



Live streaming mass from
Saint Mary Parish in Gilroy

Inside



- ▶ Record grant making amidst the pandemic and economic uncertainty
- ▶ A new fund to support counseling and intervention services for Catholic elementary schoolchildren
- ▶ Parent Engagement Academy gives parents the tools they need to advocate for their children's futures

SILVER LININGS

Funding good work during difficult times

► Our Mission

We are committed to strengthening our Catholic community with a focus on fund development and **grant making**. We are a partner in philanthropy - matching donor intent with unmet needs, utilizing Donor Advised Funds, and assisting families in the development of **legacy plans**. Through the development and prudent investment of endowments, we provide **FOREVER VALUE** for vital organizations, programs, and ministries.



Gather

We gather donations from the community 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

Outdoor mass at Saint Maria Goretti Parish





Dear Friends,

Throughout the time of pandemic, the two of us have been meeting for appropriately distanced walking meetings. We speak of many things, but always come back to *"silver linings."*

When we speak of these positive outcomes, the most profound is the generosity that we witnessed and helped facilitate this past year. We had record grant making, granting \$5.5 million to many important and impacted organizations and programs, including \$2.5 million to the Diocese of San José.

Through the adoption of strong communication tools, we were able to reach MORE professional advisors than we had in previous years, including a session on philanthropy at Santa Clara University's Kasner Symposium for Estate Planning.

As a board and staff, we embraced the opportunity for deeper engagement as we look to the next five years and seek to grow grant making and impact.

The Foundation plays a unique and effective role in philanthropy through the development of funds which are strategically invested and effectively granted. We welcome the opportunity to be in conversation with families and to celebrate their generosity.

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

2020 GRANT MAKING HIGHLIGHTS



265,000

granted to parishes (\$5,000 each) for COVID-related needs – no application required



170,000

granted to parishes for sanitation equipment & technology upgrades through the Spring Grant Cycle (see page 10)



125,000

granted for parish operational support through Designated Endowments (see page 5)

ASSETS UNDER MANAGEMENT



2019

\$
81,500,000

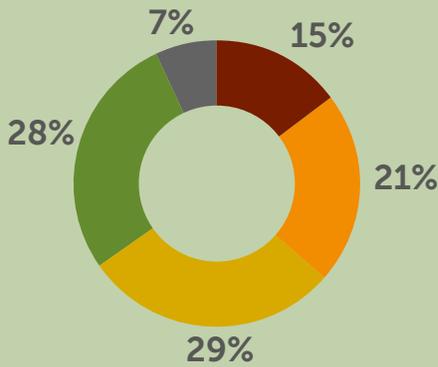
Assets ending Dec 31



2020

\$
95,000,000

ASSETS UNDER MANAGEMENT



1/1/2020 – 12/31/2020

PURPOSE	TOTAL IN MILLIONS
Donor Advised Fund	\$14
Education	\$21
Ministry / Includes Family Endowments	\$27.5
Parish	\$26.5
Vocations	\$6

Connecting Donors with Needs

We take pride in our ability to bring information about effective programs to the attention of interested donors. Throughout the pandemic, we did just that. Through mass communications and individual conversations, we informed donors of

the struggles facing parishes, schools and other organizations in our local community. And, as we knew they would, donors responded with astonishing generosity.



900,000

Amount raised in 2020 which directly supported immediate community needs





The Right Time for a Gift in Support of Catholic Schools

During a year of significant loss and turmoil, we also witnessed immense generosity. Many people are philanthropic and simply waiting for the right opportunity to give. Such was the case for one donor who is passionate about Catholic education. While already a generous donor, the unique circumstances of the pandemic and the CARES Act legislation in 2020 provided the perfect opportunity to create a highly impactful fund.

This donor had a vision to enhance the Catholic school experience for low-income students and students in underserved communities by providing services beyond those typically covered by tuition costs. The Foundation worked with the donor and the Diocese of San Jose Department of Catholic Schools to refine this vision into something that would have real and measurable impact. After analyzing options, it was decided that a fund set up to support counseling and intervention services for students and families would fill an existing need and help these students achieve positive outcomes.

This new fund, entitled the ***Pillar of Hope Fund for Student Counseling and Intervention Services***, will grant \$200,000 a year for the next three years to fund a pilot program at three different schools.

The Foundation's knowledge of the CARES Act's philanthropy provisions helped the donor see why now was the perfect time to start this fund. Under the CARES Act, itemizers are allowed to deduct up to 100% of their Adjusted Gross Income instead of the normal 50%. This is a great opportunity for families that are in a position to increase their giving now and take advantage of the tax benefits.

