundation is very experienced and really takes the time to ensure that the giving vehicles they recommend are precisely tailored to our needs," says Len. "Each year I have to take required minimum distributions from my IRA. With their capable assistance, we developed a fund that we will use to make five- and six-figure gifts over the next decade. They make the process very simple for us. The Foundation even arranged for our children to recommend grants from our Fund after we are gone. That was important to us."

Len also helps lead the charge in growing an endowment called The Gorman Society, which will ultimately cover the Foundation's annual expenses.

"Such an endowment would allow the Unrestricted Philanthropy Fund to be used exclusively for increasing grants in our community without having to bear the burden for the Foundation's expenses. Greater impact with larger grants is great for both the Foundation and the organizations we serve," says Len.

Thoughtful, decisive philanthropy is part of the Ruby's lasting legacy. The Catholic Foundation is honored to support Peggy and Len in their charitable efforts. 🐟



Peggy and Len Ruby

A LIGHT On

BOARD OF TRUSTEE ANNUAL DINNER

Current and former trustees of The Catholic Foundation met in November to be recognized for their tireless work on behalf of the Foundation.

After Foundation president and CEO Matt Kramer shared how the collective time, talent and treasure of trustees has helped guide and build the Foundation over the past 67 years, board chair Aileen Pratt provided a state of the Foundation report.

Bishop Burns opened the evening to comment on the many important projects taking place in the Diocese of Dallas and Bishop Kelly closed the evening in prayer. 🙏

A. Maria and Mauricio Delgado, M.D.

B. Mike and Mary Terry with Jennifer and John Gates

C. Jeff and Amanda Schiefelbein

D. Becky and David Small

E. John and Nancy Kraft



FIFTEEN GROUPS RECEIVE MORE THAN \$950,000 IN FALL FOUNDATION GRANTS



Congratulations to the 15 local schools, churches and community organizations that received \$957,429 in grants during the Foundation's fall grant ceremony.

Funded by the Foundation's unrestricted Philanthropy Fund as well as funds established by individuals and families to carry out their charitable intentions the grants support various projects including technology enhancements, HVAC repair, mental health programming, student lockers, security upgrades, parish welcome center furnishings, pharmacy expansion and a donation delivery truck.

"These grants will make a lasting and notable impact throughout the greater Dallas community," said Matt Kramer, president and CEO of The Catholic Foundation. "We appreciate the generosity of our donors past and present who make the grants possible. We're also very grateful to our board of trustees who evaluate each grant request which includes a site visit to learn about the specific needs of each organization."

The nearly \$1 million in grants are just a piece of a much larger story. Last year, The Catholic Foundation distributed \$21.5 million through

more than 2,400 grants to 800 organizations. In just the past 10 years, the Foundation has provided \$182 million in grants to the greater Dallas community.

OUR 2022 FALL GRANT RECIPIENTS INCLUDE:

Catholic Campus Ministry at SMU – Neuhoff Catholic Center building repairs

Catholic Chaplain Charity Fund - Parkland Hospital – Support of ministry

Community Does It – Completion of mental health resource center

Cooking for the Crowd – Software system

Dawn of Mercy – Outreach project

Holy Spirit Catholic Church – HVAC

James L. Collins Catholic School – School hall renovations

John Paul II High School – Mental health program

Metrocrest Services – New building construction (*Partial funding provided by the Louise Buhner Endowment Fund, the Olga Faye Harper Senior Citizens Fund and the R. Cardis & DeLee Stubbs Foundation*)

Prince of Peace Catholic Community – Parish welcome center furnishings

St. Bernard of Clairvaux Catholic School – Student lockers

St. Elizabeth of Hungary Catholic School – I-Ready curriculum

St. Philip & St. Augustine Catholic Academy – Security upgrades

Saint Vincent de Paul North Texas – Expansion of pharmacy

Saint Vincent de Paul Thrift Store – Donation delivery truck 🙏

You can watch the entire fall grant ceremony, and hear remarks from the recipients about the impact the grant will have on their project on the Foundation's YouTube page or on our website, www.catholicfoundation.com, by clicking on the Photo – Video – Audio Library tab located in the About Us-News section.

DONOR CONTRIBUTIONS, FOUNDATION GRANTS

(continued from page 1)

Modernized Labs Set Students Apart

Today, with modern equipment and accessories, and a more modern and cleaner look with enhanced wiring in the rooms, students like junior Gaby Green, can work on real-world projects that help influence the life of people locally and as far away as South Africa.

In class, Green, who is actively involved in cheerleading, volleyball and numerous academic and service organizations, has already seen how the new lab equipment helps set students apart from other schools.

During the fall semester, she enjoyed using the geographic information system and H02 Open Street Map system to work with others students to evaluate 10,000 facilities and map the infrastructure in South Africa. That project helped to identify which facilities are most susceptible to flooding. In turn, officials in the country can use the data compiled by students to help with rebuilding and renovation efforts.

Other projects that have recently taken place in the modernized labs involve identifying areas where crime is more prevalent in Dallas, learning where homicides and weapons are most used in crimes and studying the health-related rankings of restaurants - all of which assist public officials to enhance or modify plans to improve the quality of life for people in the community.

