

## ANNUAL REPORT

# 2021



### Inside this Edition

- ▶ Why Wait? The story of a family investing in long-term charitable impact
- ▶ What is it like to have a Donor Advised Fund at the Foundation?
- ▶ See what professional advisors say about working with us

# FAMILIES MAKING AN IMPACT

## ▶ Who is the Catholic Community Foundation?

We are



Grant makers



Fund developers



Connectors of  
generous people and  
impactful programs

The Catholic Community Foundation is a collection of funds which are prudently invested to benefit Catholic ministries and other important charities. We build **FOREVER VALUE** through institutional funds, family funds and legacy planning.

## Families Making an Impact Through the Foundation

Throughout this report, you will find stories of individuals and families who have chosen to make a positive impact on our Catholic community through the Foundation. Impact is a topic that we frequently discuss with donors. Some donors have thought deeply about long-term impact before they donate. For some, conversations with us are the first time they have thought about the topic.

All donors make an impact, no matter the size of their gift. At the Foundation, we see every day how “small” gifts grow to have large, long-term impact. Our goal is to grow effective Catholic philanthropy. We aim to inspire donors to support the organizations and ministries they love. However, more often than not, the generosity of our community ends up inspiring **us**. Please read on – We know their stories will inspire you too!



A post-confirmation class hosted by Our Lady of Peace Parish helps young people deepen their faith and awaken a desire for authentic beauty through literature, art, music, and experiencing nature. The Foundation supported this program with a grant from the Pastoral Ministry Training and Formation category of the Spring Grant Cycle.

## Dear Friends,

We certainly hoped that we would not be in masks two years in a row for this publication! On the bright side, as we write this the pandemic numbers are on the wane (hopefully to stay), and there is a bustle in the valley that is hope-filled.

The vast generosity that we witnessed and facilitated in 2020 continued into 2021. We had another record year for grant making – the heart of the Foundation. Each grant carries a story, some of which we hope you will enjoy reading about in this report.

We have often said that our main role is to act as a connector between generous individuals and families and important ministries and works. This year we expanded that connection and reach through cultivation of funds that reflect a family’s values, provide lasting support for organizations that inspire, and create legacies.

When developing funds for individuals and families we often partner with a trusted advisor. This could be a tax or estates attorney, CPA, wealth manager or insurance professional. We work to educate the advisor community on the capabilities of the Foundation so that, when appropriate, their clients may invite us into conversation. In this report, we have interesting perspectives from three such professionals.

We have taken steps to strengthen the link between our Catholic social values and the way that we invest funds, moving further into true impact investing.

We are grateful to hold charitable equity for individuals and families, to develop funds that provide permanent support for ministries and organizations that have helped form families, and to walk with donors in developing and implementing important philanthropic strategies.

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

# ► Family Endowments

## What is a Family Endowment?

A Family Endowment is a perpetual fund established to create a lasting legacy for a family. Endowments grow and grant **FOREVER**, so the organizations you select will receive support for generations to come.

## Why Wait? A Story of Investing in Long-Term Impact

Stewardship is about recognizing that all the gifts we receive are gifts from God. Steve and Elisa Baroni strive to be good stewards of the gifts they have received by giving generously back to their community.

For nearly 20 years, the Baronis have supported Catholic Charities of Santa Clara County because they have seen how impactful the programs are in the local community. Assisting those who are housing-insecure has become a focal point for their philanthropy in recent years. "We're both native to San Jose," notes Elisa. "We've seen the cost-of-living increase and how difficult it has become to reside in San Jose. Seeing my fellow teachers try to afford housing, family members who can't afford to stay here ...many of them are struggling to keep a roof over their heads."

They wanted to make a more permanent gift for Catholic Charities, but they thought it would have to wait until later – perhaps once they retired. However, when they learned about the Foundation's Family Endowments, they started to realize they could create a permanent gift now. They thought, "Why wait?"

So, at the end of 2021, Steve and Elisa started the *Stephen and Elisa Baroni Family Endowment*. The endowment will generate a grant every year for Catholic Charities' rental assistance program.

