For a church that started as a small mission of a neighboring parish and held its first Mass in an American Legion Hall, St. John Neumann, Sunbury, has grown by leaps and bounds. Nearly 40 years later, parishioners gather in a beautiful structure that serves as a place to call home and acts as the heart of their Catholic community.

In less than 10 years, this parish grew over 200%, from 400 families to more than 1,300 families. If you ask most people how St. John Neumann accomplished this, they’ll point to their Pastor, Father David Sizemore, and his team. Father Dave, however, says all of the glory and grace belongs to God.

Father Dave arrived at St. John Neumann in 2005, and began making swift changes. Within a few months, he implemented an Annual Giving Program. He promised his parishioners that he would only ask for money in three areas: the offertory to fund daily operations and programs, the Bishop’s Annual Appeal to support the diocese, and for capital campaigns. In return, he asked that families be intentional and progressive in their giving, which would allow the parish to plan and stick to a budget.

"By just organizing the parish, organizing our giving and, most importantly, organizing the faith life of the parish, we could really concentrate on transformative opportunities to grow in our faith," Father Dave explained.

CONTINUED ON PAGE 3
Dear Friends,

The 2014 fiscal year saw tremendous growth and incredible impact in support of The Catholic Foundation’s four Pillars: Catholic Education, Social Services, Vocations and Parish Life. Once again, we had a record-breaking year – our final calculations show that we awarded over $6.5 million in grants! I eagerly anticipate sharing our many other accomplishments in our upcoming Annual Report.

Just a few weeks ago at Dei Gratia, Matthew Kelly gave a speech that touched us all deeply. In it, he spoke to the simple profound truths that aren’t given the attention and recognition they both deserve and need, including awakening our “sleeping” Brothers and Sisters in the Church. Kelly spoke convincingly about many things, but at the end, we were left with a simple message: engaging even just 1% of Catholics could change the world. The foundation of this message, however, was the even more profound and infinitely simpler idea: hope.

Over the past year, The Catholic Foundation made significant strides in furthering the Catholic mission. Of our $6.5 million in grants, over $2.8 million went to Catholic Education and Faith Formation, touching the lives of tens of thousands of people in various stages of their faith journey. While this is a wonderful statistic, with your help we can cast an even wider net and bring more people into the faith, as well as re-engage more of our “sleeping” Brothers and Sisters.

Our goal is to help provide a firm financial foundation upon which parishes can grow their ministries. It is our hope that the financial support we provide will better enable parishes to build up their faith formation efforts, therefore enhancing the spiritual lives of their parishioners.

Much of the support to our parishes comes from endowment funds established by each church. Over the years, many of you have contributed to an endowment fund that directly benefits your beloved church; if you have not, I encourage you to consider honoring your church in this way.

Perhaps one of the best ways to support your parish is through the leaving of a bequest, a gift, through provisions of one’s will, to your parish endowment fund. Even if giving seems impossible, due to current financial difficulties or the like, there are many forms of bequests that account for such things and make it possible. For instance, an individual may give through her or his life insurance policy, retirement plan, or even donate real estate, such as one’s house. Anyone who notifies The Catholic Foundation of their plan to leave a future gift will be recognized through membership in our Kyrie Bequest Society.

There is in us a great hope for the future. For as great as the need is, and as great as the difficulties will be, our hope is greater—Our God is greater.

In Christ,

[Signature]

P.S. – We want to better meet the needs of our donors, grant recipients and other friends. Please complete the enclosed survey to help guide us in the right direction!

---

Laurels

The Catholic Foundation just completed a record-breaking year for impact, with $6.5 million distributed in grants.

Announcement

1. The Catholic Foundation is pleased to partner with the Office of Marriage & Family Life to establish the Strengthen Marriages & Family Life Fund. To contribute to this fund, visit catholic-foundation.org/StrongFamilies.

2. Now offering: DonorCentral® A portal that gives you secure access to your fund information and statements online. You can even make Donor Advised Fund grant suggestions online! If you are a current fundholder, you should have received login information in the mail. If you have not, please contact us at 614-443-8893.

