

# CATHOLIC COMMUNITY FOUNDATION

## *A Letter From Deacon James*

CHIEF EXECUTIVE OFFICER  
CATHOLIC COMMUNITY FOUNDATION

"Go, therefore, and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, teaching them to observe all that I have commanded you."

Many of us are familiar with this Gospel passage from Matthew where Jesus appears to His disciples in Galilee after His Resurrection. And what is clear in this reading, "making disciples" is a matter of bringing the "lost" to salvation in Jesus Christ and helping them understand and obey His teachings. We know our call.

And how many times have we heard this statement, "Things just aren't what they used to be." We reminisce as to how life in the Church was and compare it to what life is all about now. Undoubtedly, generations of people have been doing the same. Many of us rightfully feel this concern. The idea of believing in God the Creator seems out of date. People now describe themselves as "spiritual," not religious. Where there is no true affiliation with the faith they were raised.

But that is okay! The call to make disciples of all nations is an outright challenge for us. We work to build the Kingdom by using our resources to continue to share the Good News as we disciples are called. We can only imagine how difficult this activity has been over the thousands of years of discipleship. Social media was non-existent until recently. Without technology, Catholic-Christians over the years accepted the challenge of sharing our Faith through instruction and example.

Thankfully, we at the Foundation are equipped to take on this task - to help ensure the teachings of the Catholic Faith are passed on from generation to generation through the financial support from you, our community of donors. We continue to monitor giving trends both in the Diocese of Phoenix and nationwide, recognizing a significant reliance on contributions from the faithful aged 68-80, who are a major part of our donor base in the Diocese. This prompts us to reflect on whether the next generation will fill those shoes, or if we face a deeper issue. The economic strain of inflation and changing attitudes towards faith are pressing concerns.



Giving Circle Pitch Day  
January 18, 2024 at Mt. Clare Retreat Center

Our Giving Circle heard "pitches" from 23 organizations about their unique funding needs and missions to serve our communities.

There are two factors that make our call to discipleship different: 1) a decline of faith across our country, and 2) the increased costs of living amongst younger generations. These equally contribute to an uncertain future for our vital ministries, both here in the Diocese and in our nation. Trends in the Catholic Church continue to point to a decreasing number of baptisms, confirmations, and marriages.

**Without replacement of the faithful within our parishes, the concern is that this will continue to create uncertainty amongst our ministries and their ability to garner future support to provide the critical ministries we enjoy today.**

This is not gloom and doom. This is the environment we will face in the future. However, with all the issues we face, there is always hope. This is one of the primary purposes the Foundation exists to secure the future of these critical ministries through end-of-life planning amongst our most faithful supporters, while beginning the education of endowments and their value in securing against the biggest area of concern: uncertainty.

The immediate need is always present. Jesus Himself said the "poor will always be with us." But this new challenge of financially sustaining our Faith has a future focus that will help offset the financial pressure of meeting the immediate need.

The Catholic Community Foundation has been focused on this reality for over 40 years. Will you help by answering the call to make "disciples of all nations"?

Reach out to the Foundation. We can share with you how. We are here to serve.

God bless you,  
Deacon James Carabajal



# TAX-SMART GIVING

## Donor Advised Funds

In the realm of charitable giving, finding tax-efficient methods that align with our values is crucial. Donor-Advised Funds (DAFs) offer a powerful solution, allowing donors to make charitable contributions, receive immediate tax benefits, and recommend grants from the fund over time. However, for the Catholic community, the choice of DAF provider is of paramount importance, as secular providers may invest in companies or support causes that conflict with Catholic values. This is where our authentically Catholic Donor-Advised Funds distinguishes itself, ensuring that all investments and grants are consistent with our faith's teachings on the sanctity of life and other moral principles.

### Why Use a Donor-Advised Fund?

DAFs serve as a strategic vehicle for philanthropy, offering several benefits:

- Tax Efficiency: Donors receive immediate tax deductions in the year they contribute to their DAF, with the ability to spread out grants to charities over multiple years. A key strategy called "cluster giving" allows for one of the best tax planning opportunities.
- Flexibility: DAFs allow donors to recommend grants to their favorite charities at their convenience, without the administrative burdens of direct giving (i.e., anonymity, multiple charitable receipts, tracking of donation status, etc.).
- Legacy planning: A DAF can be a tool for families to plan their philanthropic legacy, involving multiple generations in the decision-making process.