"I think about [our philanthropy] like investing," says Steve. "We have our current philanthropy – dollars going out right away for immediate impact. But as we looked at our long-term strategy, we didn't want to wait. We wanted to start making some investments now and start looking for areas of need where we could have permanent impact."



### Steve and Elisa's Impact



"If we can help keep one family housed, that would be amazing. If that grows over the years and the fund is able to help even more people stay housed, then that's great. But it really was about the Foundation and Catholic Charities allowing us to have a direct impact on individual people," says Elisa. A Family Endowment at the Foundation allows the Baronis to provide consistent, permanent support to these vital programs **FOREVER**. "If [the fund] is able to grow over time and have more impact, that will be a real blessing."

## Maximizing a Matching Gift

*"Investing in your gift is the best way to make a lasting impact"*

How can we maximize our gifts and make a long-lasting impact on the organizations that have been an integral part of our family? This is the question that Ruth and Joseph Rubin asked themselves as they patiently waited for the right opportunity to maximize the impact of their giving.

The Rubins have been parishioners at Church of the Resurrection Parish for 10 years and are an active family at Resurrection School. "We felt supported and welcomed by the church and school when we moved to this area," said Ruth. "We were looking for a way to create a lasting impact for future families so that others could experience the same support and friendship we had."

The idea of a permanent fund interested the Rubins. When Joseph's employer announced a 2:1 matching gift program, they knew it was the perfect opportunity. They started a Family Endowment with a \$10,000 gift and the employer matched 2:1, increasing the fund balance to \$30,000. The Rubin Family Endowment will now grant to Church of the Resurrection and Resurrection School every year, **FOREVER**.

"The fund required some forward thinking and attention, but starting the fund itself was easy," said Joseph. Patience was the biggest requirement in order to make a bigger impact. "Next time we see the opportunity to do a 2:1 matching gift, we want to take advantage of the opportunity again."

*"We are so honored and blessed that the Rubin Family chose our school and parish to receive their generous gift. It's a gift that will have a long-lasting positive impact on the students and it means the world to us." - Jacque Wright, Resurrection School Principal*



### Ruth and Joseph's Impact



Like all the Foundation's endowments, this fund is invested to generate grants and grow the balance every year. After 30 years, The Rubin Family Endowment will have granted over \$55,000 to the parish and school while also more than doubling the fund balance.

### Family Endowment Ideas



- Endow your annual gift so the organizations and ministries you love will receive annual support **FOREVER**
- Build the balance of a Family Endowment by directing the Required Minimum Distribution from your retirement assets to the fund each year
- Plan to create a Family Endowment with a legacy gift via your estate plan after your lifetime

► [catholiccf.org/family-endowments](https://catholiccf.org/family-endowments)





## What is a Donor Advised Fund?

A DAF is a charitable fund from which you can send money to charities across the United States. When you make a donation to your DAF, you receive the tax benefit immediately, however you can take your time deciding to whom and when to make grants.

## The Power of a Catholic Support System

Jordan Thibodeau understands how the support of a Catholic school community can have a lasting impact on a child's life. Jordan's mother was diagnosed with ovarian cancer when he was a toddler, and she fought the disease for 14 years before passing away when he was a freshman in high school.

It was important to his mom that he attend Catholic school despite their limited resources. "My grades weren't good," said Jordan. But the community at St. Justin School didn't want him sent to a public school where "he wouldn't have the stability of the Catholic school system, the rigor, the moral teachings and a community that cares for him." When he was in junior high, his mom went bankrupt. He recalls Kathy Almazol, principal of St. Justin at the time, and some of the moms in the community presenting Jordan's mom with a check. "They had figured out how much she owed in debt, and they paid it off plus they gave her money that she could use to be stable," said Jordan. "I didn't really understand it at the time, but that moment seared into my mind that the Catholic school community would rally around her."

Through the challenges of attending multiple high schools, his grandmother's death, temporary homelessness, working while attending De Anza College, and finding scholarships to attend Santa Clara University, he could always count on the support from the Catholic community that had helped raise him. Eventually he landed a job at Google where he worked for 10 years and founded the Silicon Valley Investors Club. He recently joined Slack's Mergers and Acquisitions team as a People Manager.