In addition to our knowledge of the CARES Act, the Foundation also added value in shaping the fund and its parameters. The Foundation already had systems and policies in place to govern, steward, and manage this fund. Based on our experience with similar funds, we were able to help the Department of Catholic Schools and the donor shape an appropriate definition, granting process and reporting requirements for the fund.

Ultimately, it's the collaboration among the three parties that created this fund and which will continue to bring success to this program for years to come.

▶ The special tax provisions of the CARES Act carried over into 2021. If you are interested in starting a fund for a cause or organization you love, contact us to begin a conversation at **408.995.5219** or **info@catholiccf.org**



"Counseling services are so important for our school children, especially now in the midst of this pandemic. I am really pleased with how the partnership between the Foundation and the Department of Catholic Schools has made this fund stronger."
Mary Quilici Aumack, CEO, The Catholic Community Foundation

Our Endowments

FIELD OF INTEREST ENDOWMENTS

Apolonia Andre Fund for Liturgical Music
Bishop Patrick J. McGrath Endowment for Ministry
Clergy Leadership
Family Life
Lay and Religious Leadership
Fogelquist Fund for Education
Parish Outreach
Parish Repair & Refurbishment
Parish Stewardship
Pastoral Ministry Training & Formation

DESIGNATED ENDOWMENTS

Catholic Charities
Catholic Community Foundation Unrestricted
Granting Endowment
Catholic Extension
Diaconate Training
Fund for Vocations and Religious Ministries
Institute for Leadership in Ministry
Loaves & Fishes
Martha's Kitchen
Seminarian
Social Justice Education
Young Adult Ministry
Youth Ministry

EDUCATION/SCHOOL DESIGNATED ENDOWMENTS

Catholic Education Tuition Assistance
Cristo Rey San José Jesuit High School
George Santich Endowment to Benefit St. Justin
School
Holy Spirit School
Jane Daigle Endowment for Saint Frances Cabrini
School
Notre Dame San Jose Education
Sacred Heart Nativity Schools
Saint Christopher School
Saint Clare School

Saint Lucy School
Saint Lucy Parish School Scholarship Fund
"Voices of Gratitude"
Saint Patrick School
Saint Simon Parish Endowment for Tuition
Assistance

NON-ENDOWED FUNDS

Catholic Impact Scholar
Spring Grant Supplemental
New Parish Acquisition & Construction
Pillar of Hope Fund for Student Counseling and
Intervention Services

PARISH DESIGNATED ENDOWMENTS

Ann Cretin Endowment for Service to Saint
Catherine Parish
Cathedral Basilica Parish Operations
Cathedral Basilica Preservation
Catholic Community at Stanford
Church of the Transfiguration
Holy Family Parish
Holy Korean Martyrs Catholic Church
Holy Spirit Parish
Most Holy Trinity Parish
Nachazel (Bill & Louise) Memorial Endowment
for St. John the Baptist Parish
Our Lady of Guadalupe Parish
Our Lady of Refuge Parish
Our Lady Star of the Sea Parish
Queen of Apostles Parish
Sacred Heart of Jesus Parish
Sacred Heart 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 Endowment for Divine
Mercy & Special Needs Outreach
Saint Julie Billiart Parish Next Generation

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





Glover Endowment for Saint Julie's Outreach
& Immersion
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 Parish
Saint Simon Parish
Saint Thomas Aquinas Parish
Saint Thomas of Canterbury Parish
San Jose Chinese Catholic Mission

Milligan Family Donor Advised 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
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
Celine and Curt 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 Yutzenka Make a Difference Fund

Donor Advised Funds

Anonymous Funds (18)
Ed and Kathy Almazol Charitable Fund
Anthony Gift Fund
Mary & Douglass Aumack Charitable Fund
Richard Baer and Bella Babot Fund
Bakeis Family Charitable Fund
Baroni Family Charitable Giving Fund
Eric & Maria Bellafronto Charitable Fund
Thomas J. Biagini Charitable Fund
Burgundy 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
Galletto-Dugoni Charitable Fund
Genovese Family Charitable Fund
Gilbert Family Charitable Fund
Hallagan Huston Family Fund
Rev. Saju Joseph Charitable Fund
Paul Keller and Aga Goodsell Charitable Fund
Kuechler-Montes de Oca Family Fund
John & Carolyn Lewis Charitable Fund
Masleid Family Fund
Irene and Donald McGovern Charitable Fund

► DEFINITIONS

FIELD OF INTEREST ENDOWMENT –

Generates grants for programs based on a purpose; potential grantees submit applications every year for considerations.

