

FOUNDATIONS

Building up the Catholic Community through Education & Communication

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Spring 2002

ARCHITECTS



Pattersons Establish Personal Family Fund

Doug and Micaela Patterson may own a land development and construction company, but they also specialize in building something else — a brighter future for the Catholic community. Longtime supporters of the Catholic Community Foundation, the Pattersons recently formed the “Doug and Micaela Patterson Personal Family Fund” through the Foundation.

According to Doug, “We donate money to the Catholic Community Foundation every year and then we choose which charities we want those funds to be applied to. It’s a yearly process.” Last year, the Pattersons made a significant contribution to St. Bernard of Clairvaux Catholic Church for its school construction fund. “They are trying to get a school program together and we’re trying to help them out with that,” he said.

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BUILDERS



Record \$438,000 in Grants Approved For Education and Communications in 2002-2003

The Most Reverend Thomas J. O’Brien, Bishop of Phoenix, and the Board of Directors of the Catholic Community Foundation-Diocese of Phoenix approved a record \$438,000 in grants for 2002-2003. Since 1983, grants for education and communications throughout the Diocese of Phoenix have totaled more than \$2,700,000. These grants are made possible through the generosity of donors who make unrestricted gifts to the Foundation. The earnings of these unrestricted assets are then used to support the education, communication and Christian formation objectives of the diocese.

According to Frank Brady, Grant Committee Chairman, “What we tried to do is focus on providing money to groups and organizations

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ARTISANS



Phyllis Anderson Honored with “2001 Spirit of Philanthropy Award”

The Catholic Community Foundation recently celebrated National Philanthropy Day by honoring Phyllis Anderson with the “2001 Spirit of Philanthropy Award.” The award was presented at the annual “Spirit of Philanthropy” dinner hosted by the Arizona Chapter of the Association of Fundraising Professionals at the Camelback Inn on November 13.

Anderson has been actively involved in the Diocese of Phoenix for more than 30 years, beginning in 1969 when she served on one of the first committees formed to establish the diocese. She was nominated for the award by John Scola, Executive Director of the Catholic Community Foundation and Don Ruff, Chairman, to recognize her contributions as an active board member, financial supporter and volunteer over the years.

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that would have the greatest outreach to the Catholic community. For education, we focused on giving grants to all the schools that asked for them, with an emphasis on the needier schools."

Grants for Communications are awarded to help promote the Gospel message. The following projects and programs will be funded through the Foundation:

- The televised *Catholic Mass* in English, which now airs on Sunday mornings at 6:30 a.m. on KPPX-TV on UHF Channel 51 and Cable Channel 17, provides liturgy to people who are ill and homebound. In addition, the Foundation will fund *closed captioning* of the Mass, which helps the hearing impaired understand the liturgy.
- An interactive web site operated by *Life Teen, Inc.* to provide teens across America with free email service, bi-weekly scripture email service, streaming videos of homilies and Catholic teachings, chat rooms and much more.
- Airtime and the production and distribution of printed materials and advertising for *Radio Family Rosary*.
- The continuation of radio spots and a toll free number which the *Hispanic Ministry, Diocese of Phoenix* will use to invite those seeking churches to become part of a local parish.
- The development of a video and accompanying study guide by *Virtue Media* that will help teach Jr. High and High School teens how to be more educated consumers of the media.
- The presentation of *pre-recorded pastoral messages* from the Most Reverend Thomas J. O'Brien, Bishop of Phoenix, on Spanish language television.

Education-Christian Formation Programs

are designed to address the diverse needs of the parish and can take many forms. They may include leadership training for parishioners, healing programs for divorced adults, natural family planning courses and bilingual counseling, to name a few. The Foundation has awarded grants for the following programs:

- *Disability Ministry Retreats* to provide training for people to minister to persons with disabilities.
- "Echo's of Faith" Ministry Formation for the distribution of a video program in English and Spanish.

- *Native American Ministry, Diocese of Phoenix*, to provide tuition for Native American future leadership development.
- *Phoenix Natural Family Planning*, to support the training of individuals to help with marriage preparation programs.

The Foundation will also provide grants for adult education in the communities listed below:

- All Saints Catholic Newman Center, Tempe
- Blessed Sacrament, Tolleson
- Holy Trinity Newman Center, Flagstaff
- Our Lady of Guadalupe Mission, Queen Creek
- Our Lady of the Lake, Lake Havasu City
- Sacred Heart Parish, Prescott
- San Francisco de Asis Parish, Flagstaff
- St. Charles Borromeo Parish, Peoria
- St. Francis of Assisi Parish, Bagdad
- St. Henry Parish, Buckeye
- St. Vincent de Paul Parish, Phoenix
- St. William Parish, Cashion

In continuation of the Foundation's strong commitment to **Catholic Education**, the following schools will receive grants for tuition assistance and other special needs:

