



THE CATHOLIC COMMUNITY FOUNDATION OF SANTA CLARA COUNTY

*“You planted them; they have taken root,
they keep on growing and bearing fruit.”*

Jeremiah 12:2

Dear Friends,

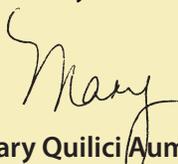
Every spring, we give grants to support the work of Catholic organizations. This year we passed the \$1M mark in cumulative grants to these ministries since 2009. These effective programs that enrich our faith communities and support our neighbors are impressive and inspiring. You can read some examples on page 2.

Total grants from all endowments for the year ending June 30 were also over \$1M. During that time we added 9 new funds totaling \$7.7M. We are on a growth path! We are grateful to our superb board and staff for their immeasurable contributions to our trajectory.

As you know, we are focused on providing **Forever Value** through the development of endowed funds. One example is the parish endowment. See page 3 to read about new endowments that have been started by parishioners. We are both pleased to be in the group starting the first endowment for our parish.

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


Ronald G. Pelzel
Board Chair



See inside for:

- Impact of Grants
- Parish Endowments
- Financial Update

Be inspired...



777 N. First St., Suite 490
San Jose, CA 95112
www.cfoscc.org
Phone: 408.995.5219
Fax: 408.995.5865
info@cfoscc.org

Over \$1 Million Granted Since 2009

Parish Stewardship

This year St. Julie Billiart celebrated its 40th anniversary. When plans for the celebration began, it was quickly apparent that St. Julie's full history had never been properly recorded. Sharon Aeria, Director of Communications and Development, wanted to be sure the parish history, especially stories from the original founders, was recorded for generations to come.

Funds were granted in 2013 for the Historical Multi-Media Project which took pictures, old booklets, founder interviews, etc., and digitized them into the first repository of parish history. "Everyone at St. Julie has come with a story," said Sharon, "and this was our chance to capture and share those moments."

Through the process of interviewing their founders, so many wonderful stories have been shared about the early days of St. Julie. One of these interesting stories is that the church construction was not yet completed when the first Mass was held 40 years ago! Stories such as these will be included in the book of St. Julie History that Sharon and her team are currently working on.

This project shares the theme of the Anniversary Mass: Past, Present, and Future. This ongoing project will bring generations of St. Julie parishioners together in the years to come.



Parish Outreach

The St. Vincent de Paul Society has a strong presence throughout our Diocese. Every parish conference has dedicated volunteers working to better serve their community. Eight conferences were awarded funds this year to further their reach.

Dora Hyson, President of St. Lucy's conference, has been involved with the program for 10 years. Clients can visit the conference five days a week from 10:00am-11:45am to seek help through services such as monetary support and groceries for their families.

Once a month, clients can request a bag of groceries, filled with items from the dry food pantry, and a supplemental \$10 grocery gift card. The pantry is stocked by parishioners and through

partnerships with Independent From Hunger, who donated 230 pounds of groceries in July. Clients can also request monetary support once a year to help with costs such as rent and utilities. For the last two years, grants from the Foundation have been the biggest source of support for the conference, allowing them to get more clients back on their feet.

As Dora said, "It's a team effort for us to do this. All we can do is direct them to a certain area to try and get them the help they need."

Grants from the Foundation have been the biggest source of support for the conference.

Apolonia Andre Fund For Liturgical Music

Granting for the first time this year, the Apolonia Andre Fund for Liturgical Music aims to enrich parish worship life and strengthen the community around the Eucharistic celebration. The Pastoral Musicians Music Boot Camp hopes to enhance these elements in choirs throughout our Diocese.

Julie Wind, Director of Music at the Cathedral Basilica, is organizing the event. Musicians and cantors will be able to expand their repertoires and skills through classes such as tuning the choir, picking appropriate music, how to better direct the choir, and more.

