

The Catholic Foundation delivers the Spring Grant Cycle check to Pastor Fr. Joe Kim and Parish Administrator Luis Estrada at Saint John Vianney Parish.

Inside



- ▶ Donors' outpouring of generosity makes an impact in response to pandemic needs
- ▶ How the Foundation shifted in response to COVID-19
- ▶ Bequest to the Basilica provides **FOREVER VALUE**

RESPONDING IN A TIME OF CRISIS

► Our Mission

We are committed to strengthening our Catholic community through fund development and grantmaking. It is our vision to be a partner in Catholic philanthropy, matching donor intent with unmet needs, and building **FOREVER VALUE** by acquiring and growing endowed funds. Through prudent investing of endowments, administration of donor advised funds, and education around legacy giving, the Foundation builds long-term support for vital ministries and organizations in our local community and beyond.



Gather

We gather donations and develop funds for the benefit of the community



Grow

We grow the funds in our care through prudent and socially responsible investing



Give

We grant from the funds for the benefit of effective programs and organizations in our community and beyond

Celebrating mass at Saint Julie Billiard Parish in San Jose



Dear Friends,

At the Foundation we connect generous families with important need. Never have we seen the power of this connection more strongly than in this time of pandemic. The community needed us, and with our donors, we responded.

We have had record-setting grant making this year, both from endowments and Donor Advised Funds.

We were able to make a \$5,000 grant to every parish in the Diocese of San Jose and the chancery office for pandemic-related needs. And those grants were in addition to our Spring Grant Cycle in which we were able to meet 93% of the need thanks to support from generous donors.

This is why we encourage institutions to develop endowments and families to establish philanthropy funds – for important support in time of great need.

There are simple and important ways to join us, through endowments for institutions or areas of interest, Family Endowments and Donor Advised Funds. We also have great tools to assist in legacy planning.

When people ask about the changing face of Catholic philanthropy, we answer that it's not changing. This is who we've always been. We will continue supporting important causes today and creating **FOREVER VALUE** for the future of our community and beyond.

We hope you will enjoy the stories – and join us.



Jim Cashman
Board Chair,
The Catholic Community Foundation

Mary Quilici Aumack
CEO,
The Catholic Community Foundation

ASSETS UNDER MANAGEMENT



2019



61,000,000

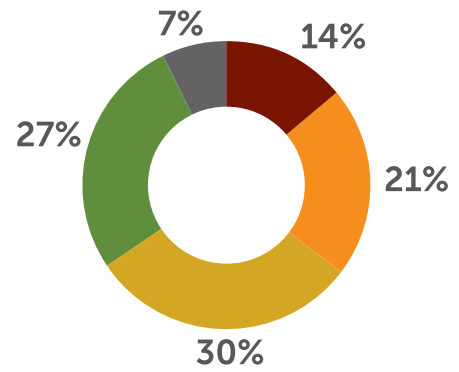


2020



84,000,000

Numbers as of September 30, 2020



| PURPOSE | TOTAL |
|---------------------------------------|--------------|
| Donor Advised Fund | \$12,000,000 |
| Education | \$18,000,000 |
| Ministry / Includes Family Endowments | \$25,000,000 |
| Parish | \$23,000,000 |
| Vocations | \$6,000,000 |

Generous Response to Extraordinary Need

When our county went into mandatory shelter-in-place on March 16 and we began to see the first local impacts of the coronavirus, we knew we needed to act. We reached out to our network of supporters and they immediately stepped up with enormous compassion and generosity. **Within a week, donors had responded with nearly \$30,000** in support of our local Catholic Charities, Diocesan schools, and local parishes. Donations continued to pour in over the following months. *Read more about our response to the coronavirus on page 8.*

“While some days the challenges of addressing the pandemic seem truly overwhelming, when we receive support like yours, it really lifts our spirits.”

