

“With an  
eye toward eternity,  
we can approach

# Legacy Planning

as a way for our  
earthly work to continue,  
even after we become  
sharers with the saints in

eternal life.”

– Bishop Patrick J. McGrath



**THE CATHOLIC**  
**COMMUNITY FOUNDATION**  
OF SANTA CLARA COUNTY

Dear Friends,

The mission of the Foundation is to grow Catholic philanthropy and build financial strength for ministry. This year, we've taken a big step forward with an anonymous \$1 Million Match for Parish Endowments. As we go to print, 20 parishes have made the match and 17 are working toward it.

We are also working with families to develop their legacy strategies, including planned gifts to parishes, schools, Catholic Charities, etc. Through these gifts, faithful members of our great Catholic community provide **FOREVER VALUE** for ministry, and remain forever a part of the programs they love.

Additionally, we are promoting “kitchen table philanthropy” - encouraging young families to establish Donor Advised Funds and use that as a central point for family giving decisions.

We hope you enjoy reading about the outcomes. Join us!



*Mary*  
**Mary Quilici Aumack**  
Executive Director

*Ron*  
**Ronald G. Pelzel**  
Board Chair

**A note from Mary:** At the end of this year, Ron Pelzel will leave our board. During his almost 10 years with us, he shepherded us through our strategic planning, and the launch of our vision to increase Catholic philanthropy. Throughout, he guided us with his famous principle: “Be easy to do business with.” We will miss his leadership, underpinned by his deep faith. We are blessed that he will remain our friend and emissary. Thank you Ron, for all!

## What's Inside:

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**11** parish endowments as of August 15, 2016

**37** parish endowments as of August 15, 2017

**41** gatherings at parishes & parishioners' homes hosted by the Foundation to discuss endowment and planned giving

**\$1,301**  
the average gift to an endowment

One pastor asked all his parishioners to consider donating **\$100 per family** until they reached \$20,000. As of 8/18/17, that parish received **72 donations** **88%** of which were contributions of \$100 or less!

**"I suppose I had better practice what I preach!"**  
a pastor's comment when donating the first \$1,000 to his parish's endowment

**12** pastors donated the initial gift to their parish's endowment

**18** pastors total contributed to their parish's endowment

The \$1 million anonymous gift inspired other generous donors to make their own anonymous matches. One donor offered

**four \$10,000 matches**

to parishes for whom raising \$20,000 was a real hardship. They are working to raise \$10,000 and receive both matches!

"We are so pleased that through a vibrant legacy program we can ensure that this diverse and joy-filled parish can flourish **FOREVER.**"  
— Anabella Estrada & Sally Samaniego, *Staff Members, Our Lady of Refuge Parish*

"Remembering the parish and its endowment in your estate is a wonderful final gesture, as well as a way for each parishioner to add their own lasting legacy to their parish." — Jim & Lisa Bourey, *Parishioners & Volunteers, St. Martin, Sunnyvale Parish*

"There is so much uncertainty in our lives and in our world. It comforts me to know that no matter how things change, the parish endowment will **FOREVER** support the members of this community." — Fr. Greg Kimm, *Pastor, St. Joseph of Cupertino*

**593**  
individual gifts

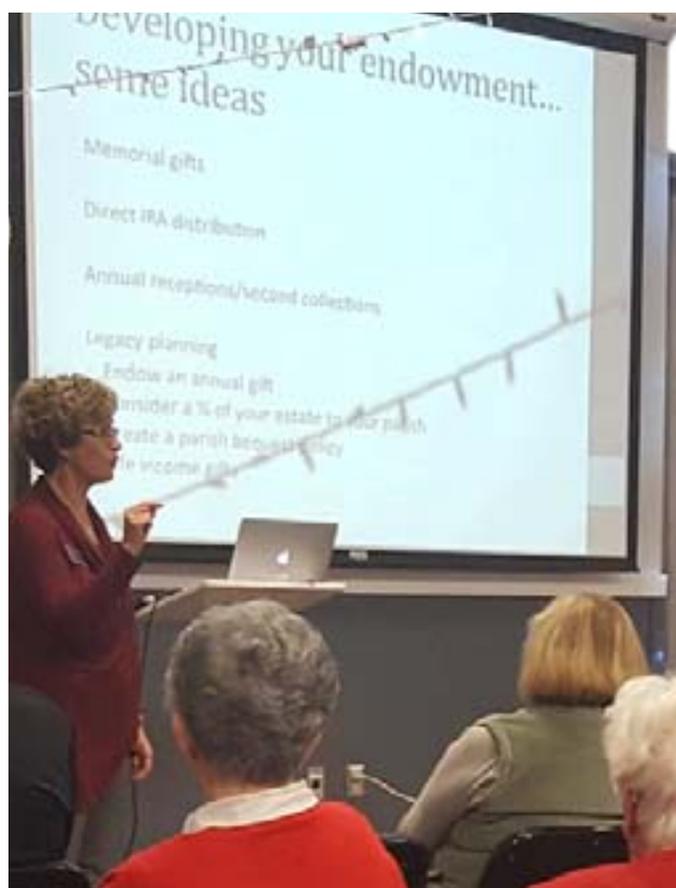
**464**  
individual donors

**\$1.2 Mil**

All numbers as of 8/18/17 raised for Parish Endowments (includes only \$400 of matching funds!)