### The Catholic Difference

Catholic Donor-Advised Funds ensure that your charitable giving aligns with your values in two crucial ways:

- 1) Investments: Unlike secular funds, Catholic DAFs invest solely in entities that adhere to Catholic moral and social teachings, avoiding companies that support practices contrary to our faith, such as, but not limited to, stem cell research, gender issues, and utilizing forced or child labor.
- 2) Grant Recommendations: Catholic DAFs scrutinize grant recommendations to ensure they support causes consistent with Catholic values, reducing the risk of inadvertently supporting activities that undermine our beliefs.

**Contact a member of our team  
at 480-651-8803 to learn more!**

# END-OF-LIFE GIVING

## Perpetual Light Society

On Thursday, November 30, on the Feast of St. Andrew, the Catholic Community Foundation hosted its annual Perpetual Light Society event at the peaceful and serene Mt. Claret Retreat Center.

Perpetual Light Society Members joined together for a beautiful evening filled with fellowship and community – breaking bread together at Mass and dinner. We honored the life and legacy of three Members: Msgr. Richard Moyer, John Q. Adams, and Anthony "Tony" V. Ehmann.



Bishop Dolan gives a special blessing of candles.

In his homily, he reminded us of our call to cast out our nets in our "seas" of community to be fishers of men.

The Perpetual Light Society serves to promote Catholic philanthropy by recognizing those who have created an everlasting legacy by making an end-of-life-gift directly to a ministry, parish, or school within our community through their estate plan.

**"Giving gifts while we're alive is valuable and needed. But we also have to provide for the long-term future. And I think that's what the Catholic Community Foundation is particularly suited to do."**

**MIKE GEDDES**

**Lifetime Member | Board of Directors  
Perpetual Light Society Member**

If you have thought about leaving your parish or favorite ministry in your estate plan, contact a member of our team at 480-651-8803.

Learn more:

[ccfphx.org/perpetual-light-society](https://ccfphx.org/perpetual-light-society)





# DRIVING GROWTH THROUGH ENDOWMENT DRIVES

In a year marked by unparalleled generosity and community spirit, the Catholic Community Foundation is proud to report a record-breaking series of 11 endowment drives throughout fiscal year 2024. These drives, the cornerstone of its mission to steward the future of its faith, represent not just a fundraising milestone but a profound deepening of the communal understanding and commitment to the enduring legacy of the Church.

Endowment drives, integral to the vitality and sustainability of parishes, schools, and ministries, offer a focused period, often one month, for communities to gather financial support for their endowment. This year, for the first time in its 40-year history, the Foundation witnessed an unprecedented engagement across its communities, underscoring the vibrant spirit of giving and education that defines it.

With the Foundation providing matching funds, these initiatives extend beyond mere fundraising; they are a call to the shared duty to safeguard the future of the Faith. Through a comprehensive suite of resources including educational videos, messaging, pulpit announcements, and a particularly stirring homily from CEO Deacon James, the critical importance of endowments have been illuminated.

Among the highlights of this year's drives, St. Timothy Catholic Church completed its fourth endowment drive, a testament to the growing awareness and appreciation of endowment's role within the community. Darren Handy, Director of Stewardship at St. Timothy, shared, **"We were surprised to learn that after 30 years, not many parishioners had contributed to St. Timothy Endowment Fund. More importantly, was the widespread lack of awareness among parishioners regarding the pivotal role an endowment plays in sustaining our parish mission and its enduring impact on future generations. The Catholic Community Foundation's endowment drive initiative has been instrumental in educating our parishioners, boosting our Endowments, and significantly enhancing St. Timothy's financial security for the future."**



All Saints Catholic Church  
kicked off its first Endowment Drive  
in March and April.

The parish reached its match goal  
of \$50,000 to enhance  
youth faith formation.

- 11 endowment drives during 2024
- 450 donors for all endowment drives in 2024
- \$300,000 raised during 2024
- \$90,000 matched during 2024

This year's success is not only a reflection of the Foundation's commitment to fostering a culture of philanthropy but also a clear indication of its community's desire to perpetuate the teachings and values of the Faith. Endowments are not just financial tools; they are beacons of hope, ensuring that the light of the Church shines bright for future generations.