“The Chronicle of Philanthropy ranks Dallas among the most generous cities in the nation in terms of charitable giving,” said Kramer. “That speaks well for organizations whose mission involves feeding, clothing, teaching and comforting individuals and families who need assistance and we’re very thankful for the huge impact of our donors.” 🦋

ADVISORS SERIES

SPONSORSHIP RECOGNITION

We’re thankful to all our sponsors of the 16th annual Advisors Series For Estate and Wealth Management Professionals.

In November, The Catholic Foundation hosted Paul S. Lee, chief tax strategist at Northern Trust Corporation, who spoke on “Top Planning Ideas Today: Covid, Congress, Charity.”

The Advisors Series seminar provided two hours of continuing education credit to guests and took place at the Arts District Mansion, formerly known as the Belo Mansion, in downtown Dallas.

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Special thanks to our Advisory Council members Santo Bisignano, Jr., Dan Novakov and Lora Davis for their expertise in helping plan the seminar. 🦋

SAVE THE DATE

The next Advisors Series seminar is
Nov. 16, 2023

SUSTAINED STEWARDSHIP HONORED DURING LEGACY CIRCLE DINNER

Individuals and families that have made long-term commitments to The Catholic Foundation were honored during the 13th annual Legacy Circle Dinner.

As a special treat, sustained stewardship guests learned more about the Catholic Music Initiative as co-founders Dave and Lauren Moore - the music ministers of the televised Diocese of Dallas English Mass for 2 ½ years - spoke and performed.

“Your philanthropic heart, combined with your vision for making a lasting impact in this world, are what we celebrate,” Catholic Foundation president and CEO Matt Kramer told Legacy Circle members. “Through your personalized charitable plans, you strengthen not only the Catholic community, but the

broader community. You help the poor. You support our educational institutions. You help build churches. You repair aging infrastructure. You endow so many worthy efforts. And you promote solid Catholic ideals.”

Kramer thanked Legacy Circle members and invited them to share their stories about how they partnered with The Catholic Foundation with their friends and acquaintances.

“From personal experience, there’s no better testimony than that which comes from a trusted friend, neighbor, co-worker or fellow parishioner,” said Kramer.

Catholic Music Initiative Shares Spirited Growth In Word & Song

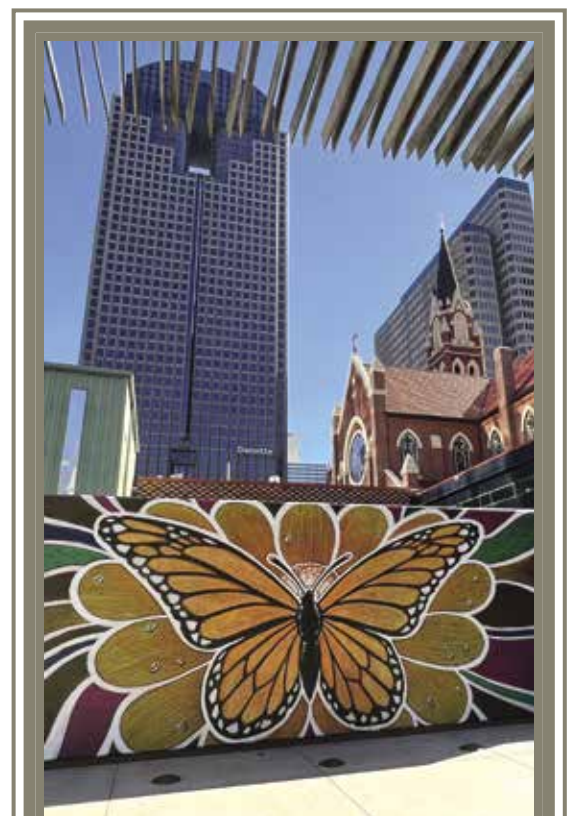
Before Msgr. Milam Joseph concluded the evening in prayer, the Moores shared how their ministry of Catholic music began, and evolved with the support of Foundation donors who were early supporters of the Catholic Music Initiative.

The Moores explained that the Catholic Music Initiative is a nonprofit with a vision to compose beautiful liturgical music; to create a collaborative platform that leavens the heritage of our faith through the formation of dedicated composers and musicians giving glory to God; and to bring the focus back to Jesus in the Eucharist with nights of Adoration, solid Catholic hymns, and education in our history and tradition.

“Worship should be an experience that reawakens childlike wonder, joy, and peace,” said Lauren and Dave who described their audience as a combination of seekers, wanderers and disciples. “When music is simple and easy to join in, we feel safe, free, and invited to enter into a deeper and more powerful relationship with the heart of God. God doesn’t ask us to have it all together. He simply says, ‘Come to me.’” 🦋



Dave and Lauren Moore, founders of The Catholic Music Initiative, perform at the Foundation’s Legacy Circle dinner.



The largest monarch butterfly in Texas flew into the downtown Dallas Arts District in October as the Foundation celebrated the 17th annual Art On The Plaza winning artist Robert Wayne Opel and his masterpiece, “Wings Of Joy.”

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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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Dallas, TX 75251

info@catholicfoundation.com

For additional information regarding the Foundation, please call 972-661-9792 or refer to: www.catholicfoundation.com



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SAVE the DATE

40th Annual Catholic Foundation Award Dinner
February 4, 2023

Catholic Community Network Panel
March 8, 2023

Circle of Life Seminar
March 11, 2023

Spring Grant Distribution Ceremony
April 21, 2023

17th Annual Professional Advisors Series
November 16, 2023

12222 Merit Drive, Suite 850
Dallas, TX 75251