The five-day Boot Camp will take place at the Cathedral in January 2015, and will culminate with a Mass where participants will use their newly

learned skills. Through this Boot Camp, Julie hopes to show people that "the Cathedral isn't just a place to visit—it's somewhere to learn."

Please keep an eye out for more information from Julie in the months to come.



Pastoral Ministry & Training Formation

Catholic on Purpose launched in August 2013 with six pilot parishes: St. Catherine, St. Elizabeth, St. Francis of Assisi, St. Lucy, Holy Spirit, and Our Lady Star of the Sea. The program will focus on evangelization within our Diocese.

St. Catherine chose to focus on evangelization of youth and young adults, and adult formation. Anna Quinones, Chief Development Officer, said, "We want people to be excited about being Catholic again." To do that, Anna has applied to the

Foundation for the last two years to fund various evangelization projects.

This year a new Summer Challenge program was started for youth. The five-day leadership and service camp consisted of Bible Study in the morning and community service in the afternoon. It was a success and two are planned for next summer.

Last fall, to target adult formation, Matthew Kelly came and spoke to over 700 people from

San Jose and surrounding dioceses. Anna hopes the Lisa Hendey event in November will be just as successful.

The *Catholic on Purpose* team at St. Catherine is getting people excited about being Catholic again and achieving a deepened relationship with Christ. The Foundation is so glad to partner with St. Catherine and the Diocese for this exciting new program.

St. Catherine is getting people excited about being Catholic again.

The Parish Endowment

Parish life offers us the opportunity to fill our spirit with God's overabundance of love and mercy. It is where we share faith, find fellowship, and are renewed through the Eucharist. And all who are called to the table share in the blessings and needs of the community.

One way to strengthen our ministry is through permanent endowment.

What is an endowment?

An endowment is a fund created to support a specific entity or purpose. The fund is invested, and only a portion of the income is used for the specified purpose. Therefore, the fund grows and is available for perpetuity.

How does a parish endowment work?

- It takes \$1,000 to start a new parish or school endowment by parishioner(s)
- Contributions to the endowment can come from any individual, family, or group(s)
- Contributions may not come from existing parish funds
- Funds are managed and invested by the Catholic Community Foundation
- Endowments are always open for new gifts and bequests
- The distributions will range between 3%-5% annually, and are only for parish use
- Spending of the distribution is overseen by the governing body of the parish



Most Rev. Thomas A. Daly & Dr. Joseph Krackeler in front of St. Nicholas Parish

By sharing our gifts now, through an endowment, we are providing for future generations. Imagine knowing that because of your decision today, your parish will receive a grant every year, even beyond 100 years from now. We call this **Forever Value**.

Parish endowments can have a specific focus like building maintenance, liturgical support, technology upgrades, education, assisting the poor, or general operations. Gifts can take many forms, including cash, securities, pledges over time, real estate, or bequests.

It is the goal of the Catholic Community Foundation to help develop endowments for all of our parishes and schools. We will work with these communities as appropriate to grow the funds.

If you'd like to start an endowment for your parish or school: Call Brianna Martin at the Catholic Community Foundation of Santa Clara County, 408.995.5219, ext. 21.

New Endowments for Future Support

In 2011 all people of the Diocese of San Jose welcomed our new parish community, Our Lady of Refuge. Three years later the community is thriving. As with all parishes, there is a need to secure long term financial stability.

As part of the fundraising efforts to help give a solid start to the parish, an endowed fund was established. This fund is managed by the Catholic Community Foundation for the benefit of the parish.

The fund is available for additional donations by any individual or family.

Since we launched our efforts toward new endowments, several funds have been established:

- St. Clare
- St. Francis of Assisi
- St. Mary of the Immaculate Conception
- St. Nicholas

It's not sufficient to just start an endowment. We will work with the parishes to give life to this fund, and to grow it so that it can generate meaningful support. This is our mission: to help grow ministry and sacraments by strengthening financial support.