Rest in Peace

God recently received the following fundholders, Kyrie Bequest Society members, or other individuals into eternal life with Him:

- Donald Barcza, former trustee of The Catholic Foundation
- Monsignor Anthony Borrelli
- Father Robert Gately
- Joyce Kozlowski
- Thomas Maloney
- Elizabeth O’Brien
- Sally O’Keefe
- Father Richard Pendolphi
- Patricia Rubeck

Eternal rest grant unto them, O Lord, and let perpetual light shine upon them. May the soul of the faithful departed, through the mercy of God, rest in peace.
In just a few short years, over 70% of parishioners were giving to the offertory in an identifiable way (up from 23%). In turn, this allowed Father Dave to build up the faith, adding women’s and men’s faith sharing groups, cultivating PSR and high school youth groups, and offering more adult faith formation opportunities.

“If you don’t feed them, they won’t take care of the parish. It has to be both, together,” Father Dave explained, referring to the symbiotic relationship between programming and the offertory.

As St. John Neumann expanded its faith formation opportunities, it also quickly paid off debt and developed a 10-year Master Plan that launched in 2010. St. John Neumann continued to grow staff and ministries, and launched a capital campaign to build a 21,000 sq. ft. Faith & Family Center to serve as the lifeblood of parish activities. The parish added office space, and even brought in counseling services to minister to the sick and hurting.

“As we were doing this, we were getting 100 new families a year to join the parish, and our Masses were overflowing,” said Jackie Sutton, Development Director at St. John Neumann.

The church was bursting at the seams, so Father Dave approached the parish and asked families to extend their pledges and gifts from the 2011 capital campaign to help expand and renovate the church. He expected it to take a few years to raise the funds needed, but within eight months the church was breaking ground. St. John Neumann completed the expansion in 2013, with a church three times its original size.

“We pretty much accomplished, in four years, our 10-year Master Plan,” Jackie explained.

“It was incredible. Praise God!” Father Dave added.

The team at St. John Neumann is taking a three-pronged approach to a new Master Plan, focusing on outreach to the poor, continuing spiritual growth, and funding endowments for the future. Sunbury is on the ascent right now, as people are moving into the parish and the neighborhood. Father Dave explained that in a time like this, parishes grow their buildings, their ministries, their offertories and their outreach — but they should also focus on growing endowments. The endowments will provide future funds to maintain the buildings, to continue to offer ministries and to care for the poor.

“Now is the time to do a major endowment and spiritual campaign, to grow our endowments and to engage our parishioners in planned giving,” he said. “Twenty, forty, sixty years from now, when the neighborhood starts to decline as people move away, the parish will be a beacon of light.”

“We have to look to the future,” he added.

St. John Neumann has three Endowment Funds at The Catholic Foundation:

1. The St. John Neumann Capital Endowment Fund (for future building maintenance)
2. The St. John Neumann Ministries & Programs Endowment Fund (for future spiritual growth)
3. The St. John Neumann Parish Outreach Endowment Fund (for future outreach to the poor)

You can contribute to these funds or others at any time, in any amount, at catholic-foundation.org/give-now.

Ask us about an Endowment Fund beneficial your own parish — most parishes already have an Endowment Fund established at The Catholic Foundation. If not, we can help you set one up to benefit the future needs of your Catholic community.
It is with great pleasure and excitement that The Catholic Foundation announces formal planned giving partnerships with six area Catholic high schools. Bishop Hartley, Bishop Ready, Bishop Watterson, St. Francis DeSales, Notre Dame High School (Portsmouth) and Tuscarawas Central Catholic (New Philadelphia) all recently partnered with the Foundation in order to enhance current development efforts.

By definition, planned giving is a major gift that comes from the donor’s financial or estate planning. Gifts could come from appreciated securities or stock, real estate, a retirement plan or even cash – but they are generally made from outside of one’s discretionary income. Some donors are in a position to make the gift during their lifetime, but many make the gift as a bequest in their will. Planned gifts can offer many benefits to the donor, including tax benefits or the potential for returned income.

The Catholic Foundation will act as a resource to the schools, offering expertise in the areas of endowments, planned giving and bequests. This will allow the schools’ development teams to continue to focus on capital campaigns and annual giving, but enable alumni and other donors to consider future gifts and long-term planning for the school.

“The sustainability of our Catholic high schools rests with endowments that cover operations and tuition assistance,” said Loren Brown, President & CEO of The Catholic Foundation. “By offering the Foundation’s expertise to our schools, we are helping to secure firm financial grounding to ensure a Catholic education is available for future generations of students.”

Each partnering school is taking an individualized approach to a planned giving program with The Catholic Foundation in order to best fit the needs of their development team. Notre Dame H.S., for instance, is in a position to feature endowments in an upcoming letter to alumni, and Bishop Ready H.S. is ready to begin meeting with potential donors who are at the right time in their life to consider a bequest to the school.