## \$1 Million Parish Endowment Match

### Anonymous Match to Parish Endowments Inspires Philanthropy Throughout the Diocese



On August 30, 2016, the Catholic Community Foundation announced a \$1 Million Match for Parish Endowments. This equals a \$20,000 gift to each parish endowment that raises \$20,000 in new funds before September 30, 2017.

A \$40,000 endowment provides much needed assistance to a parish in the form of a roughly \$1,600 annual grant, but the true purpose of the match was to open the topics of endowment and planned giving – unfamiliar territory for many pastors and parishioners.

We have innumerable stories of parishioners who were inspired to make a lasting gift to their parish as part of their legacy. A gift to an endowment is a gift of hope – the donor's hope that future generations will continue to receive the gifts of the spirit from the parish community and the parish's hope that one day the fruits of the endowment can alleviate the strain of budgets so more time is spent on enriching ministries and less time is spent on fundraising.

Pictured: Parishioners gather to learn about their parish endowment. The Foundation hosted 41 gatherings at parishes to speak about endowment since September 2016.

# \$3,050,000

Granted 07/2016 - 06/2017

## Grants

# \$24,300,000

Total granted since inception

### Assets by Source

\$46,400,000  
Total Assets (06/30/17)

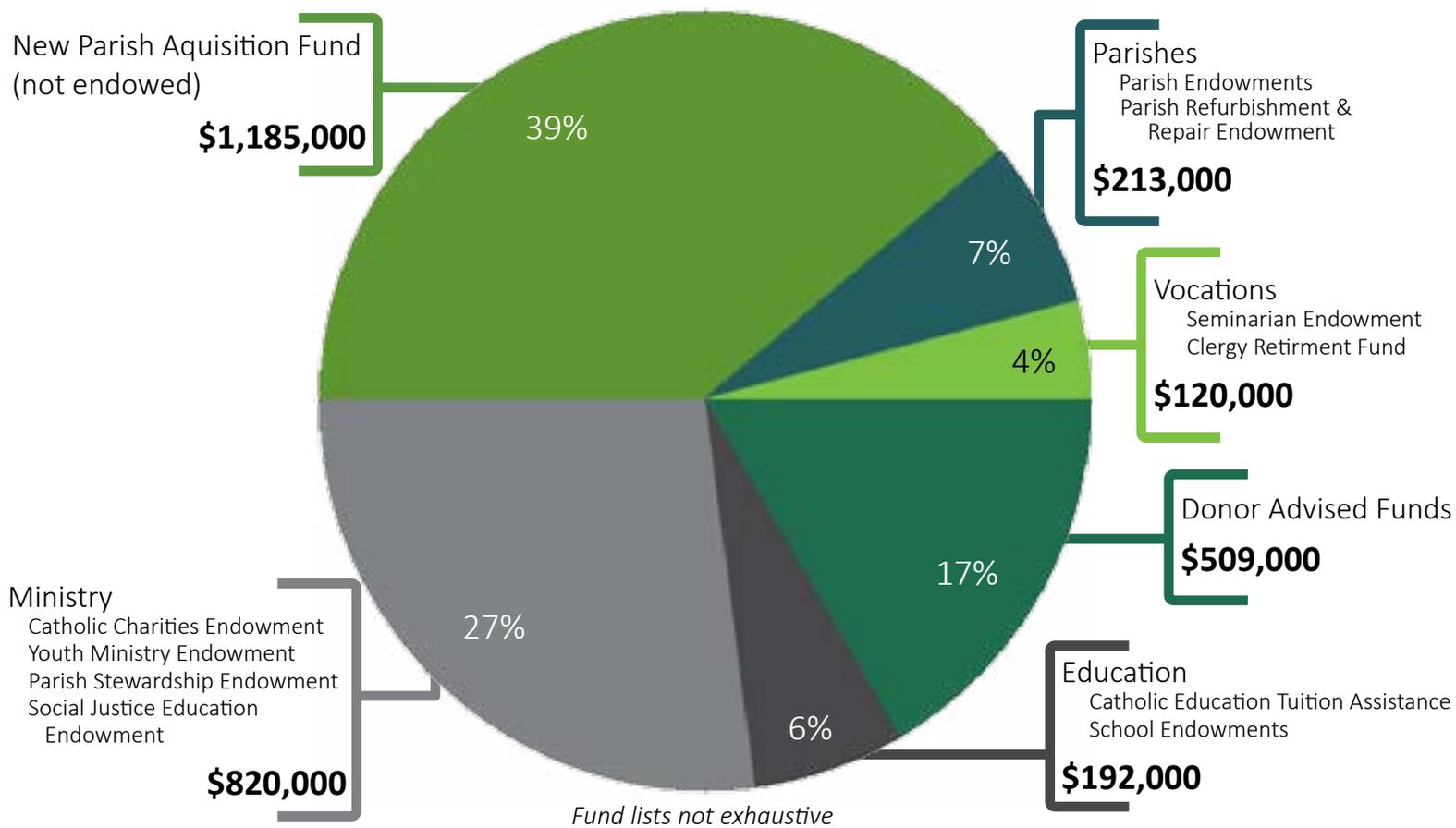
Donor Advised Funds 9%

Field of Interest Endowments 12%

Other Non-Endowed Funds 14%

Designated Endowments 66%

### Total Amount Granted July 2016 - June 2017



# 203

grants  
07/2016 - 06/2017

### Spring Grants by Fund

Apolonia Andre Fund for Liturgical Music

15 grants \$7,300

Parish Stewardship

31 grants \$56,300

Parish Outreach

21 grants \$100,000

Pastoral Ministry & Faith Formation

31 grants \$86,800

### Serving Communities on the Edge

It's no secret that living in the Silicon Valley is expensive. The cost of living in this region is so high that nearly 30% of local residents (about 800,000 people) "rely on some form of public or private assistance in order to get by."\* It's no surprise, then, that an overwhelming majority of applications for the Parish Outreach category in the Foundation's Spring Grant cycle are for rental assistance and food pantry programs. These programs are run by parish volunteers and serve the members of our community who are often overlooked – those living on the edge of homelessness.



Fresh produce distributed each month

For the past three years, Saint Clare Parish's Food Distribution and Rental Assistance Program received a grant from the Foundation. Every other Saturday, St. Vincent de Paul volunteers set up boxes of fresh produce and non-perishable goods, as well as rice, beans, and even, when it's available, frozen meat or fish. Mick Gonzales, a volunteer of over 20 years, noted that they made a big change in recent years to provide healthier, fresh options. For some of these families, this is some of the only fresh produce they have access to all month.



