

*focused*  
forward

2015 ANNUAL REPORT



CATHOLIC  
COMMUNITY  
FOUNDATION®





Dear Friends,

Fiscal year 2015 was a year of great progress at the Catholic Community Foundation. As the pages that follow will detail, we experienced tremendous growth in our new funds, donor relationships, and grantmaking efforts—our grantmaking alone increased by more than \$1 million this year. I continue to be humbled by the extraordinary generosity of all the donors and community leaders who partner with the Foundation to lift up our Catholic community together.

I am particularly humbled by this generosity in a year when our local Catholic community experienced both challenges and pain. In this context, the grace and vision of the Foundation's partners is more evident to me than ever. Amidst current turmoil, we saw our donor partners focus time and again on the future strength and vitality of our community, investing in the future of our Church's ministries and committing once again to the tie that binds us all: our shared faith.

In this report, you'll read stories about a permanent commitment made to a religious order in loving memory of a priest who transformed a life with his ministry; parish leadership that invested in and committed to the perpetual future of their parish community with a permanent endowment at the Foundation; and the Foundation's leadership in a collaborative effort to support, uplift, and transform struggling Catholic elementary schools into thriving, stable communities providing excellence in education and sharing Christ's love with our youth.

In each of these stories, our donors and partners have demonstrated a laser-like focus on ensuring the ministries of our faith are available and supported into the future. At the Foundation, we remain similarly focused on investing in the future of our Catholic community through the integrity of our work and the strength of our partnerships. We know that together, we can ensure every generation will benefit from the transformational ministries and sacraments of our Catholic faith.

And so, it is with deep appreciation to the Foundation's Board of Directors, the Foundation's staff, and each and every donor, institutional partner, supporter, and friend of the Foundation that we proudly present this year's annual report, "Focused Forward."

Sincerely,

A handwritten signature in black ink that reads "Anne". The signature is fluid and cursive, with a long, sweeping tail that extends to the right.

Anne Cullen Miller, MBA  
President



## OUR MISSION

*The Catholic Community Foundation was founded in 1992 with the mission to support financially the spiritual, educational, and social needs of our Catholic community.*

## OUR GUIDING PRINCIPLES

The Catholic Community Foundation keeps faith with its donors through a statement of principles adopted by its Board of Directors. These principles are designed to guide the Foundation in its mission and commit the Foundation to be Catholic, catholic (broad in scope), and candid (to be true to the faith); supportive of a wide range of programs; and accountable to both donors and beneficiaries.



**CATHOLIC IDENTITY** — We reflect our Catholic faith in all we do; embrace the breadth, diversity, and commonality of Catholic interests; and assure that investments and grant recipients are in alignment with Catholic values.

**SERVICE** — We respond to the financial needs of the Catholic community and contribute to effective solutions; collaborate with other nonprofit organizations when consistent with our mission; and provide for the needs of future generations.

**PUBLIC ACCOUNTABILITY** — We recognize and act on the understanding that community foundations are sustained by public trust which is earned by full, open, and public disclosure.

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## 2015 ANNUAL REPORT

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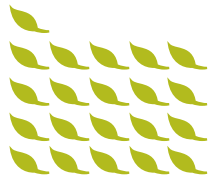
2015

SNAPSHOT

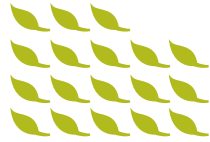
*CCF holds*  
**\$276 Million in Assets**

**63** NEW FUNDS  
OPENED

FUND TYPES



**21** Agency



**18** Endowed



**12** Donor  
advised



**6** Charitable gift  
annuities/trust



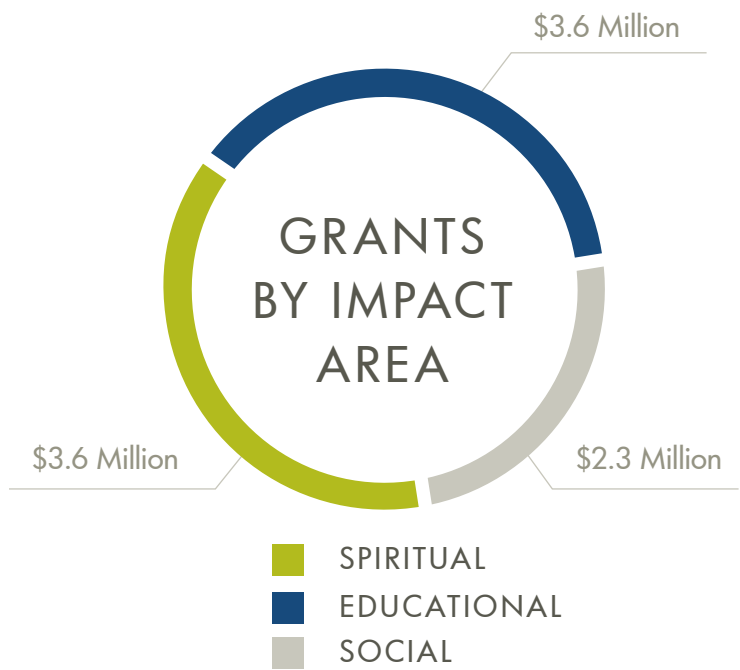
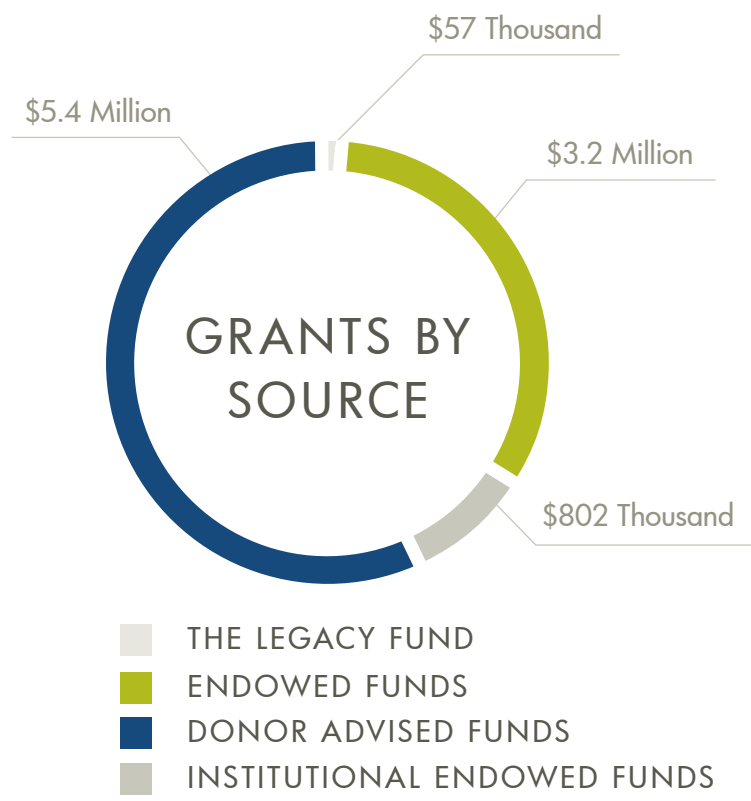
**6** Institutional  
endowed