The Catholic Foundation will offer behind-the-scenes expertise to all of the schools. For instance, the Foundation staff can assist with language and materials that promote planned giving, co-host information sessions with alumni, and even develop a page within Catholic-Foundation.org to promote and host online giving to the schools’ endowments. The Catholic Foundation will also administer the schools’ endowments. All funds at The Catholic Foundation are invested in alignment with Catholic beliefs and teachings, in accordance with the United States Conference of Catholic Bishops’ guide for Catholic Socially Responsible Investments.

The concept of a formal partnership originated when Scott Hartman, Director of Business & Advancement Operations at St. Francis DeSales H.S., and Tiffney Hatem, Director of Advancement at Bishop Hartley H.S., approached The Catholic Foundation about hosting a forum for the area Catholic high schools’ development teams.

“The forum allowed us to share best practices and ideas with our peers at other schools,” explained Tiffney Hatem. “It was a great way to collaborate and brainstorm strategies for reaching our audience.”

After the first forum, it became evident that there was an opportunity to approach alumni and other donors about including their treasured alma mater in their end-of-life giving.

“Our high schools generally focus on raising money for capital campaigns or promoting an annual fund – and we do that well,” said Scott Hartman. “However, we were missing an opportunity to plan ahead for future generations. By partnering with The Catholic Foundation, we are offering our alumni an additional way to remember their school – in this case, with a gift that will last for many generations to come.”

The Catholic Foundation is honored to partner with these six schools, and hopes to collaborate with other Diocesan schools to offer similar programs.

“The ultimate mission of The Catholic Foundation is to provide for the long-term needs of the Diocese of Columbus,” said Loren Brown. “We look forward to working with Bishop Hartley, Bishop Ready, Bishop Watterson, Notre Dame, St. Francis DeSales and Tuscarawas Central Catholic schools, and hopefully other schools, to help provide for their long-term needs as an organization in the diocese.”
For the second year in a row, The Catholic Foundation set a new record for impact. In the fiscal year ending on June 30, 2014, the Foundation distributed 1,070 grants totaling $6.5 million. The previous record was set in 2013, with nearly $6 million in grants distributed.

“We’ve been abundantly blessed by the gifts of our donors, which allows us to provide for the parishes, schools and ministries in the Diocese of Columbus,” Loren Brown, President & CEO said. “We hope to continue this upward trend for many years to come.”

Many of the over 1,000 grants were distributed based on donor intent. Of the grants awarded, 55% came from Endowment Fund distributions, 30% came from Donor Advised Funds and approximately 1% of grants were awarded in the form of scholarships. The remaining 14% came from the Foundation’s responsive grants programs.

“This year, we were able to invest more money into our Catholic ministries than ever before,” said Amy Parker, VP of Grants and Diocesan Partnerships. “It has been rewarding to see this investment in our faith, but we know that there is still much work to be done.”

About half of the 23 counties in the Diocese of Columbus have an unemployment rate higher than the state average, which increases demand on supporting organizations, and in turn, increases grant requests. While this was a record-breaking year, The Catholic Foundation staff and Board of Trustees continue to strive to provide for all requests for funding to support the Catholic faith.

“Through the support of our donors and parish pastors, and by the grace of God, we will move the dial closer and closer to fulfilling our mission of providing for the long-term needs of the diocese,” said Brown.
Last year, The Catholic Foundation received over $3.2 million in requests for funding from the parishes, schools, social service agencies and other ministries in the Diocese of Columbus. While they were able to provide at least partial funding to about 60% of the requests, there is still a large funding gap due to the limited availability of unrestricted funds.

The Catholic Foundation recently launched a new initiative to help bridge the funding gap for these organizations. The Bridge the Gap program offers crowd-sourced financial support to organizations that, due to limited available funds, saw grant requests go unfulfilled.

Bridge the Gap is a collaborative effort between The Catholic Foundation and an innovative donor, who was inspired to create a platform to showcase the many needs throughout the diocese. Hosted on Catholic-Foundation.org, it is a database of organizations that applied for grants, but received only partial or no funding. As part of the initial grants process, The Catholic Foundation vetted each organization to ensure their alignment with Catholic teachings and beliefs. Currently, over 300 requests for funding are listed on the site.

