



# THE CATHOLIC COMMUNITY FOUNDATION OF SANTA CLARA COUNTY

*“It is like a person building a house who digs deep and lays a foundation on solid rock. When the floodwaters rise and break against that house, it stands firm because it is well built.” Luke 6:48*

Dear Friends,

Through your amazing generosity our Catholic ministries and parishes have received over \$750,000 of grants since 2009. Inside, you can read about some of the ways that your generosity is supporting innovative outreach, stewardship and pastoral ministry.

During the past year we launched on a trajectory that will leverage the philanthropic spirit of our Catholic community. By adopting a community foundation model we can strengthen and support Catholic ministry in Santa Clara County. Endowed funds will provide *Forever Value* to our ministries, permanent financial support to assist them in their service to the community for years to come.

Our goal is simple: Driven by our intense gratitude for the gift of Jesus Christ in the Eucharist, we will work together to enhance Catholic philanthropy. We hope you will join us.

Gratefully,

**Mary Quilici Aumack**  
EXECUTIVE DIRECTOR

**Ron Pelzel**  
BOARD PRESIDENT



**See inside for:**

- Stories from parishes
- New funds
- Financial update

**Be inspired...**

777 N. First St., Suite 490 • San Jose, CA 95112 • [www.cfoscc.org](http://www.cfoscc.org)

Phone: 408.995.5219 • Fax: 408.995.5865 • [info@cfoscc.org](mailto:info@cfoscc.org)





## Parish Outreach

Queen of Apostles & St. Maria Goretti Parishes

*“Each of you should use whatever gift you have received to serve others, as faithful stewards of God’s grace.” 1 Peter 4:10*

Many Catholic communities actively serve others through their programs and volunteers.

Father Jim Mifsud founded the ASCENT employment program 28 years ago at Queen of Apostles and it continues to provide valuable support for the unemployed in our community. ASCENT serves everyone from professionals to inmates (through their jail outreach program). Dedicated volunteers Kevin Ryan and Director Eleazar Morales have made a huge commitment to the center’s daily operations. Eleazar’s passion for placing people in jobs is fueled this year by a second grant from the Catholic Community Foundation; “There’s no greater satisfaction than when a client returns to report (s)he got a job.”

The grant from the Foundation will be used to fund job seminars at Sacred Heart Community Center enabling job placement by providing tips on goal setting, resume writing, job searching and interview skills.



St. Maria Goretti also leverages Foundation funds for outreach efforts by providing volunteers the resources to do what they do best, step-up and care for others. Seniors receive a hot meal and support after Mass several times a month. The homeless in the area are hand-delivered much needed lunch bags and hygienic supplies monthly from the Spanish Youth Ministry team. St. Maria Goretti’s partnership with PACT influenced local education improvements by increasing Catholic voter turnout last fall.

According to Business Administrator Victor Espinoza “Not only does the community benefit from these efforts but our volunteers report having a new awareness, sense of responsibility and a desire to do more for society by their faith.”



**\$265,000** in total disbursed in the area of Parish Outreach



## Parish Stewardship

St. Elizabeth Parish

With the aid of a grant from the Catholic Community Foundation, St. Elizabeth Parish undertook a capital campaign for an 8-classroom parish ministry center, with an emphasis on fully including its multilingual community in the fundraising efforts. They used the input and experience of the leadership teams of many parish organizations and ethnic communities to plan and implement the \$3.5 million campaign starting in 2012.



Grant funds were used for development of program materials and a video explaining the capital campaign to parishioners; both were also translated into Vietnamese and Spanish.



Parish Stewardship has granted **\$219,000** to date

## Pastoral Ministry

St. Mary of the Assumption Croatian Parish



*“If the children come, the parents will follow.”*

Four years ago St. Mary of the Assumption Croatian Parish had one priest and minimal support for faith formation instruction. Fr. Gveric knew engaging the children was key to growing the parish.

Fortunately, Gordy Grbic, a mother of 4 with a degree in religious studies saw the need and volunteered. She leveraged a Canadian model setting up a program incorporating Catholic teaching along with Croatian language classes. She recruited teachers from as far as Burlingame and over a summer they developed the Friday night program which instructs 75 children during the school year.

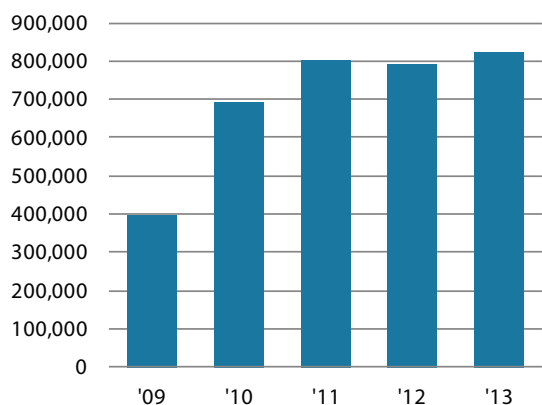
The curriculum includes religious studies and Croatian language instruction with a 15-minute soccer break. The curriculum was developed to incorporate games and fun activities to nurture interaction and encourage cultural knowledge sharing while strengthening their Catholic experience.