***"During all this time in my mind I'm thinking - I have to be sure I give something back."***



Jordan knew he wanted to set up a Donor Advised Fund to facilitate his philanthropy. "I wanted a super simple vehicle where I can just put money in, hopefully beat inflation, but I can easily have checkbook power. I didn't want to have any administrative burden." He chose the Foundation instead of a commercial charitable fund because of our Catholic values and personalized customer service.

### Jordan's Impact



Jordan is passionate about helping kids struggling in grade school because he feels that assistance at this stage of life can have long-term impact. The Catholic network he built at St. Justin School helped him through some of the toughest challenges of his life, and he wants other kids to have access to that same Catholic support system. "Since there aren't as many people giving in this area, I felt that my small pocketbook could make a larger difference."

## What is it like to have a DAF at the Foundation?

### OUR FUND HOLDERS HAVE:

 **Access to Exclusive Events**

Individuals and families with a fund at the Foundation were given access to a live discussion on the topic of impact in grant making. The webinar, entitled **Impact Giving**, featured John M. Sobrato, who shared examples from his journey toward more strategic and impactful giving, and Julia Matsudaira, Senior Vice President of the Impact Advisory at Jordan Park, who shared frameworks and ideas for thinking about impact.



John, Julia and Mary answer questions from the audience during the **Impact Giving** webinar

 **Opportunities to Respond to Immediate Needs**

On December 10, 2021, a violent tornado ripped across Kentucky leaving catastrophic damage in its wake. Our friends at the Catholic Community Foundation in the Diocese of Owensboro reached out to their fellow Catholic Foundations across the country and asked if our donors would help support their local Catholic Charities' response to the disaster. Like on many other occasions, we reached out to our fund holders sharing information about the immediate needs and they responded generously, donating over **\$30,000** to help our brothers and sisters in Kentucky in their hour of need.

 **A Chance to Shape the Services They Receive**

As a true community foundation, we value and encourage our fund holders' continuous feedback. We are eager to learn what areas of work are close to their hearts and how we can ease the process for them to give generously in their area of interest. We listen often and carefully, so that we can present them with the most meaningful opportunities. In our last survey, **75% of DAF Holder respondents said they were satisfied or very satisfied with the Foundation's ability to present giving opportunities.**

### Donor Advised Fund Ideas



- Bunch multiple years of donations into one year to maximize tax benefits
- Use a DAF as a vehicle to start the conversation about philanthropy with your family and get children involved in the grant making process

***"The Foundation did a great job during the pandemic to make us aware of areas most in need, including the needs of the parishes." – Respondent from 2021 DAF Survey***

► [catholiccf.org/donor-advised-funds](https://catholiccf.org/donor-advised-funds)



## What is a Legacy Gift?

A legacy gift is a donation that you leave for an organization after your lifetime. When carried out with discernment, a legacy gift becomes an expression of your deepest values and a wonderful act of stewardship.

## A Legacy of Inspiring Others to be Generous

By Mary Quilici Aumack, Chief Executive Officer

I often refer to the Catholic Community Foundation as a connector – connecting generous people to important ministries and programs. We walk with individuals as they develop their philanthropic strategies. Often these conversations culminate in a legacy plan. For the past 10+ years I have walked that path (or mostly followed along) with Dr. Joseph Krackeler. When I joined the board of the Foundation in 2008, Joe was already involved as a founding member. He provided great leadership in the formation of the Foundation and the Rooted in Faith campaign. In 2010 we commenced deep strategic planning for the Foundation. Joe was central to this planning. He was passionate about the idea of inspiring people to leave “single digit percentages” of their estates to charity. This mantra has stayed with me as we have worked with families to solidify their legacy plans. It is fitting that Joe chose to execute his legacy plans with the Foundation. When I discussed this article with Joe, he told me, “The Foundation has contributed significantly to helping me create my legacy plan.”



### Joe’s Impact



The objective of Joe’s legacy plan is to inspire his four children to continue a tradition of giving. To that end, he has set up a Donor Advised Fund for his family to respond to changing community needs. His goal is that his children will gather to make decisions on important community improvement.