The Catholic Foundation encourages individuals and families to browse the projects shown on the website (catholic-foundation.org/needs) to find something meaningful to them. The database features a sorting capability to search within an interest area, based on the Foundation’s four pillars: Vocations, Social Services, Catholic Education and Parish Life. Each request displays a brief description, along with the amount requested and a percentage of the amount raised to-date. Users can then click the snapshot to read about the request in more detail. Contributions in any amount are greatly appreciated in order to help the organization move the dial closer to its goal.

“We’re trying to bring to light the many needs of the ministries in our diocese. Programs—great programs—often go completely unfunded or only partially funded because so many organizations need assistance and we have limited unrestricted funds available. We hope to inspire individuals to contribute to a program or project that speaks to them,” said Amy Parker, VP of Grants & Diocesan Partnerships for The Catholic Foundation.

Bridge the Gap was created to give these programs a second chance—the model is designed to allow each and every person to contribute to a great initiative, even if the amount seems insignificant at the time. Together, a collection of small gifts can make a huge difference to an organization seeking funding. Considering how many lives are positively affected by these organizations, even the seemingly most nominal of donations becomes truly tremendous.

“People sometimes underestimate the importance of giving, especially when they feel as though what they can give isn’t all that much. We’d encourage people to remember Mark chapter twelve, in which the poor widow gave but two small copper coins—an act for which Jesus praised her. No amount is insignificant in the eyes of The Lord,” said Loren Brown, President & CEO of The Catholic Foundation.

From supporting religious education to promoting faith and leadership, individuals can now easily make a real, positive, and lasting difference in the community. It is with all this in mind and heart that The Catholic Foundation encourages individuals to consider doing something great, by doing something small with great love. To browse over 300 requests for funding shown on the site, please visit catholic-foundation.org/needs.
4th Quarter Grants
April–June 2013

Total Grants
$4.8 mm

- Catholic Education (42%)
- Parish Life (25%)
- Social Service (17%)
- Vocation (16%)

BY SOURCE

Endowment Fund Distribution 68%
Donor Advised Funds 13%
The Challenge in Changing Times grants 12%
Other (Scholarships, Trusts, etc) 7%

2014 The Challenge in Changing Times Grants

The Catholic Foundation is pleased to announce the annual The Challenge in Changing Times grant recipients. This year, the Foundation awarded 54 grants, totaling over $580,000. Of the grants, 68% of the funds went to improving school or church facilities, 19% went to supporting human dignity and basic needs and 13% went to providing for faith formation and evangelization efforts.

Approximately 44% of the grant funding was awarded to parishes outside of Franklin County. For example, St. Mary of the Annunciacion Parish of Portsmouth received a grant to help fund their food pantry that serves 275-400 people each month. St. Mary Parish of Marion received a grant to help fund a two-week Hispanic Mission, with the goal of identifying the Hispanic Catholics in their community and connecting them to the life of the church.

In its 14-year history, 94% of the parishes who have applied for a grant from The Challenge in Changing Times received at least one. This year, two parishes received a grant for the first time: Church of the Ascension, Johnstown, and St. Ladislas, Columbus. The Church of the Ascension received a grant to help cover expenses related to repairs caused by a burst pipe in the church ceiling, while St. Ladislas Parish received a grant to help upgrade their security and communications system.

Applications for these grants are split into four categories: Assistance to Seniors, Capital for Parishes, Catholic Elementary School Assistance and Evangelization & Care for Poor. This year, The Challenge in Changing Times committee reviewed over 120 application requests totaling more than $2.8 million. Clearly, the need for financial support in the diocese is great, and The Catholic Foundation is unable to fulfill all requests due to limited funds available. To review the requests that were not funded, or only partially funded, please visit Bridge the Gap at catholic-foundation.org/needs. A donation to these initiatives, in any amount, is greatly appreciated.

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Andrew D. Walker, St. James Parish, Columbus

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<td>St. Patrick Parish</td>
<td>London</td>
<td>St. Vincent de Paul Society Care for the Poor</td>
<td>$2,000.00</td>
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<tr>
<td>St. Peter Parish</td>
<td>Chillicothe</td>
<td>Religious Sisters Serving our Community</td>
<td>$5,000.00</td>
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<tr>
<td>St. Pius X School</td>
<td>Reynoldsburg</td>
<td>Ventilator Motor Replacement</td>
<td>$18,900.00</td>
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<tr>
<td>St. Rose Parish</td>
<td>New Lexington</td>
<td>Payment of Utility Bills for Clients of St. Vincent de Paul</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>St. Thomas More Newman Center</td>
<td>Columbus</td>
<td>Buckeye Catholics Serve</td>
<td>$16,700.00</td>
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<tr>
<td>St. Timothy School</td>
<td>Columbus</td>
<td>School Safety Improvements</td>
<td>$11,100.00</td>
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<tr>
<td>St. Vincent de Paul School</td>
<td>Mount Vernon</td>
<td>School bathrooms’ renovation</td>
<td>$19,800.00</td>
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<tr>
<td>The Villas at St. Therese Assisted Living, Inc.</td>
<td>Columbus</td>
<td>Supplement resident rent</td>
<td>$18,720.00</td>
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</table>
Make a Charitable Bequest