To date, we have granted **\$314,000** for Pastoral Ministry

## Grants from Endowments

Total Grants through June 30, 2013 = \$7.3 Million



In addition to the Grants from Endowments we granted \$3.8 Million for Our Lady of Refuge Parish in '11-'12

## Designated Endowment



### Notre Dame San Jose

*“Teach them what they need to know for life.”*

These were the words of St. Julie Billiart, foundress of the Sisters of Notre Dame de Namur. If you’ve ever visited Notre Dame High School in downtown San Jose, you know that St. Julie’s wishes are passionately and joyfully carried out. The air is filled with confidence, creativity and spirituality. In order to make this experience available to young women of all backgrounds, the leadership team at NDSJ is committed to growing their endowment for tuition assistance. Recently they started a designated endowment at the Catholic Community Foundation. Through this partnership we will work to make more donors aware of the “return on investment” evident in the students, staff and graduates of Notre Dame.



## Field of Interest Endowment



### Apolonia Andre Fund for Liturgical Music

*“I will sing of your love and justice. I will praise you, LORD, with songs.” Psalm 101:1*

When Charmaine Warmenhoven was growing up, she happily sat up front at Mass to listen to her mother playing the organ. Usually this was in the Main Post Chapel on the military bases where her father served. She has always had a deep appreciation for the important role of music in our liturgical celebrations. Charmaine chaired the Grants Committee of the Foundation for several years. Through that activity she learned of the many effective programs in the parishes that can be strengthened by grants. She and Dan decided to start the *Apolonia Andre Fund for Liturgical Music*, in honor of her mother. This is a permanently endowed fund. Income from the fund will be used to give grants to worship communities to enhance their music ministry. We are privileged to honor this memory by supporting future liturgical musicians.



## Donor Advised Fund

*Providing Support Forever* 

One of our donors supports many Catholic ministries in our community. Each year they make donations to these various organizations. At the same time, they have been building up a Donor Advised Fund with these groups in mind. Their legacy plan is to convert their fund into individual endowments. Through this thoughtful planning, each organization will continue to receive annual support from them. This is true *Forever Value*. Upon learning of our work, this couple knew that the Catholic Community Foundation would be an ideal vehicle for them to assure that their support for these ministries would continue through permanent endowments.



## Start a Fund with Us

Contact us: [info@cfoscc.org](mailto:info@cfoscc.org)

There are many ways to get involved with the Foundation. Things to consider:

- start a Donor Advised Fund
- transition a family foundation to us
- start a designated endowment for a ministry you value (the nuns who taught you or your children?)
- start a field of interest endowment, to enrich ministry like the new fund for liturgical music

# Stewards of your Philanthropy

The active collections phase for the Rooted in Faith campaign ended December 2012.

The Catholic Community Foundation continues to develop endowed funds to benefit the long term financial health of our Catholic community. Please contact us if you are interested in donating to one of our existing funds or starting a new fund.

The final campaign snapshot is shown below.



## Investment Committee

**Back row:** Jerome A. Bellotti (Owner of Jerome A. Bellotti and Associates, a public accounting firm), Felipe Luna (CEO of Concert Global, a financial services company), John M. Sobrato (CEO of The Sobrato Organization)

**Front row:** Patrick J. Waite (Retired Corporate Executive and Community Volunteer), Joseph Krackeler (PhD, Consultant)

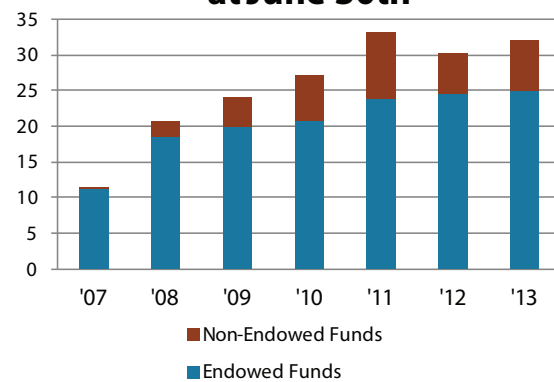
Snapshot (\$ in Millions) as of 6/30/13		
	12 month period	From Inception
Beginning Balance	\$30.3	\$ -
Collections	1.2	68.4
Investment Gains	2.7	7.3
Disbursements*	2.3	43.8
Cash & Investments	31.9	31.9

\*includes: grants, campaign costs, 2007 ADA, all expenses

The Foundation's most important responsibility is management of the funds so generously entrusted to our care. Reflecting this, our investment approach includes:

- An allocation approach balancing the need for investment growth with a goal of long term asset preservation.
- All investments meet the requirements of the U.S. Conference of Catholic Bishops.

## Historical Investment Balances at June 30th



To see the list of disbursements by fund visit our website at

[www.cfoscc.org/rooted-in-faith/](http://www.cfoscc.org/rooted-in-faith/)



## Board of Directors

- Ronald G. Pelzel, *President & Chairman*  
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 James P. Cashman  
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 Joseph Krackeler  
 Kathleen Muller  
 John M. Sobrato

## Staff

- Mary Quilici Aumack  
 Peggy Bradley  
 Sean Finigan  
 Susan Zucca



**Our Lady of Refuge**  
Granted \$3.8 million



**Education**  
\$769,000 granted to date



**Institute for Leadership in Ministry**  
\$297,000 granted to date



**Seminarian Training**  
\$319,000 granted to date

Together we are creating Forever Value for Catholic ministries.