I know that Joe’s greatest hope and joy is to inspire others to his “single digit percentage” approach to leaving a legacy and providing **FOREVER VALUE** to the ministries that formed us and the agencies that seek a better tomorrow.

► [catholiccf.org/give-later](https://catholiccf.org/give-later)



### Legacy Gift Ideas



- Name an organization you love as the beneficiary of your retirement assets. This may be as simple as filling out the proper form.
- Use a gift from your estate to fund a Donor Advised Fund for your children so they can continue your legacy while also gaining ownership over the grant making process.



ASSETS UNDER MANAGEMENT

2021  
\$ 134 MILLION

2020  
\$ 95 MILLION



### 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.

### Impact Investing

Increasingly, families and institutions are including their investment strategy in their plans for advocacy and impact. This is true for the Foundation as well. We have always followed Catholic investing guidelines. In 2021 the U.S. Conference of Catholic Bishops updated the guidance, including more emphasis on impact. We are pleased that our partnership with Jordan Park provides a platform for prudent inclusion of impact investing.

► To learn more, visit [catholiccf.org/investment-management](https://catholiccf.org/investment-management)



## ► Investment Objectives

- 1 ► 1
- 2 ► 2
- 3 ► 3

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

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

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



The Foundation partners closely with professionals in the estate planning, wealth management, accounting, and insurance fields. Our goal is to educate these individuals about

our services so that, when appropriate, they can refer their clients to us. In 2021 we partnered with many advisors to help families grow their impact and achieve their philanthropic goals.

## Family Funds: CARES Act

In 2020 and 2021, the Foundation helped donors open funds that took advantage of the CARES Act and CAA legislation. While the legislation was only temporary, creating these funds expanded our knowledge in important ways. Professional advisors took advantage of our deep knowledge on this subject and we helped clients find the appropriate solution for their philanthropic goals.

*“My client was interested in taking advantage of the expanded charitable giving provisions of the CARES/CAA legislation. The Catholic Community Foundation listened to my client’s needs and offered creative and appropriate fund options.”*  
**BRIAN SHETLER,**  
*Partner, Berliner Cohen*



## Legacy Planning

We can add our knowledge to conversations with clients about their goals for philanthropy after their lifetime. Our creative and customizable solutions can be adapted to fit the individual’s needs and desires.

*“Our clients looked to the Catholic Community Foundation to help them establish a fund that would help them not only gift to charity during their lifetimes, but leave a permanent legacy of giving to the organizations they care most about after they are gone.”*  
**MARK JOHNSEN,**  
*Chief Wealth Architect, CEO & Founder, Wealth Architects*



## Donor Advised Funds

We are an excellent Donor Advised Fund provider for people who are looking for a personalized experience without losing the convenience of an online interface.



*“My client needed a simple, high-tech, full-service Donor Advised Fund sponsor. The Catholic Community Foundation was a great fit. They work well with both the client and the tax professional. I highly recommend the Foundation.”*  
**FRANK BOITANO,**  
*Tax Principal, Abbott, Stringham & Lynch*

► Find resources for professional advisors at [catholicccf.org/professional-advisors](https://catholicccf.org/professional-advisors)

## ADVISOR STEERING COMMITTEE

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 Charles Volpe, *Berliner Cohen LLP*

# Impact by The Numbers



As of 12/31/2021

## GRANTS

**\$43,300,000**

Total Granted Since Inception  
(2008-2021)