DESIGNATED ENDOWMENT – Generates a grant for the same organization and purpose every year; no application is required.

DONOR ADVISED FUND – A donor contributes to his/her fund and then may advise when and to whom grants are distributed; this fund may be fully spent.

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



Leaving a Legacy for her Favorite Priest

In our communities of faith, we develop strong relationships, bonding with others in our shared friendship with Jesus. Such is the bond between Father Saju Joseph and many of his parishioners. We witnessed these connections firsthand when the Foundation opened a Donor Advised Fund in honor of Fr. Saju's 25th anniversary of ordination. In celebration of his ministry, 54 families donated to this fund. Now Fr. Saju can use this money to grant to ministries and organizations close to his heart.

We recently learned that one dear friend celebrated the ministry of Fr. Saju by leaving a bequest for his fund. Rita Russo met Fr. Saju 16 years ago when he was parochial vicar at Saint Julie Billiart Parish. They started working closely on the San Jose English Cursillo Movement which is a lay movement with the goal to "Be a friend, make a friend and bring a friend to Christ." And become friends they certainly did!

Their relationship grew from working together on leadership formation to enjoying meals together and even taking a trip to visit friends in Hawaii. Rita was a great teacher and had a passion for farm workers and their causes. She was a Notre Dame Sister for 27 years, and even after that time she lived a simple life with Saint Julie as her inspiration.

Rita had a way of making others feel special and she inspired the people who were lucky enough to know her in life. She continues to inspire after her lifetime with her generosity. As part of her legacy, she left all of her assets to charity. Fr. Saju's Donor Advised Fund was one of four recipients of her generosity. Through this beautiful legacy gift, her memory will live on through Fr. Saju's philanthropy. This is truly **FOREVER VALUE.**

"She considered me her son and she became a mother to me. We had frequent meals and great conversations together. Although not married and having no siblings, she ended up with a large extended family of parishioners, friends, children and Cursillistas who admired her. She lived a life that inspired all of us."

Fr. Saju Joseph





OUR THREE MAIN INVESTMENT 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 ▶



Participate in responsible investing, which includes both Catholic screens and impact investing

OUR INVESTMENT ADVISOR

Jordan Park's team of experienced, empathetic and results-oriented managers provides data-driven investment and financial advice for all the Foundation's funds. Jordan Park's mission to enhance lives and legacies aligns with the Foundation, working to create **FOREVER VALUE** for our local Catholic community and to serve community needs.



Investing in our Catholic Values

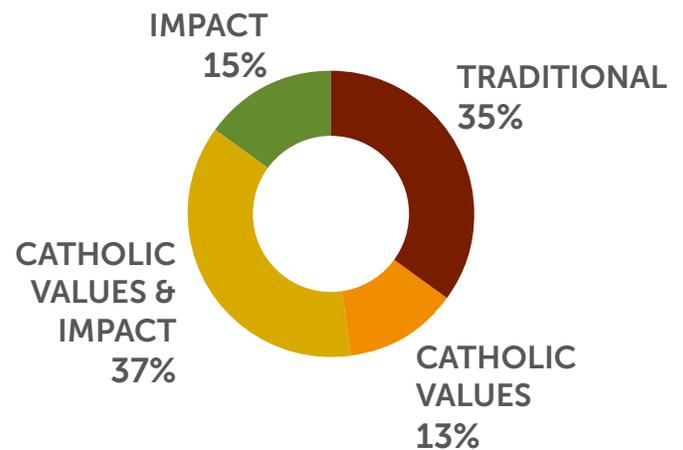
We have always invested through the lens of Catholic Social Teaching, and that historically meant screening out companies who were not socially responsible. Jordan Park introduced us to a framework of impact investing on a spectrum. We are now committed to taking the next steps into not just avoiding negative outcomes but investing for positive outcomes with **ESG and Impact Investing**.

▶ DEFINITIONS

IMPACT INVESTING – An investment strategy that aims to generate specific beneficial social or environmental effects in addition to financial gains.

ESG – Environmental, social, and governance (ESG) criteria; these are a set of standards investors use to evaluate a company's operations.