Greg Kepferle, CEO of Catholic Charities of Santa Clara County



860,000
raised for COVID response



A gift of **FOREVER VALUE** for our beloved Cathedral Basilica

We often speak about **FOREVER VALUE**, this idea that through a donation or bequest to an endowment you can remain part of an institution and its ministries **FOREVER**.

They called themselves the “Roman Guards of the Cathedral.” This anonymous husband and wife – parishioners at the Cathedral Basilica of Saint Joseph for many decades – were historians and docents, with deep affection for this jewel of downtown San Jose.

During the Rooted in Faith Capital Campaign of the Diocese 15 years ago, one element was the upkeep and preservation of the Cathedral. As part of the campaign, this couple made a donation along with many others. The Cathedral had among the highest designated giving of all elements of the campaign. This generosity created an endowment at the Foundation that has granted over \$1 million since the first grant in 2009.

Projects supported by these grants have included painting the entire exterior, electrical upgrades, and restoring the stained-glass windows. In the years since their first donation, the “Roman Guards” continued to give annually.

Through the years, the couple had many conversations with the Foundation about their intent to include the Foundation in their estate plan, solely in support of the Cathedral Preservation Endowment. Now they are in heaven, and this beautiful gift from their estate establishes their legacy and keeps their love and spirit among us. Because of their generosity and important planning, the Foundation will make material annual grants in support of this historic and holy place **FOREVER**.

Each of us can provide **FOREVER VALUE** to a parish, school, religious order or ministry as part of our legacy. If you’d like to have a conversation about it, please contact us.

“The cathedral is more than just the building - it is the center of our diocese and truly a jewel for the city of San Jose. This cathedral shows the best of what we, as Catholics, can be for the greater community. It proves to be a beacon for those in need, both spiritually and physically.”
Joyce Denzel, Cathedral Docent



Our Funds

FIELD OF INTEREST ENDOWMENTS

Apolonia Andre Fund for Liturgical Music
Bishop Patrick J. McGrath Endowment for Ministry
Parish Outreach
Parish Repair & Refurbishment
Parish Stewardship
Pastoral Ministry Training & Formation

DESIGNATED ENDOWMENTS

Catholic Charities
Catholic Extension
Diaconate Training
Fund for Vocations and Religious Ministries
Lay Leadership
Loaves & Fishes
Martha's Kitchen
Saint Joseph the Builder (CCF Unrestricted)
Seminarian Training
Social Justice Education
Young Adult Ministry
Youth Ministry

PARISH DESIGNATED ENDOWMENTS

Ann Cretin Endowment for Service to St. Catherine Parish
Cathedral Basilica Operations
Cathedral Basilica Preservation
Catholic Community at Stanford
Church of the Transfiguration
Glover Endowment for St. Julie's Outreach & Immersion
Holy Family Parish
Holy Korean Martyrs Parish
Holy Spirit Parish
Most Holy Trinity Parish
Nachazel (Bill & Louise) Memorial Endowment for St. John the Baptist
Our Lady of Guadalupe Parish

Our Lady of Refuge Parish
Our Lady Star of the Sea Parish
Sacred Heart of Jesus Parish
Sacred Heart of Saratoga Parish
Saint Anthony Parish
Saint Christopher Parish
Saint Clare Parish
Saint Elizabeth Parish
Saint Frances Cabrini Parish
Saint Francis of Assisi Parish
Saint Joseph, Mountain View Parish
Saint Joseph of Cupertino Parish
Saint John Vianney Parish
Saint Julie Billiart Parish
Saint Julie Billiart Parish Next Generation
Saint Justin Parish
Saint Lawrence, the Martyr Parish
Saint Leo the Great Parish
Saint Lucy Parish
Saint Maria Goretti Parish
Saint Martin of Tours Parish
Saint Martin, Sunnyvale Parish
Saint Mary Parish (Gilroy)
Saint Mary of the Immaculate Conception Parish
Saint Nicholas & Saint William Catholic Parish
Saint Simon Parish
Saint Thomas Aquinas Parish
Saint Thomas of Canterbury Parish
San Jose Chinese Catholic Mission

"When I think of the word 'community,' I think of people who are not only connected in some way but who also support and care for one another. The Catholic Community Foundation lived up to its name by providing funds for our parish when we really needed them."