Pat Waite & Rev. Msgr. Gene O'Donnell, discussing a new parish endowment for St. Francis of Assisi



"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

Endowments Previously Established

Catholic Academy
Holy Spirit (Parish & School)
Queen of Apostles (School)
Resurrection (School)
Sacred Heart of Jesus (Parish)
St. Anthony (Parish)
St. Catherine of Alexandria (Parish & School)
St. Dominic / Stanford
St. Elizabeth Seton (School)

St. Frances Cabrini (School)
St. Francis of Assisi (Parish)
St. John Vianney (School)
St. Joseph, Mountain View (School)
St. Joseph of Cupertino (Parish & School)
St. Lawrence (Parish, School, & Academy)
St. Lucy (School)

St. Martin of Tours (School)
St. Martin, Sunnyvale (Parish)
St. Mary of the Immaculate Conception (School)
St. Mary, Gilroy (School)
St. Nicholas (School)
St. Patrick School
St. Simon (School)
St. Victor (School)
St. William (Parish)

Start a Fund with Us

Imagine building **Forever Value**, today!

- Designated Endowments to support your parish (or another specific ministry or organization) now and forever.
- Field of Interest Endowments create an area for grantmaking.
- Donor Advised Funds to manage charitable donations for an individual or family.
- Legacy planning for charitable giving, through a bequest.

Providing permanent financial support to Catholic ministries in Santa Clara County.
Contact us at info@cfoscc.org

In addition to parish endowments, the Foundation is honored to support Catholic ministries and organizations through the following funds:

Designated Endowments

- St. Joseph the Builder Endowment
- Cathedral Basilica Building Maintenance
- Catholic Charities Endowment
- Catholic Extension Endowment
- Education Tuition Assistance Endowment
- Diaconate Training Endowment
- ILM Lay Leadership Endowment
- Notre Dame High School Education Fund
- Parish Refurbishment & Repair Endowment
- Seminarian Training Endowment
- Social Justice Education Endowment
- Young Adult Ministry Endowment
- Youth Ministry Endowment

Field of Interest Endowments

- Apolonia Andre Fund for Liturgical Music
- Parish Outreach Endowment
- Parish Stewardship Endowment
- Pastoral Ministry Endowment

New Parish Acquisition and Construction

Various Donor Advised Funds

Please join our list of Founders.

- Anonymous
- Stephen & Mary Almassy
- Philip & Linda Anthony
- Gmon Antony & Alice Jacob
- Mary & Douglass Aumack
- Randy & Melisse Basso
- Maria & Eric Bellafronto
- Jerome & Kimberley Bellotti
- Rev. Joseph M. Benedict
- Maribeth Benham
- Anne Biagini
- Frank & Gayle Boitano
- Mark & Racquel Brown
- Anne & Jim Cashman
- B.J. & Isabel Cassin
- Rev. Msgr. Francis Cilia
- Thomas & Mary Crotty
- Most Rev. Thomas A. Daly
- Robert & Mairead Donohue
- David & Elizabeth Ferrari
- Robin & Gerry Ferrari
- Karen Fierravanti

- Paul & Barbara Gentzkow
- Jerry Glembocki & Juliette Davis
- Judge Thomas & Patricia Hastings
- Mary Ann & Tom Hogan
- Loreen & Daniel Huddleston
- Robert & Christie Jahncke
- William & Danielle James
- Rev. Saju Joseph
- Michael & Corazon Kalt
- Gregory Kepferle & Jean Blomquist
- Joseph & Rita Krackeler
- Rev. Msgr. Alexander Larkin
- Rev. Justin Le
- Jack & Carol Lewis
- Robert W. Lewis
- Felipe & Elizabeth Luna
- Most. Rev. Patrick J. McGrath
- Rev. Brendan McGuire
- Rev. Msgr. Joseph Milani
- Anne & Steve Milligan
- Mark & Bertha Minnihan
- Nicholas & Jo Anne Moore
- Rev. Robert Moran