**785**

Total Number of Grants  
in 2021

## SPRING GRANT CYCLE

**\$290,000**

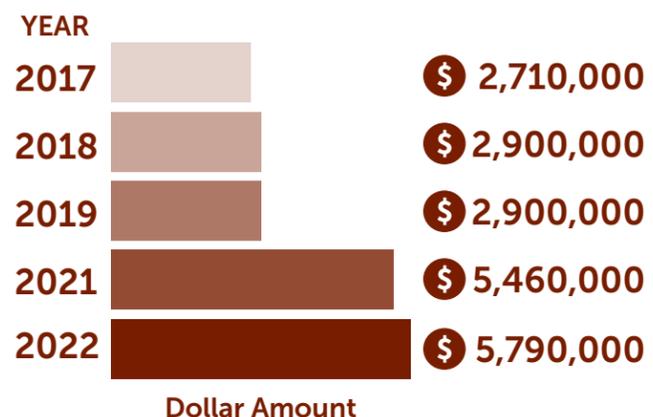
TOTAL AMOUNT AWARDED

**39%**

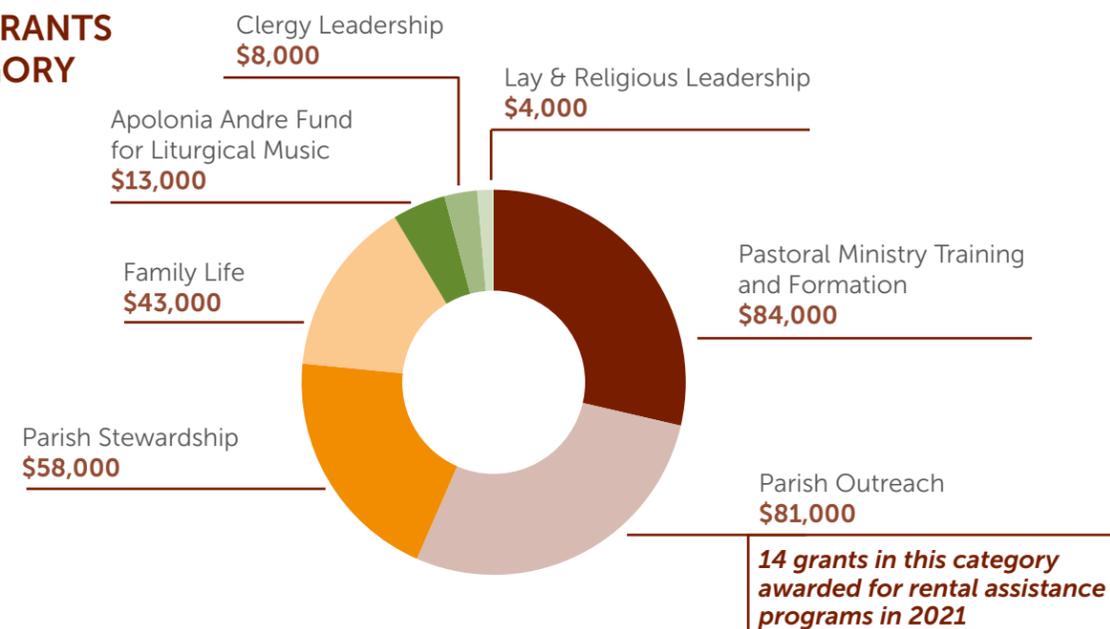
OF NEED MET

## 5-Year Granting History

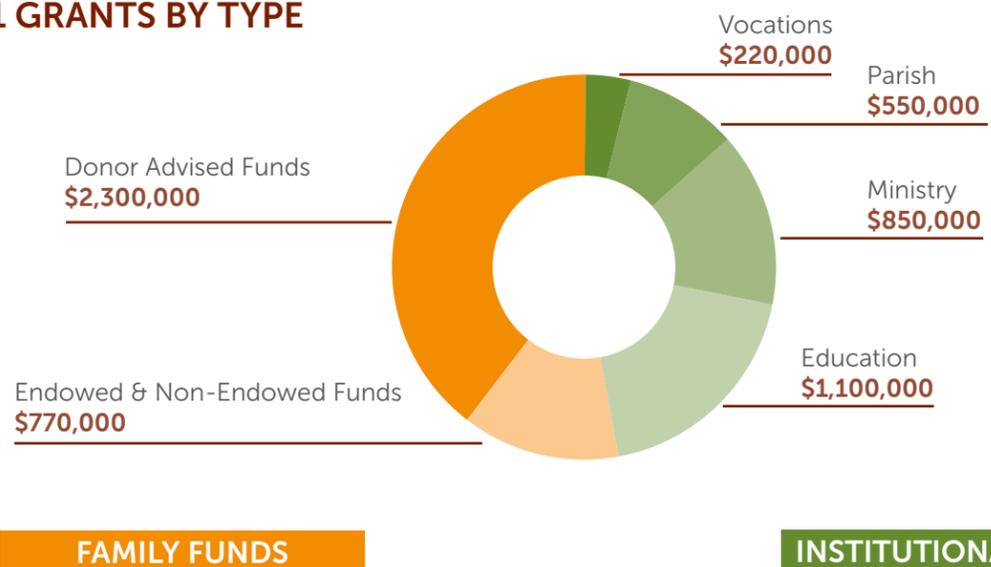
The Foundation reached record levels of grant making in 2020 thanks to the immense response of our community to the needs of the pandemic. We are pleased that that the 2020 grant making was not a one-year spike. Grant making metrics are our most important benchmark, and we are pleased to have exceeded our goals yet again thanks to the generosity of our donors.