Fr. Greg Kimm, Pastor at Saint Joseph Cupertino Parish, on receiving their endowment disbursement early

▶ For descriptions of our funds and to donate, visit catholiccf.org/endowments



EDUCATION/SCHOOL DESIGNATED ENDOWMENTS

Catholic Education Tuition Assistance
George Santich Endowment to Benefit St. Justin School
Holy Spirit School
Notre Dame Education Fund
Sacred Heart Nativity Schools
Saint Christopher School
Saint Clare School
Saint Frances Cabrini School
Saint Lucy School
Saint Lucy School Scholarship Fund "Voices of Gratitude"
Saint Patrick School
Saint Simon Parish Endowment for Tuition Assistance

NON-ENDOWED FUNDS

New Parish Acquisition & Construction

DONOR ADVISED FUNDS

Anonymous Funds (17)
Ed and Kathy Almazol Charitable Fund
Anthony Gift Fund
Mary & Douglass Aumack Charitable Fund
Bakeis Family Charitable Fund
Baroni Family Charitable Giving Fund
Eric & Maria Bellafronto Charitable Fund
Thomas J. Biagini Charitable Fund
Ronald & Mary Ellen Cane Family Fund
Lucia F. Carrillo Charitable Fund
Stephen P. Carter Donor Advised Fund
Cashman Family Charitable Fund
Alice and Stan Chow Charitable Fund
Desbieys Family Fund
Rev. Hao Dinh Charitable Fund
Daniel E Furtado Donor Advised Fund

Galetto-Dugoni Charitable Fund
Genovese Family Charitable Fund
Hallagan Huston Family Fund
Rev. Saju Joseph Charitable Fund
Paul Keller and Aga Goodsell Charitable Fund
John & Carolyn Lewis Charitable Fund
Masleid Family Fund
Irene and Donald McGovern Charitable Fund
Milligan Family Fund
Mark & Bertha Minnihan Fund
George and Jill Montanari Charitable Fund
Mooney Family Fund
Nicholas G. and JoAnne Moore Family Fund
David and Alice Mount Family Fund
Lisa and Paul Normandin Charitable Fund
James R. O'Brien Charitable Fund
Andy & Trish O'Donnell Charitable Fund
Michael and Evelyn Oliver Charitable Fund
Patrick and Christine O'Malley Donor Fund
The Park Family Fund
Ronald G. and Sheryl A. Pelzel Fund
Richard C. Pfaff Fund
Bryan Polster and Anne Yamamoto Charitable Fund
Rev. Rick Rodoni Charitable Fund
John and Diann Ryan Charitable Fund
Sabadin Charitable Fund
Schall Family Charitable Fund
C. Schmidek Fund
John A. Sobrato & Susan Sobrato Fund
John M. Sobrato Fund
Stone Family Charitable Fund
TODKO Donor Advised Fund
Triplett Family Donor Advised Fund
Votaw Family Fund
Waite Family Charitable Fund
Lisa and Michael Yutrzeuka Make a Difference Fund

▶ For more information about Donor Advised Funds, visit catholiccf.org/donor-advised-funds



Our Investment Strategy

We are committed to designing a strategy that maximizes investment results. Our goal is to grow each fund's total return to provide a steady stream of income that fuels grants, supporting the mission of each beneficiary organization. We follow official guidelines for Catholic Investing and ensure our endowments are managed in compliance with endowment management laws.

"The Foundation is deeply committed to impact in our grant making and in our investing."