PRESCHOOLS

- Blessed Sacrament Preschool
- Our Lady of the Lake Catholic Preschool
- Resurrection Preschool
- St. Timothy's Catholic Schools

ELEMENTARY SCHOOLS

- Christ the King
- Most Holy Trinity
- Our Lady of Perpetual Help, Glendale
- Pope John XXIII
- Queen of Peace
- Sacred Heart
- Ss. Simon & Jude
- St. Agnes
- St. Anne's Little Flower Montessori
- St. Catherine of Siena
- St. Daniel the Prophet
- St. Gregory



- St. Jerome
- St. John Bosco Interparish School

- St. John Vianney
- St. Louis the King
- St. Mary Basha
- St. Mary's, Flagstaff
- St. Matthew
- St. Peter Indian Mission School
- St. Vincent de Paul School

SECONDARY SCHOOLS

- Bourgade Catholic High School
- Brophy College Preparatory
- Notre Dame Preparatory
- Seton Catholic High School
- St. Mary's Catholic High School
- Xavier College Preparatory

The education grants will be used for a variety of purposes. At the St. Peter Mission School where 92% of the families are below poverty level, the funds will be used to upgrade textbooks and curricular materials. St. Daniel the Prophet School, in anticipation of a tuition increase for the 2002-2003 school year, will use its grant to help new families that request tuition assistance. Bourgade Catholic High School plans to use its grant for technology and to develop its fine arts programs. Grant monies received by St. Timothy's Preschool and Kindergarten will be used for tuition assistance and to fund the school's arts and science program.

Estate Planning and the Tax Reform Act of 2001



John A. Scola, CFRE
Executive Director
Catholic Community Foundation

It seems that nearly every day I am asked about the 2001 Tax Act passed by Congress and President Bush. Questions cover everything from the future of our nation to the way in which the new laws will affect our tax returns in the future. I have consulted with a number of specialists on tax law and account-

ing, and usually find these folks scratching their heads, wondering how all of this came to pass!

Yes, there have been significant changes in the tax code as a result of the Tax Reform Act of 2001. Yes, these changes will have impact over the next 10 years, unless Congress changes its course. Yes, these changes will dramatically impact the methods and practices of estate planning.

Rather than address the age-old debate about whether change is good, I can tell you that in this

case, change certainly is good. As a result of the new tax code, the manner in which you and other supporters of our ministry can make gifts through your estate plan will be simplified. Not only will you be able to continue to provide for your loved ones through careful planning, but your ability to create a legacy through the Catholic Community Foundation will be easier than ever.

As John Even, a local estate planning attorney and member of the Foundation's estate planning committee, told us, "While changes to the estate tax laws under the 2001 Tax Act may affect charitable giving in general, the true impact goes straight to the heart of the giver. From my experience, Catholics who give to the Catholic Community Foundation, to the annual Bishop's Charity and Development Appeal, to their parish, or to other charitable organizations are not only motivated by the tax consequences of their giving. They are motivated by Jesus' call to live the gospel in their lives. If this is the true motivation of most Catholics, then the 2001 Tax Act will have little or no impact on their charitable giving."

While the tax laws may have been revised, one

thing has not changed. The Foundation continues to encourage you to seek the advice and counsel of qualified professionals in the field of estate planning. No two people can have the exact same estate plan, and what works for one family may or may not work for another. Only a careful review of your specific situation by a qualified professional will yield the results you need.

There are many people who offer these services, and only you can determine who the best advisor is for you. I urge you to treat anyone in a position to advise you on your estate plan the same way that you would treat someone applying to you for a job. Ask lots of questions about their credentials and qualifications. Ask yourself if you would enjoy working with them. Ask yourself if you respect this person. Ask yourself if they will be able to understand and appreciate the values you have in your life, and can assist in developing an estate plan to convey those values.

I ask you to join me in welcoming the changes to the tax code, and feel free to call on your Catholic Community Foundation if we can be of service to you.

Grammy Award-Winner Doc Severinsen to Headline 2002 Bishop's Crozier Dinner



Grammy Award Winner Doc Severinsen headlines at The Bishop's Crozier Dinner

Plans are well underway for the 14th Annual Bishop's Crozier Dinner, which is scheduled to take place on Saturday, April 6 at Marriott's Camelback Inn in Paradise Valley. Billed as "An Evening with Doc Severinsen," the event will feature entertainment by the Grammy Award-winning trumpeter and band leader best known to television audiences as the flamboyant Music Director of "The Tonight Show with Johnny Carson." Since leaving the Tonight Show, Severinsen has continued to perform his special brand of jazz and big band tunes with the best of that show's musicians — Ed Shaughnessy on drums, and Snooky Young and Conte Candoli on trumpets. Together, they tour the country as Doc Severinsen and His Big Band. The versatile performer has also served as the Principal Pops Conductor of the Minnesota Orchestra, the Milwaukee Symphony, the Buffalo Philharmonic and the Phoenix Symphony. His performances are consistently sold out.