## SPRING GRANTS BY CATEGORY



## 2021 GRANTS BY TYPE



## Two Year Grant Recipient Cathedral Social Ministries John XXIII Health Center

This program is a Cathedral Parish partnership with Catholic Charities, Gardner Healthcare, Kaiser Fellowship program, SJSU Nursing program, and the Order of Malta. They are dedicated to improving the health status of the homeless community, migrant farm workers, immigrants, the elderly, and all the most vulnerable members of society. Their mission is to provide integrated, comprehensive primary health care and social services, case-management, substance abuse counseling, COVID-19 testing and vaccines, advocacy, and service navigation resulting in quality treatment that is free, safe, respectful, and culturally and linguistically appropriate.



**\$ 163,000**

Total cumulative grants to the Cathedral Social Ministries program from the Parish Outreach category over the past 13 years



## Institutional Funds

### Funds Defined By Purpose

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 Endowment  
 Parish Repair & Refurbishment Endowment  
 Parish Stewardship Endowment  
 Pastoral Ministry Training & Formation Endowment  
 Pillar of Hope Fund for Student Counseling and Intervention Services

## Designated Funds

### Endowment for Ministries and Organizations

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 Program  
 Youth Ministry

### Endowments for Education & Schools

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 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

New Parish Acquisition & Construction

### Endowments for Parishes

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 Billiard Parish  
     Saint Julie Billiard Endowment for Divine Mercy & Special Needs Outreach  
     Saint Julie Billiard Parish Next Generation Glover Endowment for Saint Julie's Outreach & Immersion

► For descriptions of our funds and to donate, visit [catholiccf.org/funds](http://catholiccf.org/funds)



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

## Family Funds Donor Advised Funds

Anonymous Funds (19)  
 Ed and Kathy Almazol Charitable Fund  
 Anthony Gift Fund  
 Mary & Douglass Aumack Charitable Fund  
 Richard Baer and Bella Babot Fund  
 Bakeis Family Charitable Fund  
 Barn Door 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  
 Anita Cuevas Scholarship Fund  
 Desbieys Family Fund  
 Rev. Hao Dinh Charitable Fund  
 Flynn Family Charitable Fund  
 Daniel E Furtado Donor Advised Fund  
 Galetto-Dugoni Charitable Fund  
 Catherine A. Gallagher Charitable Fund in memory of William Danser  
 Genovese Family Charitable Fund  
 Gilbert Family Charitable Fund  
 Terry D. Graff, Trustee Donor Advised 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  
 Milligan Family Donor Advised Fund  
 Mark & Bertha Minnihan Fund  
 George and Jill Montanari Charitable 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  
 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

## Endowed & Non-Endowed Family Funds

6 Anonymous Funds  
 Stephen and Elisa Baroni Family Endowment  
 James W. Lopes Endowment  
 Robert and Carol Peters Family Endowment  
 Poncetta Family Endowment  
 Rubin Family Endowment  
 Raymond and Susan Triplett Endowment for Catholic Ministry

► For more information, visit [catholiccf.org/family-funds](http://catholiccf.org/family-funds)





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The Catholic Community Foundation

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The Board and Staff of the Foundation would like to thank **John M. Sobrato** for his 9 years of service as a Director.

► See photos and bios of all Board Members at [catholiccf.org/board](https://www.catholiccf.org/board)



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