Brad Baron, Investment Committee Chair

OUR THREE MAIN OBJECTIVES



1 ▶ Focus on the long-term returns, providing **FOREVER VALUE** for our beneficiaries



2 ▶ Pool assets to capitalize on scale and gain access to top managers



3 ▶ Follow USCCB Guidelines for Catholic Investing to ensure we do not invest in companies that operate counter to our mission

NEW INVESTMENT PARTNER

Earlier this year the Foundation joined forces with **Jordan Park**, an investment advisory firm in San Francisco.

Jordan Park has the responsibility to implement the Investment Strategy set jointly with the Foundation. This partnership adds great value to our overall offerings. The team at Jordan Park is deeply experienced in investing all asset classes. Their commitment to impact investing and community improvement matches our commitment to Catholic investing and providing **FOREVER VALUE** through prudent and effective investment decisions.



▶ For more information about our investment strategy, visit catholiccf.org/investment-management



Response to the Coronavirus

When Santa Clara County went into mandatory quarantine on March 16, 2020, we knew we needed to act. No one yet knew the full extent of how the coronavirus would impact our community.

We knew that our beneficiaries, most of them parishes and Catholic elementary schools, would be in crisis mode and needed a compassionate and generous response from us.

Our nimble nature allowed us to make adjustments in both our Designated Grants and our Spring Grants so that organizations could get much needed “relief.”

“We are grateful to the Catholic Community Foundation and many donors for your support of our parishes and communities that help further the work of the Church here in the Valley of St. Clare. The work of our local Church, the Diocese of San Jose, can only be accomplished through such generosity and partnership.” Bishop Oscar Cantú



► DESIGNATED GRANTS

We manage many endowments for institutions and ministries which normally grant about 4% once a year in September.

This year, we knew these beneficiaries would need more support. **We were able to offer a one-time grant of 6% from these endowments in an accelerated timeframe.**

► SPRING GRANTS

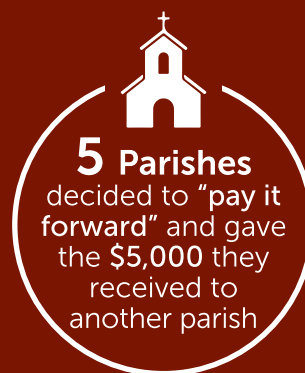
A lot happened between our original Spring Grant Cycle application deadline on March 16 and our ultimate granting. Once the realities of the pandemic began to set in, we knew our grantees would need support from our grant cycle more than ever before.

In the middle of this process, a donor pledged a **\$500,000 match for the Spring Grant Cycle**. This donation and the many matching gifts greatly amplified our ability to meet the community’s needs.

Thanks to the matching donation campaign, **the Foundation was able to give \$5,000 to every parish** in the Diocese of San Jose and the chancery office for pandemic-related needs – no application necessary. On top of that, parishes could apply for grants in our 7 application areas which now had significantly more funding. *Read more about the results of the Spring Grant Cycle on page 10.*



Fr. Saju Joseph, Pastor at Saint Martin of Tours Parish, and parish volunteers accept a check for the three grants they received in the Spring Grant Cycle.



Our Grantmaking

TOTAL GRANTMAKING



GRANTS BY PURPOSE Amount Granted Oct 19 - Sep 20



*Includes Family Endowment & Spring Grants

FIRST CATHOLIC IMPACT SCHOLAR AWARD WINNER

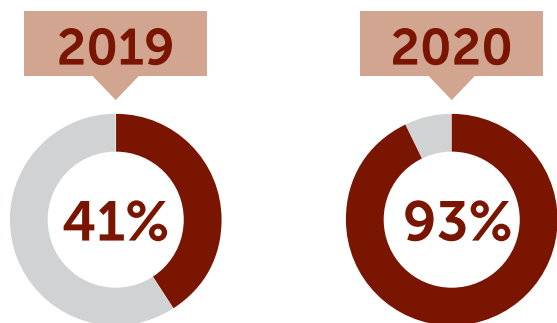
Ian da Silva of Bellarmine College Prep received the first **Catholic Impact Scholar Award**. The award is given to a junior who exemplifies the impact that a Catholic high school education has on a student’s future goals and view of the world around them. Each local Catholic high school was invited to nominate one junior student to write an essay answering the question, “How has my Catholic education prepared me to contribute to, engage with and improve my community and the world?” The winner received \$5,000 toward his senior year tuition.