TOTAL FUNDS  
**1,050**  
AS OF  
06.30.15

**\$27.5M** NEW  
ASSETS

growing sacraments & ministries

*grants distributed*  
**\$9.5 Million**



**2,130** GRANTS DISTRIBUTED

*\*CCF directed grants are inclusive of grants from endowments where a donor has designated a charitable purpose but not a charitable beneficiary. For these endowments, CCF's Grants Committee annually selects charitable beneficiaries that align with the donors' designated charitable purpose.*

**80%**  
 DONOR DIRECTED

**20%\***  
 CCF DIRECTED



## STATEMENTS OF ACTIVITIES

For the years ending June 30	2015	2014
<b>Revenue</b>		
<b>Total Contributions</b>	<b>\$13,900,136</b>	\$15,382,773
Less: Amounts Received for Beneficial Endowments	1,687,468	874,962
Net Contributions	12,212,668	14,507,811
Management Fees	953,609	724,337
Investment Gains (Losses)	(1,309,110)	15,651,538
Gain (Loss) on Charitable Trusts & Gift Annuities	(454,155)	520,009
<b>Total Revenue</b>	<b>11,403,012</b>	31,403,695
<b>Program Grants</b>		
<b>Total Grants</b>	<b>9,529,063</b>	8,047,867
Less: Grants Made on Beneficial Endowments	801,744	621,126
Net Grants	8,727,319	7,426,741
<b>Operating Expenses</b>		
Donor Relations & Development	781,127	833,222
Management & General	790,123	686,208
Grant Services	274,570	242,553
<b>Total Expense</b>	<b>1,845,820</b>	1,761,983
<b>Change in Net Assets</b>	<b>829,873</b>	22,214,971
<b>Beginning Net Assets</b>	<b>117,471,987</b>	95,257,016
<b>Ending Net Assets</b>	<b>\$ 118,301,860</b>	\$ 117,471,987



## STATEMENTS OF FINANCIAL POSITION

As of June 30	2015	2014
<b>Assets</b>		
Cash & Cash Equivalents	\$ 5,972,563	\$ 5,718,780
Investments	264,323,525	269,596,072
Cash Surrender Value of Insurance Policies	4,087,881	3,853,073
Pledges	1,002,462	-
Other Assets	1,075,205	1,091,301
<b>Total Assets</b>	<b>\$ 276,461,636</b>	<b>\$ 280,259,226</b>
<b>Liabilities</b>		
Accounts Payable & Accrued Liabilities	\$ 1,093,706	\$ 645,979
Agency Obligations	121,771,633	127,462,664
Beneficiary Endowments	28,415,016	26,799,539
Charitable Trust & Gift Annuity Obligations	6,879,421	7,879,057
<b>Total Liabilities</b>	<b>158,159,776</b>	<b>162,787,239</b>
<b>Net Assets</b>	<b>118,301,860</b>	<b>117,471,987</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 276,461,636</b>	<b>\$ 280,259,226</b>

*Audited financial statements containing all required disclosures and IRS Form 990 are available at [www.ccf-mn.org](http://www.ccf-mn.org).*

“THE PURPOSE OF  
OUR PARISH IS NOT  
ABOUT MONEY; IT’S  
ABOUT THE MISSION  
OF JESUS. BUT THE  
REALITY IS WE NEED  
MONEY TO FULFILL  
THAT MISSION.”

— Joe Nardi  
Finance Council Chair  
St. John the Baptist Parish,  
Savage





# *focused* forward

## HONORING A BELOVED GODFATHER

DECADES AFTER HER GODFATHER stood at the baptismal font and marked her newborn forehead with the sign of the cross, Mary McKeown found herself pondering the magnitude of his influence on her faith. The pondering begged a response, a way to honor the memory of this exceptional man.

“GO OUT AND  
PREACH THE  
GOSPEL.  
IF NECESSARY,  
USE WORDS.”

— St. Francis Assisi

This year, Mary responded and established an endowment to honor her godfather, Fr. Francis Costiou, O.M.I. Working through the Catholic Community Foundation, she created a fund to provide perpetual support to retired priests from Fr. Costiou’s religious order, the Missionary Oblates of Mary Immaculate (O.M.I.). The endowment is Mary’s way of acknowledging the important role her godfather played in helping her become a person of faith.