Volunteers setting up for food distribution

As the middle class continues to disappear in the Valley, more and more people are forced to search out programs like this one. The volunteers at Saint Clare have created a legacy of responding to the needs of their community and providing healthy options for people who don't always have a choice about what they feed their families.



Volunteers give up their mornings two Saturdays a month to set up and distribute boxes of food. A few boxes are delivered to homebound individuals.

\*Massaro, R. (2016, February). 2016 Silicon Valley Index, 28. Joint Venture Silicon Valley.

# Donor Advised Funds

**75%** of all Donor Advised grants are directed to local, Catholic organizations



Trent Normandin & Megan Milligan at the Tomb of the Unknown Soldier



## Kitchen Table Philanthropy

This spring, 8th graders from St. Mary of the Immaculate Conception School went on the much-loved trip to Washington, D.C. One of the highlights of this trip is laying a wreath at the Tomb of the Unknown Soldier. This year that honored tradition was carried out by Trent Normandin and Megan Milligan.

The Normandin & Milligan families have been friends for many years and have innumerable memories together. These families have many things in common, including a deep commitment to philanthropy. They are partnering with the Foundation to develop “kitchen table philanthropy” within their respective families through Donor Advised Funds.

Once a year, parents and children decide – as a family – the charitable organizations to which they will donate that year. By actively engaging their children in the family’s philanthropic decision-making, their children become more socially conscious and understand the positive impact their decisions can have on their community.

## Number of DAF Grants by Recipient Program Area

15%  
Education

25% Outreach

29% Parishes

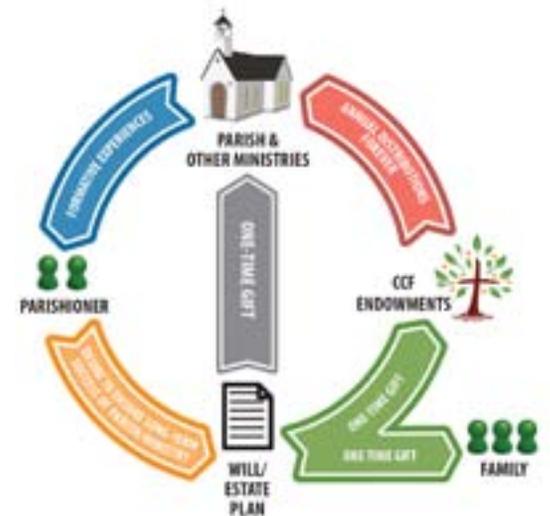
31% Ministry



## Planned Giving

### First Ever Planned Giving Seminar for the Diocese of San Jose

On Tuesday, May 23 the Foundation hosted a Planned Giving Seminar at St. Lucy Parish to teach parish and parish school leadership about legacy and planned gifts. The goal of the event was twofold: to inspire and equip. The first four speakers, including pastors and lay people, offered prayers, personal stories, and inspiration about endowment and planned giving. Bill Marsella, from The Catholic Community Foundation of Minnesota, inspired the 56 seminar attendees. The second half of the program taught basic concepts about planned giving. After the success of this event, a repeat of this program is being planned.



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