Spring Grant Cycle

The Spring Grant Cycle is the Foundation’s annual open application cycle. Local parishes, Catholic elementary schools, and other pre-approved Catholic organizations can submit applications in seven categories.

% OF NEED MET IN



2020 SPRING GRANT CYCLE TOTALS

| CATEGORY | # GRANTS | \$ GRANTED |
|--|------------|------------------|
| Apolonia Andre Fund for Liturgical Music | 15 | \$30,000 |
| Clergy Leadership | 8 | \$22,500 |
| Family Life | 12 | \$45,000 |
| Lay & Religious Leadership | 8 | \$35,000 |
| Parish Outreach | 26 | \$187,000 |
| Parish Stewardship | 36 | \$186,500 |
| Pastoral Ministry Training and Formation | 44 | \$196,000 |
| GRAND TOTAL | 149 | \$702,000 |

TWO-YEAR GRANT

This year, the Foundation selected **“Neighbor-to-Nighbor Meals”** as the recipient of the **Two-Year Grant**. This grant secures two years of funding for a program under the Parish Outreach category. The program is a collaboration between Our Lady of Refuge, Christ the King, and Saint Maria Goretti parishes which are providing free, nutritious meals to the community at a weekly “Community Market.” Along with hot meals, community members can receive food boxes, medical care, immigration legal services, school supplies for children, and more.

Meals are provided to approximately 400 people at each parish per week. The market is run by parish volunteers, and Our Lady of Refuge Parish has already seen residents helped by the program come back as volunteers to serve others. Catholic Charities of Santa Clara County provides basic support and overall structure for this program as part of their Parish Engagement Program.

► To support more programs like this, donate to the Parish Outreach Endowment at catholiccf.org/parish-outreach



BISHOP MCGRATH ENDOWMENT FOR MINISTRY

The Bishop Patrick J. McGrath Endowment for Ministry was established to benefit the Diocese of San Jose as part of Bishop McGrath’s legacy. The endowment created three new categories for funding which issued their first grants during the 2020 Spring Grant Cycle: Clergy Leadership, Lay & Religious Leadership, and Family Life. Parishes and Diocesan offices applied to fund programs such as:

▶ **Saint John Vianney’s “Divine Renovation - Kickstart Cohorts”** program in which the pastor will go through a six-session training to move the parish “from maintenance to mission.”

▶ **Most Holy Trinity’s “Revitalize and Replant Parish Staff”** program which aims to revitalize staff in areas of teamwork, multi-tasking and leadership skills, especially in light of staff changes and challenges faced by the coronavirus.

▶ **Our Lady of La Vang’s “Year of Family Life”** program which offers workshops, retreats, and development sessions for parents and children to gain knowledge on how to grow in faith together and to strengthen the relationship of the family.

▶ To support more programs like this, donate to the Bishop McGrath Endowment for Ministry at catholiccf.org/bishop-mcgrath-endowment



Donor Advised Fund Granting

A Donor Advised Fund (DAF) is a convenient vehicle for donating to all the organizations you love. Donors make charitable contributions to their fund, receive the immediate tax deduction, and then recommend grants from the fund whenever it make sense for them. The Foundation offers opportunities for giving and education about local program throughout the year.

▶ For more information about how Donor Advised Funds work, visit catholiccf.org/donor-advised-funds



GENEROSITY THROUGH DONOR ADVISED FUNDS

Families can grow their Donor Advised Funds and utilize them by making grants in times of great need or opportunity. Sometimes they are viewed negatively as opportunities to “warehouse money.” Such is NOT the case with our generous donor advisors. From October 2019 through September 2020 we granted 24% from these funds, above the national average and well above the minimum granting requirements set for private foundations. Together we learn about needs and opportunities, and we respond.