#### **Missionary and Mentor**

Mary was born the youngest of three daughters to a family living in International Falls, Minn., in the 1930s. Her father, a local sheriff, was in his late 40s when Mary was born and it was important to him to choose a godfather who would watch over his new daughter.

He turned to Fr. Costiou, a family friend who served as a missionary priest to Catholics in the sparsely populated area. Fr. Costiou needed to secure special permission to accept the role, but he did so eagerly,

embracing his responsibilities as godfather. His first act was insisting the new baby be named Mary Jane, after the Blessed Virgin and Oblate patroness St. Jane Frances de Chantal.

Because Mary’s godfather served Catholics spread across a large area, she only saw him a few times a year. Despite that, he worked to foster her faith and remained a strong presence in her life, attending her First Communion, her Confirmation, and regularly sending her books about the lives of saints.

Fr. Costiou was born in France in 1878 and came to Koochiching County in 1919. “He had a strong French accent which made him hard to understand at times, but he was a joyful, loving man,” Mary recalled. “There was a quote of St. Francis Assisi’s he liked to repeat: ‘Go out and preach the Gospel. If necessary, use words.’”

Fr. Bill Morrell, O.M.I., believes Fr. Costiou’s favorite quote nicely sums up the work of their order, which is dedicated to the poor and marginalized. “Fr. Costiou is typical of those who are called to be missionaries,” observed Fr. Morrell. “He did his best work when drawn out of ordinary circumstances.”

Mary’s father died when she was 11 years old, and Fr. Costiou became a father figure as well as



a spiritual mentor. “When I was a teenager,” said Mary, “he tried his best to keep me on the straight and narrow.”

When Mary was still in her teens, Fr. Costiou was transferred to Manitoba and later to rural Georgia and Florida, while Mary’s family moved to St. Paul. Despite the distance, Mary’s godfather stayed in contact. When she married in 1956, he presided at the wedding. Fr. Costiou died in Florida a few years later.

### A Fitting Tribute

Fr. Morrell says endowments like Mary’s are critical. “The number of retired priests exceeds the number of those in active ministry who support their care,” he said. “We’re honored that the endowment recognizes the work of these missionaries. When you look at what they’ve done with their lives, they deserve to be taken care of.”

Mary recalls a time when she was 16 and met with Fr. Costiou at her mother’s request. “I suspect my mother thought I was getting out of hand,” she mused. Her godfather’s response was to give her a rosary that had been blessed by the bishop and to instruct her to join the Legion of Mary, which



she did. She smiles at the memory. “He fulfilled his commitment to my father.”

Mary thinks it’s good for priests like her godfather — who dedicated their lives to service — to know their work is remembered. “What you do for yourself dies with you,” Mary said. “What you do for others lives on.” Mary’s endowment will benefit many people long after she is gone, making it a fitting tribute to a beloved godfather.

“WHAT YOU DO  
FOR YOURSELF  
DIES WITH YOU.  
WHAT YOU DO  
FOR OTHERS  
LIVES ON.”

— Mary McKeown

# Endowed Funds

An endowed fund is a permanent gift that will provide a perpetual source of funding to designated charities or charitable causes. With an endowed fund, charitable giving lives on for generations. Anyone can create an endowed fund at the Catholic Community Foundation to support causes near to his or her heart.

Anunciation Parish Endowment Fund  
Archdiocesan Venezuelan Mission Endowment Fund  
Ave Maria Academy, Maple Grove  
Severne M. Banack Endowment  
Benilde-St. Margarets School Tuition Assistance Fund  
Blessed Virgin Mary Charitable Fund  
Boerboom Funds for Retired Priests  
Jerome Brown Legacy Endowment Fund  
Brya Family Endowment Fund  
Robert and Dolores Buril Fund  
Burns Family Charitable Funds  
Vivian Byers – St. Francis and St. James Fund  
Vivian Byers – St. Matthew Fund  
Carondelet Life Care Ministries Endowment Fund  
Connie D. and William C. Carroll Scholarship Endowment Fund  
Cathedral Foundation Fund  
Catholic Charities Endowments  
Catholic Youth Camp Endowment Fund  
Center for Mission Endowment Fund  
Cerenity-Marian Center of St. Paul Catholic Service to the Elderly Fund  
Joseph and Fern Check Legacy Fund  
Mary Ellen Priebe Conzemius Endowment Fund  
Conzemius Fund for Cretin-Derham Hall  
Cora Cooty Fund  
Rev. Francis Costiou, OMI Memorial Fund  
Crosier Fathers and Brothers Endowment Fund  
Diaconate Educational Assistance Fund  
William and Corinne Dietrich Charitable Fund  
Edward and Margaret Dudley Family Charitable Fund  
Family of Faith Support and Education for Priests Endowment  
A. O. Elder Family Fund  
Marilou Eldred, Ph.D. Legacy Fund  
Estrem Family Endowment Fund  
Family of Faith Education Assistance Endowment  
Family of Faith General Undesignated Endowment  
Family of Faith Religious Education Endowment Funds