ENDOWMENT PORTFOLIO LONG-TERM TARGET

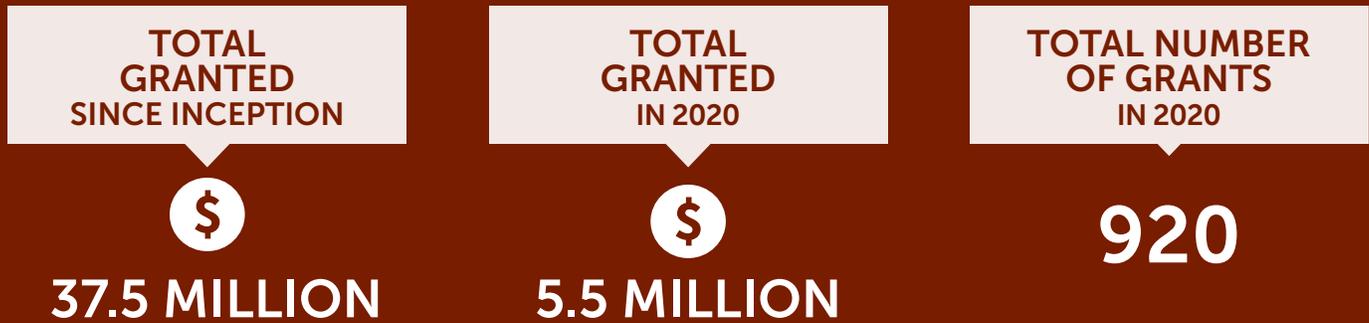


▶ For more information about our investment strategy, visit catholiccf.org/investment-management



Our Grantmaking

TOTAL GRANTMAKING



GRANTS BY PURPOSE



*Includes Family Endowment & Spring Grants

CATHOLIC IMPACT SCHOLAR AWARD WINNER

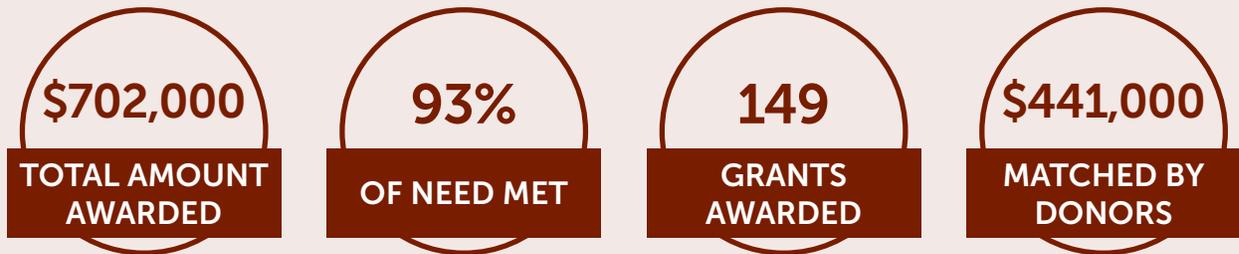
This year's Catholic Impact Scholar Award winner is **Claire Nguyen**, currently a junior at Notre Dame High School. Her essay and letter of recommendation showed a young woman who embodies the award's themes of Catholic values and community impact. Her passion for musicianship, song writing and community service has deepened her faith. Over the first five months of quarantine, she and her family were able to make over 3,700 fabric masks for first responders and community volunteers.

Nguyen will receive \$5,000 toward her senior year tuition. A new addition this year, each of the other nominees will receive \$1,000 toward their senior year tuition. The runners up are juniors at Archbishop Mitty High School, Bellarmine College Preparatory, Cristo Rey San José Jesuit High School, and Presentation High School.





Spring Grant Cycle



Technology Upgrades Increase Parish's World-Wide Reach

A cell phone, a make-shift tripod, and a laptop were the extent of the technology available to **Five Wounds Portuguese National Parish** for livestreaming masses at the beginning of the pandemic. While relatively low-tech, the parish still averaged about 2,000 viewers for their Sunday masses. Thanks in part to a grant from the Foundation's Spring Grant Cycle, the parish is now using state-of-the-art technology to reach an average of 5,000 to 6,000 viewers every Sunday. Thanks to the strength of endowments and the generosity of donors, parishes like Five Wounds received grants which allowed them to continue connecting with their parishioners even while physically distant.



United States, Canada, Portugal, Brazil, Japan, France, Nigeria, India, Bangladesh

Countries where people tune in to view Fr. António's English & Portuguese masses.



80,000

Amount the Foundation granted to parishes for upgrading livestreaming and outdoor mass equipment in 2020.

► Read more about Five Wounds Parish's livestreaming journey at <https://bit.ly/3utPMuA>



The parish started livestreaming on Instagram by duct taping a car phone holder to a table.



Now the parish uses a state-of-the-art three-camera video broadcasting system thanks to donations from two families and a grant from the Foundation.