Ellen and John are proud to be the graduating class of 1965 from a local Catholic High School. They sent their two children there, and remain active with the school even after their children have graduated several years ago. In fact, now that they are retired, they attend all of the high school football games—home and away—and they volunteer for lunch cafeteria duty.

When I met Ellen and John at The Catholic Foundation, they were among the 41% of people among their generation who do not have a will. They found out from an attorney friend that if they die without a will, the state will decide how to distribute their assets, regardless of their wishes.

However, Ellen and John naturally had specific desires for how they wanted to pass along their assets. They wanted to leave a portion of their assets to their children, but also wanted to support their high school. Specifically, they were interested in setting up an Endowment Fund to help financially sustain the school.

I explained to Ellen and John that an Endowment Fund is a permanent fund that would provide perpetual resources to the high school. I gave the example that a $100,000 endowment could potentially earn $175,000 in twenty years and give the high school a total of $116,000 during that time period, while continuing to provide for the school beyond that time.

Excited about leaving such a generous, everlasting gift to the high school, Ellen and John established the Endowment Fund, named it in honor of their parents, and also made provisions to fund the endowment in their will.

As a result of leaving a bequest to the fund through The Catholic Foundation, the Bishop inducted them into the Kyrie Bequest Society which recognizes individuals who leave the Foundation a future gift through a bequest, trust, life insurance policy, retirement plan, or charitable gift.

Now, Ellen and John have peace of mind that their wishes will be recognized through their estate planning and are satisfied knowing that they set up an everlasting gift that will benefit their beloved Catholic high school.

To learn more about making a charitable bequest to support your parish, Catholic school or Catholic charity, please give me a call at 614-443-8893.

God Bless,
James A. Anzelmo
Vice President of Development
**COMING UP**

**Calendar Events**

**Aug 28**
5:30 - 7:30 PM
Catholic Young Professionals networking event at The Catholic Foundation. We’ll have BBQ and Beer as we enjoy a brief performance by Catholic comedian Rob Wahl.
RSVP to Craig Heppner (CHeppner@catholic-foundation.org).

**Sep 3**
4:30 - 6:30 PM
Professional Advisors Group Quarterly Meeting
The Catholic Foundation, 257 E. Broad Street
Regular and Sustaining PAG members should RSVP to Trisha Buchanan (TBuchanan@catholic-foundation.org).

**Sep 9**
6 - 8 PM
St. Martha Giving Circle
The Catholic Foundation, 257 E. Broad Street
Attend an interactive panel discussion with representatives of organizations that help women.
RSVP to Betsy Sewell (bswell@catholic-foundation.org) by September 2. All women are encouraged to attend and consider joining the Marthas!

**Sep 16**
10 AM
Kyrie Bequest Society Mass & Luncheon
St. Therese Retreat Center, 5277 E. Broad Street
Honoring those who remember our Catholic faith in their estate plans.
To find out more about this beautiful society, please contact James Anzelmo (JAnzelmo@catholic-foundation.org).

**Nov 14**
John L. Sauter Estate Planning Seminar
The Boat House, 679 W. Spring Street
Save the date for this year’s estate planning seminar – details to come soon!
The Catholic Foundation celebrated its 4th Annual Dei Gratia Dinner and Award Ceremony. As in years past, it was a beautiful event attended by nearly 600 of our Catholic faithful. St. Mary, Marion, received the 2014 Dei Gratia Award for their parish commitment to future planning, and Keynote Speaker Matthew Kelly captivated the audience with a presentation based on his book, The Four Signs of a Dynamic Catholic.

“The church is not something we inherit from generations past. The church is on loan to us from future generations. What type of church will we deliver them?”

MATTHEW KELLY
AT THE 2014 DEI GRATIA CELEBRATION
In Christ, The Catholic Foundation inspires giving and assists donors to provide for the long-term needs of the Diocese of Columbus.

Blessings

257 East Broad Street
Columbus, OH 43215

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