Family of Faith Tuition Assistance Endowment Funds  
Raymond and Genevieve Feltl – St. Joseph Education Endowment Fund, Hopkins  
Florence A Florance Scholarship for Academy of Holy Angels and DeLaSalle High School  
FOCUS (Friends of Catholic Urban Schools) Endowment  
Franciscan Retreats Endowment  
Msgr. Francis J. Garvey Endowment Fund  
Richard and Delphine Goldstrand Charitable Fund  
Good Shepherd School Education Endowment Fund  
Tom and Joleen Greene Family Endowment  
John and Patricia Gries Endowment  
Growing in Faith Fund  
Guest House Endowment Fund  
Guild of Catholic Women Endowment Fund  
Haugh Family Fund for Catholic Teachers, Elementary Schools, Tuition Support, and Religious Education Directors  
Hazel C. Heim Fund  
Msgr. Patrick Hessian Fund  
Endowed Earl and Kathy Hoagland Sacred Manoomin Fund  
Thomas and Patricia Holloran Catholic Charities Fund  
Reverend Leo Huber Endowment  
Immaculate Conception Church Endowment  
Immaculate Heart of Mary School Tuition Assistance Fund  
Jesuit Retreat House Endowment Fund  
Jeffery Paul Johnson Memorial Fund  
Maureen Dolan Jurek Charitable Fund  
Sr. Brenda Kelzer Scholarship Fund  
Abigail Kiesner Fund for the Advancement of Professional Women  
Dr. Ellsworth and Mae Kneal Endowment  
Elaine and Allen Kolles Endowment Fund  
Carlo LaManna Family Scholarship Fund  
Carlo LaManna Family Seminary Scholarship Fund  
Fr. Patrick Lannan Memorial Fund  
Lannan Family Fund for St. Thomas Academy  
Robert E. and Florence D. Larkin Charitable Fund

Lenzmeier Family Fund  
Clara Lindley Fund for Clergy  
Erasmus C. Lindley Charitable Fund  
Catherine O'Connor Marien Legacy Endowment Fund  
McGlynn Family Endowment for Murray Institute  
O. Bernard and Dorothy Ann McGuire Tuition Assistance Fund for St. Mark's School, St. Paul  
Donald and Bernice Messerich Family Charitable Fund  
Milroy Family Designated Endowment Fund  
Phillip and Barbara Milroy Cathedral School Scholarship Fund  
Family of Faith Ministerial Enrichment Fund  
Missionary Sisters of St. Peter Claver Endowment Fund  
Molz Family Fund  
Endowments from the Estate of Katherine Mooney, supporting:  
– The Basilica of St. Mary  
– Catholic Charities  
– Saint John Vianney College Seminary  
– St. Olaf Church, Minneapolis  
– St. Stephen Church, Minneapolis  
– Visitation Church, now merged with Annunciation Church, Minneapolis  
Brown Mountain Family Fund  
W. Edward and Mary Hester Mullin Fund  
Catherine G. Murphy Funds for Catholic Charities, The Saint Paul Seminary, and St. Thomas More in St. Paul  
Murray Institute Fund  
Nativity of Our Lord Endowment Fund  
Nativity of Our Lord Tuition Scholarship Endowment Fund  
Nazareth Hall Funds  
New City Ministry Fund  
Newman Center - University Christian Studies Program Endowment Fund  
Nilles Family Fund  
Alex and Loretta Novak Family Fund  
Our Lady of Good Counsel Fund  
Our Lady of Peace Home Endowment Fund  
Rev. William J. Paron Endowment Fund  
Patrons of St. Anne's School Endowment Fund

Valeria Pezzani Endowment Fund  
 Piche Family Fund  
 Anthony and Melva Pierce Endowment  
 Arthur J. Popehn Family Foundation  
 Donald and Veronica Poquette  
 Charitable Fund  
 Family of Faith Preaching and Presiding  
 Institute Fund  
 Family of Faith Priests Continuing  
 Education Fund  
 Ravenhorst Family Fund  
 Dr. John Regan Fund for Tuition Assistance  
 Donald and Jean Regan Fund  
 Carl J. Remick, Jr. Fund  
 Jim and Chriss Renier Scholarship Fund  
 Reserve TWP Fund  
 Family of Faith Respect Life Program  
 Richard G. and Dorothy E. Revord Family  
 Charitable Fund  
 Cole Richardson Endowment for St. Joseph's  
 School, West St. Paul  
 Most Reverend John R. Roach Fund  
 Sacred Heart Fraternity of Secular Franciscan  
 Endowment Fund  
 Saint Paul's Outreach Endowment  
 Saint Thomas Academy Tuition  
 Assistance Fund  
 George and Evelyn Sayer Scholarship Fund  
 for St. John the Baptist, Excelsior  
 Ronald and Nadine Schoenborn Endowment  
 Kenneth W. Scully Endowment  
 David and Patricia Serreyn Endowment Fund  
 Dr. Gregory Sheehan Scholarship Fund for  
 Saint Agnes School  
 Sisters of the Good Shepherd  
 Endowment Fund  
 Skipper Slawik Fund  
 Slipka Family Charitable Fund  
 George and Jeanne Slipka Charitable Fund  
 Family of Faith Spiritual Formation – Catholic  
 School Teachers Fund  
 St. Catherine University General  
 Education Fund  
 St. John the Evangelist Tuition Assistance  
 Fund, Little Canada  
 Saint John Vianney Seminary  
 Endowment Fund

St. Joseph Parish Endowment Fund,  
 West St. Paul  
 St. Joseph's Home for Children  
 Endowment Fund  
 St. Michael Religious Education Fund,  
 Stillwater  
 St. Paul Seminary Endowment  
 St. Peter Claver Tuition Aid Fund  
 St. Peter School Teachers Salary Fund,  
 North St. Paul  
 St. Rose of Lima Tuition Funds, Roseville  
 St. Thomas Aquinas Catholic School  
 Endowment Fund, International Falls  
 Star Family Religious Education Fund for  
 St. John Vianney Church, South St. Paul  
 Total Life Care Center Endowment Fund  
 Trinity Foundation Educational Endowment,  
 St. Louis Park  
 Corinne Van Heel Endowment Fund  
 Joseph and Angeline Waletzko  
 Scholarship Fund  
 Wegscheider Seminary Endowment  
 Robert and Mary Wesslund Fund for  
 St. Odilia, Shoreview  
 Otto C. Winzen Charitable Fund  
 Emil and Julia Wittman Memorial Fund  
 Reverend Richard Wolter Endowment



# Legacy Society Members

The Legacy Society honors individuals and families who have named the Catholic Community Foundation, or a fund managed by the Foundation, in their will or estate plan. We are deeply grateful for their dedication and charitable vision. The symbol † denotes those who have passed. We ask our community to keep all deceased members of the Legacy Society in its prayers.