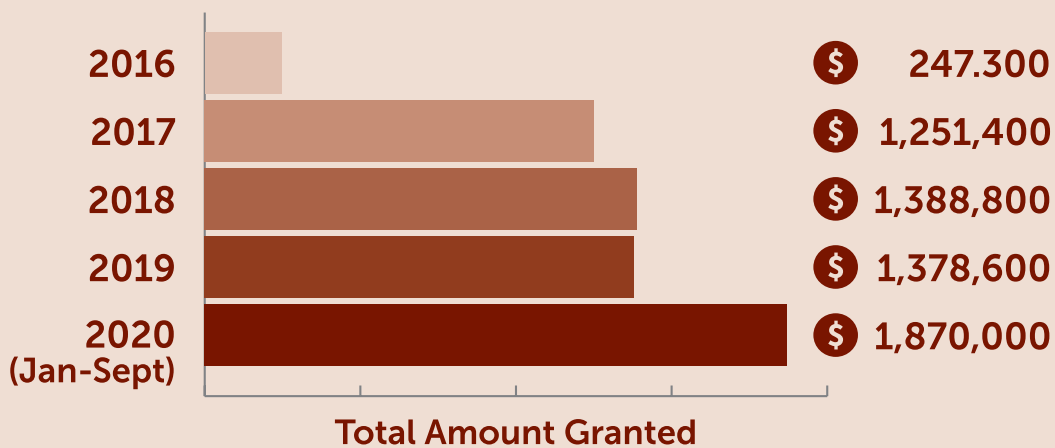


Donor Advised Fund Holders Respond in a Time of Crisis

At the Foundation, we are always in conversation with the families that have Donor Advised Funds with us. We can connect them to effective programs and important needs. When the pandemic hit and churches and schools were closed, we immediately went to these families and asked for help.

The beauty of this vehicle is that it allows for the building up of a “philanthropic nest egg,” ready to respond in times like these. And people DID respond. In fact, the last five years of granting tell the story of the generosity of our DAF holders during this pandemic.

DONOR ADVISED FUND GRANTING BY YEAR



FINISHING THE YEAR STRONG

DAF granting in only the first 3 quarters of 2020 has surpassed the total DAF granting of 2019. **Since, on average, 51% of our DAF grants are distributed in Q4, the total projected for 2020 looks very encouraging for our community.** Our DAF holders have been very generous during this time of need, and we know their generosity will continue into the end-of-year giving season.

“The Covid-19 pandemic affected so many lives. We were blessed to have the Catholic Community Foundation to work with, to help grant from our fund to our community in need.”

George and Jill Montanari, Donor Advised Fund Holders



\$
768,000
contributed by
DAF Holders toward
the Foundation's
COVID response

The Society of Saint Joseph

The **Society of Saint Joseph** is comprised of Catholic men and women who, understanding the call to protect and preserve our faith for future generations, have made a commitment to name their local parish, a Catholic elementary school, the Diocese of San Jose, or any ministry of the Diocese as beneficiary of a gift (of any size) in their wills or trusts, retirement accounts or life insurance policies.

We are grateful for these extraordinary gifts that come to the Church after the donors' lifetimes, bearing witness to the faith and ministries they supported and cherished during their life. Their legacy of support makes our Catholic institutions stronger, sustainable and better equipped to reach future generations with our message of faith, hope and love.