Parent Engagement Academy

In 2019, the Foundation awarded the **Cathedral Basilica of Saint Joseph, Saint Leo the Great Parish and Sacred Heart of Jesus Parish** a Two-Year Grant for a Parent Engagement Academy. They invited families from the parishes and parish schools to participate in the workshop run by the Parent Institute for Quality Education (PIQE). The parishes also partnered with the Hispanic Foundation of Silicon Valley. During the 8-week workshop in Spanish, parents learned how to:

- ▶ Fully engage in and navigate the educational system
- ▶ Serve as an advocate for their children's education

Despite the challenges presented by the coronavirus pandemic, the program saw an increase in engagement during the second year of the program which was entirely online.

"I heard personally from two families how they were approaching education and parenting differently - and how pleased they were to have the tools they never knew they needed,"

Fr. Joseph Benedict, Pastor of the Cathedral Basilica Parish

▶ To support more programs like this, donate to the catholiccf.org/spring-match



One parent even noted that her son would listen to the class and encourage her to participate and give her opinion. With enough funding, the parishes and PIQE would like to continue providing parents with the support and resources they need to ensure that their children have bright and successful futures.

31
parents
graduated



47
parents
graduated

from the program's first year

from the program's entirely virtual second year

"[T]he program is an excellent step-by-step information path of how to find more help and be able to get to the right place where the needed tools are. My advice for parents after attending these classes is that we must take advantage of what the program provides and try to practice what is learned in each class."

Merse Bonilla, PIQE Graduate



Virtual graduation for the second year of the PIQE program





Donor Advised Fund Granting

DONOR ADVISED FUND GRANT TOTALS BY YEAR



Total Amount Granted

"When we were looking to expand our charitable giving, a Donor Advised Fund appealed to us because of the convenience of giving and the opportunities for grant-making that matched our philanthropic interests. We have also learned about deserving causes and programs through the helpful communications from the Foundation."



Curt and Celine Schmidek

Evolution of a Catholic Philanthropist

Because we facilitate philanthropy, our office is always busy in the last few weeks of the year. We often get requests to open Donor Advised Funds after Christmas. Such was the case in 2017 when we received a call asking if we had a fax machine...Did we still have a fax machine? Turns out we did. That fax started a new Donor Advised Fund for a family we had never met before. The following year, one of them retired. Although they were already active in their parish and other ministries, we reached out to see if they would be interested in learning about effective ministries and programs in our community. We met for coffee to discuss their areas of interest and passion. Since that first coffee meeting, we have established a beautiful, mutually beneficial

friendship. We check in with each other frequently. Ideas have blossomed into fruitful endeavors, benefitting programs throughout the community for both immediate and long-term needs.

We are grateful to be a connector between generous families and effective programs. This is our main goal – to help the arc of Catholic Philanthropy become larger and more effective, bringing community improvement and joy. This is **FOREVER VALUE.**

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



▶ We are grateful

The Society of Saint Joseph

The Society of Saint Joseph is comprised of Catholic men and women who 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 estate plans. The Society is managed in partnership with the Diocese of San Jose.



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! Please visit catholiccf.org/SocietyofSaintJoseph



The annual mass with Bishop Oscar Cantú to celebrate members of the Society of Saint Joseph was a virtual event in 2020 because of COVID-19 restrictions. Members joined the celebration from home and also received a commemorative statue of Saint Joseph.

SOCIETY OF SAINT JOSEPH MEMBERS

- | | | |
|------------------------------|---------------------------------|------------------------------|
| Anonymous | Mary Ellen P. Genovese | Louis and Margaret Normandin |
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| George and Severa Escobar | William and Louise† Nachazel | Nora and Daren Wilkinson |
| Daniel E. Furtado | Joe Naylor | |

† deceased



► Professional Advisors

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 Charles Volpe, *Berliner Cohen LLP*

The Foundation focuses on building strong relationships with Estate Planning Attorneys, CPAs, Wealth Managers, and other advisors in our community. We offer creative ideas and solutions for philanthropy and legacy planning that professional advisors can utilize and recommend to their clients when they feel it's appropriate.

"As clients become more focused on building creative and custom giving strategies, the role of a philanthropic partner is increasingly important. The expertise of the Catholic Community Foundation has been an excellent resource for me and brought great value to clients as they plan and execute effective philanthropy."



Bryan Polster, Past Chairman, Frank, Rimerman + Co., LLP

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





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@TheCatholicCommunityFoundation



The Catholic Community Foundation

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▶ Parish Leader Advisor Group

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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*

▶ See photos and bios of all Board
Members at catholiccf.org/board



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.