William Altenhofen †  
Bernadette Amerongen  
Charles R. and Viola † Amundsen  
John and Elsie Andraschko  
Walter Andrychowicz †  
John and Kim Arens  
James A. Audette  
David and Rita Baden  
Severne M. Banack  
Donald and Margie Bartho  
William L. Belkengren  
Robert and Mary Belongie  
Karl A. Berndt  
Mary M. Bettenburg  
Richard and Carol Biniek  
Earl and Lorraine Blaylock †  
Dolores A. Blenkush †  
Warren H. † and Marilyn A. Blomquist  
Harold and Patricia J. Boerboom  
Daniel and Mary Jane Borrell  
Ellen Cull Bouslough  
Dr. R. Michael and Sharon Bowen  
Harold Brady  
Adeline M. and Milton Brecke †  
Jerome Brown †  
John and Betty Bruender  
Rev. John Brunner  
Frank J. Bruns Jr.  
Raymond S. † and Helen K. Brya  
Kay O'Brien Bunker †  
Leona L. Burke †  
Thomas L. Busch  
Vivian Byers †  
Rev. Albert Byrne †  
Frances H. Callaghan †  
Ruth E. and Francis Callaghan †  
William G. and Connie D. Carroll †  
Joseph E. and Fern Check †  
Donald and Oma Christle †  
Robert and Judith Claffin  
Alfred G. Colling  
Clement and Molly Commers  
Dr. Joseph P. † and Louise Connolly  
William and Marilyn Dejarlais  
Giovanna Dell'Orto  
Rev. Dennis K. Dempsey  
Dr. and Paul and Ann Dickinson  
Thomas and Betty Nell Dolan

James and Christine Doody  
Dr. George C. and Patricia † Dorsey  
Most Rev. Paul V. Dudley, DD †  
Thomas and Hannah Dzik  
Alfred and Mary Elder  
Donald and Marilou Eldred  
Thomas and Patricia Emmer  
Larry and Janet Enerson  
Theodore A. and Mary Estrem †  
Frank and Rosemarie Evangelist  
Raymond and Genevieve Feltl †  
Susanna Fleischhacker †  
Rev. Martin P. Fleming  
Richard H. and Margaret Fleming †  
Paula Flück  
Most Rev. Harry J. Flynn, DD  
James and Elizabeth Foley  
Lyle and Barbara Franke  
Joleen R. Franta  
Francis and Jean Franta  
Eugene and Mary Frey  
Thomas and Jan Nolan Gainor  
Rev. Msgr. Francis J. Garvey †  
Ronald and Brenda Gieneart  
Philip and JoAnn Gitter  
Rev. Robert P. Goblirsch  
Richard and Delphine † Goldstrand  
Edward and Barb Gorski  
Dr. Joseph and Clarice Gryskiewicz  
Robert † and June M. Gust  
Rev. Paul J. Hadusek †  
Edward S. † and Margaret Hagerly  
Raymond and Sally Haik  
Mary Ellen Halverson  
Hazel C. Heim †  
Quentin † and Sally Heimerman  
George and Katherine Henrich  
Julia F. Herl †  
Lawrence and Barbara Hessburg  
Rev. Msgr. Patrick J. Hessian †  
Eugene and Barbara Hickok  
Rev. Mr. Gary and Jacqueline Hoffman  
Marjorie Horst †  
Marjory Hougher †  
Rev. Leo Huber †  
Carolyn Huston  
Clarence and Bernice Hynes  
Shaun Irwin

Richard and Ruth Ann Jacobs  
Len and Bea Japs †  
Donald and Marian Jardine †  
Leo and Arlene Jarombek †  
Ray † and Cleorie Johnson  
Warren E. Johnson †  
Clarence and Clara Jorgensen  
Thomas and Shirley Jungels  
Mary F. Kading  
Charlotte M. Kangas †  
Barbara A. Keller  
Gerald and Charlotte Kelly  
Bernice Kelly †  
Clarence and Dorothy Kelzer  
Lorraine A. Kelzer  
Mary Kay Kennedy  
Laurence and Suzy Kennedy  
Robert and Margaret † Keppel  
Adella P. Kerber †  
Edwin Kerber †  
Ralph and Bette Keyes †  
Harry H. and Audrey Kirby †  
Rev. Francis R. Kittock  
James † and Mary Z. Klein  
John L. and Kathleen † Kokesch  
John L. † and Rajah Kolb  
Richard and Karen M. Kopy  
Joan C. Korkowski  
Dr. Stephen and Marla Kramer  
Vivian Kratz  
Norbert and Teresa Krenik  
Thomas and Janet Krocheski  
Rev. Alphonse M. Kubat †  
Kathryn Kubinski  
Eunice Kuehn  
Kathryne Kuhns  
Suzanne Laddusire  
Joseph and Teresa Lahti  
Stewart and Kathleen Laird  
Rock J. and Ivette LaManna  
Louis and Loretta Langer  
Phyllis A. Langfield  
James and Barbara A. Larkin †  
Robert and Florence Larkin †  
Peter and Mary Larsen  
Philip P. LaVelle †  
Maurice and Alice Leuthner  
James F. and Eleanor † Lyons