The Bishop's Crozier Dinner was established in 1989 to provide an important fundraising vehicle for the Catholic Community Foundation. According to Carolyn Rock, who is Co-Chairing this year's event with Linda Williams, "Our goal is to promote the

Foundation to a variety of people and make them aware of the many charities supported by the Catholic Community Foundation. The Foundation provides financial aid for thousands of students in Catholic schools, the televised Mass seen by approximately 25,000 homebound people and many other organizations involved in communication and Christian formation." The Master of Ceremonies for this year's dinner will be Jeff Munn, voice of the Phoenix Suns and Arizona Diamondbacks.

Rock and Williams head up a committee of more than 40 volunteers who each play a key role in making the event a success. "The people on our committee are so wonderful to work with, and they really know how to do their jobs," Williams commented. "Carolyn and I are managing their efforts, but they really deserve the credit."

Last year's dinner raised more than \$320,000 and was attended by over 900 guests, making it a sell-out event. Rock and Williams are looking forward to achieving similar results for this year's dinner. Rock explained, "There are a variety of underwriting opportunities and there are different levels of tables available. The important thing for people to know is that all of the proceeds from the dinner go back to the charities that the Foundation supports for education, communication and Christian formation." Williams added, "Through this event, we can help make it possible for adults and children to receive an education that includes the values that our Church teaches. My children have all benefited from a Catholic education. I've seen the difference that it makes and I feel that it is important for us to offer that to children who might not otherwise be able to afford it."



Co-Chairs Carolyn Rock and Linda Williams at last year's Bishop's Crozier Dinner

"We want people to know the good that they can do by contributing and attending the dinner," Rock summarized. "Thousands of students attend Catholic schools and there are many charities that we support. The dinner impacts many, many lives."

Reservations for the 14th Annual Bishop's Crozier Dinner can be made by calling the Catholic Community Foundation at (602) 257-5642. Ticket information will also be posted on the Foundation's web site at www.ccfphx.org.

Carolyn Rock is the Director of Development at Notre Dame Preparatory, the new Diocesan high school located in north Scottsdale. She also serves on the Catholic Community Foundation Board of Directors. Carolyn is married to Dr. Michael and they have four children, all of whom have attended Catholic schools.

Linda Williams is the owner of an independent technical and management consulting company. She has a daughter who attends Our Lady of Perpetual Help School in Scottsdale and two sons who attended Brophy College Preparatory

Success of "Million Dollar Parish Match" Inspires Program for Catholic Schools



In 2001, the Board of Directors of the Catholic Community Foundation – Diocese of Phoenix approved a program designed to provide "seed money" to help parishes establish their own endowment funds. The program, which became known as the "Million Dollar Parish Match," made it possible for 74 parishes throughout the diocese to set up new endowment funds within the Catholic Community Foundation.

The success of this program, coupled with the fact that most of the diocesan Catholic schools had already expressed an interest in establishing an endowment account, seemed to indicate that a similar "match" program for Catholic schools would be well received. As a result, the Board of Directors of the Catholic Community Foundation approved the Catholic School Match Program in 2001 and set aside \$538,000 to fund the program. These funds will make it possible for each school to establish an

endowment fund, the earnings of which can be used at the school's discretion. To set up the endowment, preschools can receive \$2,000 outright plus up to \$2,000 in additional matching funds. Elementary schools can receive \$5,000 with up to \$5,000 matched, and diocesan high schools and Brophy College Preparatory can receive \$20,000 outright plus up to \$20,000 in matching funds.

Greg Donahue is the Chairman of the Catholic Schools Match Program. He explained, "The school match program is important because it has a long lasting effect. The dollars that we raise today will support not only the present, but also the future. With an endowment, you're building the principal and utilizing the earnings. Most big schools, the Harvards, the Stanfords...all the major colleges use endowments to perpetuate their schools. If our Catholic schools are going to handle the peaks and valleys of economic times, we're going to need to have some of that strength, as well. Future generations will see the benefit."

Donahue added, "One of the great opportunities the Catholic School Match Program offers is the flexibility of the individual school to make the decision about how to use the funds. I think that's important. Brand new schools like Pope John XXIII or St. John Bosco have different expense needs than older schools may have."

Seton High School is one of the many schools planning to take advantage of the match program. The school is currently planning a \$15 million capital campaign, \$1 million of which will be set aside for an endowment. According to Shelley Conner, Seton's Development Director, "The endowment fund will allow us to plan a little better for the future...to have a source of income that is never ending. When we look at the structure of our staff, we no longer have the religious who were kind of a living endowment with their commitment of time over many years. We really need to provide for the teachers who are here now, but also be able to look to the future so that we have a never ending source of income."