SOCIETY OF SAINT JOSEPH MEMBERS

| | | |
|------------------------------|------------------------------|--|
| Anonymous | George and Severa Escobar | William and Louise [†] Nachazel |
| Robert and Barbara Aquino | Daniel E. Furtado | Joe Naylor |
| Mary and Douglass Aumack | Rev. Thierry Geris | Louis and Margaret Normandin |
| Kenneth and Mary Baumel | Martha Giannini | Paul and Lisa Normandin |
| Thomas J. Biagini | Rick and Terry Giorgetti | Ronald and Sheryl Pelzel |
| Rev. Msgr. J. Patrick Browne | Aga Goodsell and Paul Keller | Robert and Carol Peters |
| Poi V. Buenaventura | Ron Hallagan and Ann Huston | Linda Poncetta |
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| Brendan J. and Isabel Cassin | John and Carolyn Lewis | Rev. Msgr. Terrence Sullivan |
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| Anthony Cirone | Leo and Carolyn Mauro | Rev. Leonard Traverso [†] |
| Richard and Lillian Clark | Most Rev. Patrick J. McGrath | Raymond and Susan Triplett |
| Rose Crimi | Rev. Brendan McGuire | Laurie Vavuris [†] |
| George P. Delucchi | Robert and Joan Mibach | Jess and Katrina Votaw |
| Joyce E. Denzel | Steve and Anne Miligan | Patrick and Ginny Waite |
| Jackson and Patricia Eaves | George and Jill Montanari | Nora and Daren Wilkinson |

Have you already named the Catholic Church in your estate plan?

Complete our confidential Legacy Intention Form and we will welcome you into the **Society of Saint Joseph!**

This Society is managed by the Catholic Community Foundation in partnership with the Office of Stewardship and Development at the Diocese of San Jose.



**DIOCESE OF
SAN JOSE**

► To learn more about the Society and what you can expect as a member, please visit catholiccf.org/society-of-saint-joseph



► Professional Advisors

The Foundation focuses on building strong relationships with Estate Planning Attorneys, CPAs, Wealth Managers, and other advisors throughout our community. When advisors know about the Foundation and our work, they can recommend our services to clients when they feel it is appropriate. We help educate professional advisors on creative ideas around philanthropy and legacy giving that might not be top-of-mind for them in their everyday work.

2020 CARES ACT WEBINAR

This year, in lieu of our normal spring Advisor Breakfast networking and speaker event, we presented a webinar about the philanthropic opportunities in the CARES Act. The Foundation was joined by Nancy Moriarty, Tax partner at Frank, Rimerman+Co., who spoke about the provisions of the legislation that impact philanthropy, and Erik Dryburgh, Principal at Adler & Colvin, who covered the opportunity that endowments present in light of this legislation. The recording of this webinar is available to view at <https://bit.ly/2G7KZLh>

"The Catholic Community Foundation provides a high-tech/high-touch approach when helping families execute their philanthropic strategies, both now and through effective legacy planning."

Charles Packer, Attorney and Shareholder, Hopkins & Carley



► For more information and resources for professional advisors, visit catholiccf.org/professional-advisors



2020 ADVISOR STEERING COMMITTEE

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Charles Volpe, *Berliner Cohen LLP*

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Jennifer Cunneen
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Don McGovern
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Bertha Minnihan

Paul Normandin
C.S. Park
John M. Sobrato
Raymond J. Triplett
Pat Waite

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Nick Carney, *Endowment & Planned Giving Program Manager*
Sean Finigan, *Operations Manager*
Marie Galetto-Dugoni, *Marketing Manager*
Maya Reyes, *Grants Program Manager*
Nora Wilkinson, *Administrative Coordinator*

► Parish Leader Advisor Group

Fr. Mark Arnzen, *Pastor, Saint Lucy Parish*
Fr. Joseph Benedict, *Pastor, Cathedral Basilica of Saint Joseph*
Fr. Chris Bennett, *Pastor, Saint Christopher Parish*
Fr. Saju Joseph, *Pastor, Saint Martin of Tours Parish*
Fr. Greg Kimm, *Pastor, Saint Joseph of Cupertino Parish*
Fr. Justin Le, *Pastor, Saint Maria Goretti Parish*

We recognize that parishes and the Diocese of San Jose are important partners in and beneficiaries of our work. The Foundation meets quarterly with the Parish Leader Advisor Group to brainstorm and discuss our work and partnership.



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