Daniel and Jean MacDonald  
 Daniel J. and Sheila † MacDonald  
 Daniel and Penny Malecha  
 Catherine Marien †  
 Barbara Martin  
 John A. and Dorothy † Matschi  
 Lawrence J. † and Barbara Matthews  
 Francis N. and Mary Louise Mayer †  
 Eugene Ebert and Marian McCarty Ebert  
 Darrel and Glenda McDonald  
 Rev. Kevin McDonough  
 Hugh McElroy  
 Rosemarie M. McGiffin  
 Jerome and Lisa McGivern  
 Jay McGivern  
 Timothy J. and Ann McGough  
 Lawrence and Andrea McGough  
 Michael and Janet McGough  
 Peter J. † and Mary McKenna  
 Michael McNamara and Mary Beth O'Reilly  
 Richard and Carol McNamara  
 John and Jane McNeill  
 Raul Andruet and Aida Mendez  
 Susan D. Meneely  
 Gerald and Kathleen Meyer  
 Eugene D. Misukanis  
 Luther J. and Gertrude E. Moen †  
 Kathryn Doyle Mooney †  
 Rodger † and Marjorie Mountain  
 Barbara Mulcahy  
 Harold and Bernice Mullen  
 James and Franchelle Mullin  
 Catherine Grace Murphy †  
 Timothy P. Nichols  
 Mickey K. Nickelson  
 Robert A. † and Helen Nicklaus  
 F. Gerald and Monica M. Nilles  
 Richard and Suzanne Opitz  
 Rev. William Paron  
 Wayne and Patricia Pelzel  
 Warren † and Rachel Pennig  
 Valeria Pezzani  
 Henry and Dorothy Piché †  
 Mildred J. Pike †  
 Ron Plante  
 Terrance Plante  
 Rev. Francis Pouliot

Robert and Dorothy Prax  
 Alexander † and Caroline Puzak  
 George † and Anne F. Raiche  
 Fred J. Ranallo †  
 Arnold and Deanna D. Rasmussen  
 Ronald Reimann and Diane Liemandt-Reimann  
 John J. and Eleanor Reusch †  
 Richard G. and Dorothy Revord †  
 Br. William Rhody, FSC †  
 Gerald and Diane Riebel  
 Most Rev. John R. Roach, DD †  
 Robert J. and Dorothy H. Roth  
 John and Carol Rueb  
 Rev. Patrick J. Ryan  
 Margaret Ryan †  
 Robert and Mary † Sahli  
 Robert F. and Kathleen M. Sather  
 M. Scott and Ellen Sayer  
 James and Mary Schacker  
 Roger and Irma Scherer  
 Bernadine E. Schmidt  
 Rev. George V. Schmit, Jr  
 Robert and Marianne Schoenecker  
 Marguerite Schoengart  
 William and Raneé Schouviller  
 Elizabeth Schreiner  
 Mary J. Schubert  
 Ed and Mary Schumacher  
 Kenneth and Jan Schwalbach  
 Kenneth W. Scully †  
 Thomas and Janice Segar  
 James and Lucia Seidel  
 David and Patricia Serrey  
 John L. Shrake †  
 Rev. Leonard F. Stiebenaler  
 Nicholas G. and Susan † Simons  
 Rev. Robert Sipe  
 Brien Slawik and Monika Strom  
 Harold and Sharon Slawik  
 Jerome and Delores Slawik  
 George A. Slipka  
 Ronald and Mary Smith  
 Stanley and Gladys † Sommers  
 Robert L. and Lucille Speeter †  
 Rev. Msgr. Stanley J. Srnec  
 John and Eleanor Steichen  
 Agnes Stensby

Florian J. Sterner  
 Mark and Lee Ann Sticha  
 William † & Anne Stocks  
 Gertrude C. Stoltz †  
 Clara Storms †  
 Robert and Anne Strachota  
 JoAnne Streich  
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 Carol A. Swanson  
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“OUR SOCIETY IS  
 ALL CAUGHT UP  
 IN THE HERE AND  
 NOW. UNLESS  
 YOU MAKE PEOPLE  
 AWARE OF THE  
 POSSIBILITIES, THEY  
 DON'T NECESSARILY  
 THINK ABOUT  
 WHAT'S AHEAD.”

— Cathy Guckeen  
 Parish Council Member  
 St. John the Baptist Parish,  
 Savage



# *focused* forward

## FOUNDATION COLLABORATES TO STRENGTHEN CATHOLIC SCHOOLS

Thanks to the foresight and generosity donors put toward endowments at the Foundation, providing financial support to Catholic schools has always been an integral part of our mission and work.

Now, the Foundation has stepped into a new leadership role intended to strengthen Catholic education in our community.

### **Why Catholic Education? Why Now?**

Catholic education has long been a backbone of our Catholic community and Catholic identity both locally and across the country. Yet, despite a long history of success, Catholic school enrollment has declined in recent years, and our Catholic schools are struggling financially. "It used to be that everyone in our neighborhood could afford to come to this school," said Lynn Volkenant, principal of St. Thomas More in St. Paul. "But now, there isn't enough tuition assistance to meet the need."

With rising costs and fewer families who can afford full tuition, many schools struggle. “Seventy percent of our students qualify for free and reduced lunch,” said Deb King, principal of Pope John Paul II, in Northeast Minneapolis. “Our biggest challenge is always dollars,” added Constance Krocak, former principal of Our Lady of the Lake Catholic School in Mound.

And yet, these same schools maintain their commitment to excellence, even in a neighborhood where well under half of students don’t complete high school. “We have children coming in at every grade level from systems where no one had expectations for them to be high achievers,” explained Dorwatha Woods, principal of Ascension Catholic School in North Minneapolis. “One of our strengths is bringing students who are academically struggling up to speed so that they’re ready for a rigorous high school. Sometimes it takes years.”

### **An Opportunity to Help**

The Catholic Community Foundation (CCF) is committed to being a part of efforts to turn the tide at our Catholic schools, equipping them to stabilize and thrive, and ultimately enabling our schools to continue to share Christ’s love and evangelize our faith to young people. That’s why, this year, the Foundation became a founding partner of the Catholic Schools Center of Excellence (CSCOE), which presents an innovative and collaborative opportunity to make a difference in our Catholic community.