Factors such as the growing demand for Catholic schools, increased operating costs and the gradual elimination of traditional subsidies such as multi-child discounts, also makes the approval of the program particularly timely. "We're planning that the revenue from the endowment will help with operating support," said Conner. "It can go for teachers...it can go toward paying the light bill...things that the school has to do in order to function."

"Fundraising is always going to be a need," Donahue concluded. "Maybe 100 years from now, all of the schools will have significant endowments that will make their operations run a little smoother."

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At the same time, the Pattersons also made a donation to the St. Jude Children's Research Hospital.

For the current year, the Pattersons were once again in search of a worthy cause, and they chose the Christian Service Scholarship program. The scholarships are awarded to deserving eighth grade students who plan to attend a local Catholic High School. Doug said, "We talked to John Scola and he really convinced us that this was worthwhile and that we could really help these youngsters. That's our main purpose. We want to help some youngster get through school with a Catholic education."

Doug and Micaela Patterson are the owners of Patterson Development. They live in Scottsdale where they are members of the St. Bernard of Clairvaux parish.



Announcements of the 2002 Christian Service Scholars will be in April 2002. Applications will become available the first Monday after Labor Day, (September 2002) for the 2003 Scholarships. The application process will include the completion of the application; recommendations from the pastor or parish representative, community service supervisor and teacher; and a typed essay of no more than 500 words.

Funding for the Christian Service Scholarship program is made possible thanks to the generosity of many contributors who have established perpetual funds through the Catholic Community Foundation. To find out how you can become a part of this legacy, contact the Foundation today at 602.257.5642.

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According to Ruff, "She's a great lady. Both Phyllis and her late husband M.L. "Andy" were longtime supporters of the diocese. She was a board member of the Catholic Community Foundation for many years and continues to serve on our advisory board. In addition, she set up a sizable donor-advised fund with the foundation and is instrumental in funding scholarships for deserving eighth grade students who wish to attend a local Catholic high school."

Along with the Philip J. Poirier and other Family Fund scholarships, Anderson's awards will be given to students who have demonstrated a strong com-

mitment to their faith. She hopes that some of her scholarships will also benefit students who have not had the opportunity to attend a Catholic elementary school.

Anderson explained, "I established the scholarship fund because Catholic education is so important and the future of our Church is with our youth. We need to help them along." She added, "I've been dedicated to the Church and our faith all my life. We're so lucky to have it. I feel a need to share that with our young people."

Phyllis Anderson is a retired past president of Anderson & Berke Beverage Company, Inc. and the past legislative chairman of the Arizona Wholesale Beer and Liquor Association. Phyllis received her R.N. degree from Misericordia Hospital School of Nursing in Milwaukee, Wisconsin. She is currently a Councilor of the Western Lieutenancy of the Equestrian Order of the Holy Sepulchre of Jerusalem for the Diocese of Phoenix. She has also served as a member of the U.S. Catholic Bishops National Advisory Council; is a former member and Secretary of the Arizona Catholic Conference for twenty years; and has served as President of the Phoenix Diocesan Council of Catholic Women for four years. Phyllis received the Diocese of Phoenix Ministry Award in 1994. She has one son, Thomas (who serves on the volunteer Marketing Committee for the Foundation), and four grandchildren.

ARTISANS

New Staff Member Brings Extensive Experience

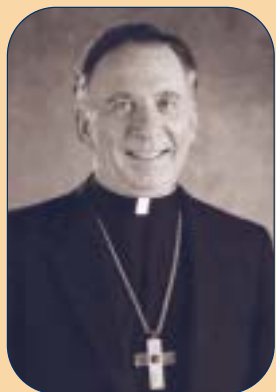
Thomas L. Thieken recently joined the Foundation Staff as Senior Field Representative. Tom has over 30 years experience in the philanthropic community, and brings valuable expertise in charitable gifting techniques to the Foundation. He has a Bachelor of Science Degree from John Carroll University.

Tom looks forward to being part of a team that believes in a mission and then works together to accomplish that mission. He is excited about planning and building relationships with individuals who are interested in philanthropy, presenting options for them that match their financial plans, and then providing good stewardship for them. Tom and his wife Kathy have relocated from

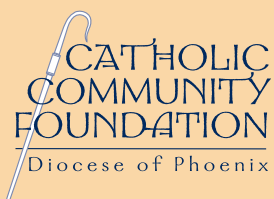
Indiana, where Kathy was an employee of the Archdiocese of Indianapolis. Tom and Kathy have two grown sons and are members of Blessed Sacrament Parish in Scottsdale.



Thomas L. Thieken



Most Rev. Thomas J. O'Brien, Bishop of Phoenix



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