- Anne Muller
- Peter & Kathleen Muller
- Joe Naylor & Yosuke Chikamoto
- Thanh Nguyen
- Lon & Peggy Normandin
- Timothy J. O'Donnell
- Thomas P. O'Donnell
- Matthew & Aira Offutt
- Ron & Sheryl Pelzel
- Robert & Carol Peters
- Adolph & Rosemary Quilici
- Rev. Rick Rodoni
- Ann & Bill Skeet
- John M. Sobrato
- Rev. Gary Thomas
- Raymond & Susan Triplett
- John & Melanie Troini
- Pat & Ginny Waite
- Charmaine & Dan Warmenhoven
- Jeffrey & Melissa Waters
- Robert & Janet Wedig
- Frank & Teresa Yu

We are forever indebted to these visionaries who lead through example.



Education
\$930,000 granted to date



Seminarian Training
\$380,000 granted to date

Summing it all up – A message from Mary

I meet frequently with pastors and community members. Sometimes I get this question: "Why do we need yet one more good Catholic cause; how is this different?" The answer is twofold:

- We focus on developing endowed funds for Catholic ministries, and
- We educate donors on these activities, matching philanthropic intent with effective programs.

Here's one great story of matching: This year we visited the Learning and Loving Education Center in Morgan Hill. This is a Catholic program that educates women while providing childcare and pre-school for their children. The director told me that they need a play structure. The very next day, I got a call from a donor. He said "I have a need, and I think you're just the right person to ask. My college alumni group is looking for a project." Well...I had just the right project. This group will take care of everything, providing much needed play space at the center.

That is just one story. We can talk about: the after school homework program at Sacred Heart, the work of Catholic Charities, the pantries and job programs at many parishes, the deep value of Catholic education.

Welcome to my world, where we have the opportunity to provide *Forever Value*, and to invite members of our community to participate. I hope you'll join us.

Mary

Financial Snapshot

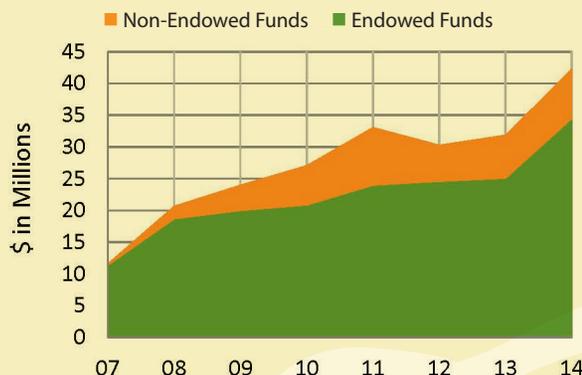
(\$ 000's)

	12 months Ending 6/30/14	Since Inception
Beginning Balance	32,000	-
Contributions from Families For:		
Endowments	300	7,200
Donor Advised Funds	600	600
Unrestricted	600	62,300
Organization Endowment Transfers	7,000	7,000
Gains	4,200	11,500
Grants from:		
Endowments	1,100	4,600
Donor Advised Funds	-	-
Direct Fund & Parish Acquisition	100	19,200
Other Disbursements (Includes Parish Share & 2007 ADA)	800	22,100
Ending Cash & Investments	42,700	42,700

Board of Directors

- Ronald G. Pelzel,
President & Chairman
- Thomas Hogan, *Secretary*
- Patrick J. Waite, *Treasurer*
- Jerome A. Bellotti
- James P. Cashman
- Thomas Crotty
- Gerry Ferrari
- Felipe Luna
- Kathleen Muller
- John M. Sobrato
- Charmaine Warmenhoven

Investment Balances at June 30



Staff

- Mary Quilici Aumack
- Peggy Bradley
- Sean P. Finigan
- Brianna M. Martin

Visit our website at www.cfoscc.org



Together we are creating Forever Value for Catholic ministries.