CSCOE is a new organization whose mission is to help Catholic elementary schools achieve and maintain excellence while increasing student enrollment. While CSCOE is in its infancy as an

organization, its work is already reverberating across our Catholic elementary education system in many positive ways.

Each of the members of CSCOE — CCF, the GHR Foundation, the Aim Higher Foundation, and the Richard M. Schulze Family Foundation — believe that we can make a far greater impact on Catholic education by working together than we can separately. In addition to continuing financial support, the Foundation has committed to help develop innovative ideas, sound business practices, and effective strategies that guarantee the sustainability and success of every Catholic school in the Archdiocese.

### **Continuing a Tradition of Excellence**

As principals propel their students forward, they welcome the help. But there’s no pause in the effort to provide a rigorous, faith-based education to students.

Woods is proud to point out that 100 percent of Ascension students graduate from high school and 90 percent go on to college. “For many families, our children are the first to earn a college degree.”

“We’ll never turn anyone away,” states Deb King at John Paul II Catholic School, “but our budget is a roll of the dice. We’re always trying to figure out how we’re going to make it happen for our families.”

Now, Catholic school principals have a partner who’s helping to meet these challenges. The Catholic Community Foundation stands with them to ensure Catholic education remains strong and available for future generations.

THIS YEAR, THE  
FOUNDATION BECAME  
A FOUNDING PARTNER  
OF THE CATHOLIC  
SCHOOLS CENTER OF  
EXCELLENCE (CSCOE),  
WHICH PRESENTS  
AN INNOVATIVE  
AND COLLABORATIVE  
OPPORTUNITY TO MAKE  
A DIFFERENCE IN OUR  
CATHOLIC COMMUNITY.

*Learn more about CSCOE and its work at [www.cscoe-mn.org](http://www.cscoe-mn.org).*

# Legacy Fund

The Legacy Fund allows the Catholic Community Foundation to respond to emerging, unmet needs in our community. We are grateful for these donors who have committed gifts to The Legacy Fund and invite you to join them in strengthening our community together.

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“JESUS SAID, ‘LET THE CHILDREN COME TO ME, AND DO NOT PREVENT THEM; FOR THE KINGDOM OF HEAVEN BELONGS TO SUCH AS THESE.’”

— Matthew 19:14

# Donor Advised Funds

A Donor Advised Fund facilitates intentional charitable giving in an easy-to-use format that aligns with your faith. Donor Advised Funds can be used to plan giving annually and over a lifetime, pass on philanthropic values, and can provide a basis for your personal legacy endowment.

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# *focused* forward

## PARISH LEADERS LAY GROUNDWORK FOR FUTURE GENERATIONS

When the Parish of St. John the Baptist Catholic Church in Savage, Minn., managed to pay off a \$2 million building debt a few years early, parish leadership took the opportunity to shift their gaze to the future and lay the groundwork for coming generations. They went to work and established three endowments at the Catholic Community Foundation designed to support St. John's parish, school, and cemetery in perpetuity.

"We're a very middle income church," explained Joe Nardi, Chair of the Finance Council and a banker by profession. "We don't have the ability to easily generate a million dollars at the drop of a hat. Our current financial position comes from many, many years of people being supportive of the church but in small donations."

St. John the Baptist Catholic Church was chartered in 1854, making it one of the oldest parishes in the Archdiocese. "The parish started with 10 Irish families and now we have 2,200 households," said Fr. Michael Tix, pastor since 2004. "The school is over 50 years old and is a great source of pride for the community."

### **Taking the First Steps**

The idea for an endowment had been discussed for the last few years, but after retiring the debt, the council took the first step by inviting representatives



from the Catholic Community Foundation to a meeting to explain the process and answer questions.

Parish council member Cathy Guckeen described it as a real learning experience. "I wasn't familiar with endowment funds and what you can do. I just hadn't thought about it. But it really opened my eyes to the possibilities."

"The easy part was getting it set up," added Nardi. "What was more difficult was deciding what the funds should be used for."

In the end, the council decided to establish endowments that would cover the essential parish ministries. "The school is a huge part of our mission, so we created a fund that would help keep tuition low," explained Nardi. "The purpose for the parish fund is a little bit more general by design because we didn't want to box people in, but the intent is to provide funds for special situations, whatever that may be. And the third fund will provide perpetual care for the cemetery."

Trustee Craig Schoenecker believes the three endowments provide an important opportunity for parishioners who want to include the parish in their estate plans. "Many parishioners are looking to provide more substantial gifts," said Schoenecker. "This offers a way for them to contribute to the long-term support of the parish, and choose which ministries to support."



## Looking Beyond Next Year

Nardi says the council has worked hard over the years to make sure the parish is in good financial shape, but he keeps it in perspective. "The purpose of our parish is not about money; it's about the mission of Jesus," he points out. "But the reality is we need money to fulfill that mission. The endowments help us look beyond next year's budget and guarantee future generations at this parish."

Guckeen agrees, "Our society is all caught up in the here and now. Unless you make people aware of the possibilities, they don't necessarily think about what's ahead."

"I keep thinking of the 10 original Irish families back in 1854," said Fr. Michael. "When you look at how much we've grown, could they ever in their wildest imaginations have predicted what would

come from their efforts? Probably not, but those families set the cornerstone that's been built upon generation after generation for the glory of God."

Nardi sums up a shared belief. "We don't know what tomorrow will bring, but these endowments will support a strong foundation to continue the mission of our church."

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— Joe Nardi  
Finance Council Chair  
St. John the Baptist Parish,  
Savage

# Institutional Endowed Funds

An Institutional Endowed Fund is a permanent fund established by an organization to support and sustain its own ministries. When an institution invests in a permanently endowed fund at the Catholic Community Foundation, it makes a commitment to ensuring that its mission continues on for future generations.

Annual Catholic Appeal Endowment  
Assumption Cemetery Care Trust Fund, Richfield  
Goldie and Lorraine Buda Scholarship Fund for Saint Thomas Aquinas, St. Paul Park  
CommonBond Communities Housing Endowment Fund  
Emmet and Augusta Goff Endowment Fund for St. Stephen, Minneapolis  
Good Samaritan Fund for Church of the Holy Name, Wayzata  
Good Shepherd Endowment Fund, Golden Valley  
Guardian Angels School Endowment Fund, Chaska  
Guardian Angels – Arther Hoff Endowment, Oakdale  
Guardian Angels Capital Project Endowment, Oakdale  
Guardian Angels Cemetery Endowment, Oakdale  
Guild Endowment Fund  
M.T. Hill Trust for Christian Brothers  
M.T. Hill Trust for Cretin-Derham Hall  
M.T. Hill Trust for Invalid Priests  
Holy Name Endowment, Minneapolis  
Holy Trinity Operating Endowment, South St. Paul  
Immaculate Conception Fund, Lonsdale  
Immaculate Heart of Mary Faith Formation Endowment, Minnetonka  
Immaculate Heart of Mary Endowment for Scholarships, Minnetonka  
Immaculate Heart of Mary Endowment for Catholic Charities, Minnetonka  
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NET Ministries Endowment Fund  
NET Ministries Alumni Endowment Fund  
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Our Lady of Grace School Endowment Fund, Edina  
Our Lady of Grace – Fr. Cassidy Endowed Scholarship Fund, Edina  
Our Lady of Peace Parish Endowment Fund, Minneapolis  
Our Lady of Peace Education Endowment Fund, Minneapolis  
Our Lady of the Lake Endowment Fund, Mound  
Our Lady of the Lake School Endowment Fund, Mound  
Our Lady of the Lake Cemetery Fund, Mound  
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St. Patrick Building Endowment Fund, Inver Grove Heights

St. Paul's Monastery Endowment Fund  
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 St. Peter Tuition Assistance Endowment Fund, North St. Paul  
 St. Peter Parish Operating Endowment Fund, North St. Paul  
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 St. Mary Cemetery Fund, Olivia  
 Saint Mary's Perpetual Care Endowment, Arlington  
 St. Michael Cemetery Fund, Milroy



— Reverend Michael Tix  
 St. John the Baptist Parish, Savage

# Agency Funds

Catholic parishes, schools and institutions partner with the Catholic Community Foundation to manage charitable assets. Our portfolio balances the twin objectives of investing in a morally responsible manner while attempting to maximize total financial return over the long term, taking into account an appropriate amount of risk.

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– Lucille E. Kreutzian Endowment Fund  
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Center for Mission Fund  
Corpus Christi Fund, Roseville  
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Holy Childhood Fund, St. Paul  
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Holy Name of Jesus Funds, Wayzata  
Holy Name of Jesus Scholarship Fund, Wayzata  
Holy Rosary Capital Improvement Fund, Minneapolis  
Holy Spirit Funds  
Immaculate Heart of Mary – St. Luke School Funds  
Lawrence  
Leon and Mary Shrake Scholarship Fund for Saint Agnes  
Lumen Christi Long-Term Investment Funds  
Mary Queen of Peace Funds, Rogers  
Maternity of Mary/St. Andrew School Fund  
Most Holy Redeemer School Endowment  
Most Holy Trinity Fund, Veseli  
Nativity of Our Lord Endowment  
Nativity of the Blessed Virgin Mary Fund, Bloomington  
NET Ministries Funds  
Our Lady of Grace Funds, Edina  
Our Lady of Peace Funds, Minneapolis  
Our Lady of the Lake Funds, Mound  
Our Lady of Victory Long-Term Investment Fund, Minneapolis

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Sacred Heart Investment Fund, Robbinsdale  
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Saint Paul’s Outreach Fund  
Ss. Joachim and Anne Funds, Shakopee  
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St. Alphonsus Foundation Fund, Brooklyn Center  
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St. Charles/St. Michael Cemetery Fund  
St. Columba – Fr. Louis Morin Endowment  
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St. Elizabeth Ann Seton Funds, Hastings  
St. Frances Cabrini Fund – Sally Jernberg Memorial Fund, Minneapolis  
St. Francis – St. James School Funds  
St. Francis de Sales Funds  
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St. John the Baptist Fund, Vermillion  
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 St. Thomas More Catholic Community Fund  
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 St. Timothy Funds, Maple Lake  
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 The Basilica of Saint Mary  
 The Saint Paul Seminary Investment Funds

## Agency Funds in the Dioceses of Duluth and New Ulm

John Ireland Education Fund, St. Peter  
 Marquette School Endowment Fund, Virginia  
 St. Alice Long-Term Investment Fund, Pequot Lakes  
 St. Anastasia Fund, Hutchinson  
 St. Anne – Rev. Thomas Diehl Endowment Fund, Wabasso  
 St. Anthony Parish Funds, Watkins  
 St. Brendan Fund, Green Isle  
 St. John – Assumption Fund, Faxon Township  
 St. John Investment Funds, Hector  
 St. John the Evangelist Funds, Duluth  
 St. Joseph Fund, Henderson  
 St. Joseph Fund, Montevideo  
 St. Mary Cemetery Perpetual Care Fund, Sleepy Eye  
 St. Mary Fund, Arlington  
 St. Mary Scholarship Trust Fund, Sleepy Eye  
 St. Mary School Staff Endowment Fund, Sleepy Eye  
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