As we look to the horizon, we invite all parishes, schools, and ministries interested in harnessing this momentum to consider hosting an endowment drive. With the Foundation's continued promise of matching funds, each contribution is a step towards securing a resilient and thriving future for faith communities.

***For more information on initiating an endowment drive within your community, reach out to a member of our team at 480-651-8803. Together, let's continue to sow the seeds of faith, stewardship, and community for years to come.***



-2024-

# *Crozier Gala*

## *Building Upon Rock*

The Crozier Gala is the preeminent Catholic celebration event in Arizona.

Since 1989, proceeds from the gala support the Catholic community within the Diocese of Phoenix through Forever Funds focused on ministries and nonprofits serving those in Community, Life, Care, and Education.

Today, the strength of the Diocese rests upon its foundation of 94 parishes, 41 Catholic schools, and significant missions and organizations that serve our greater community and a diverse and expanding Catholic populace of over 1.7 million.

*This year, for our 40th anniversary, we are celebrating Community.*

*Join us for this elegant evening!*

**Saturday, October 26, 2024 | 6 PM**

**Arizona Biltmore**





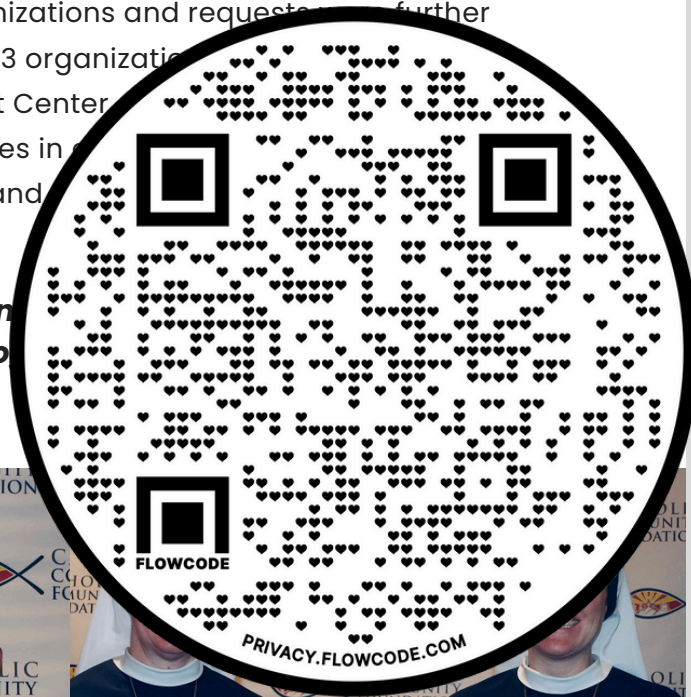
# \$142,323 AWARDED IN GRANTS TO NINE LOCAL ORGS



On Tuesday, February 20, the Catholic Community Foundation Giving Circle granted out a total of \$144,323 to nine organizations that serve local communities throughout Arizona. Our annual Giving Circle Awards Day Ceremony was held at St. Francis Xavier Parish in Phoenix.

In November of 2023, we received grant applications from 55 organizations. These organizations and requests were further evaluated by our team, and 23 organizations presented at Pitch Day at Mt. Claret Retreat Center. The community voted for their top three pitches in the categories of Community (+ Music), Care, and...

**Become a Giving Circle Member or learn more about the program**



**Catholic Community Foundation  
Awards FSL \$13,000 for Music Therapy**

Lindsay Hansen - 04/08/2024



**Our Lady of the Lake  
Parish Soup Kitchen**

**\$25,000**



**St. Timothy  
Daycare & Preschool**

**\$20,436**



**Foundation for Senior Living**

**\$13,000**



**Mt. Claret Retreat Center**

**\$13,000**



**St. Benedict Catholic Church**

**\$10,000**



**Amanda Hope  
Rainbow Angels**

**\$25,000**



**Saving Amy**

**\$14,387.28**



**WWMIN St. Mary's  
Roman Catholic Parish**

**\$1,500**

**SISTERS OF LIFE**

**Sisters of Life**

**\$20,000**





4500 South Lakeshore Drive, Ste 650  
Tempe, AZ 85282  
480-651-8800 | ccfphx.org

## Board of Directors

+ Bishop John Dolan  
Kevin Camberg | *Chairman*  
Gary Naquin | *Vice Chairman*  
Kevin Boudreau | *Treasurer*  
Brett Johnson | *Secretary*  
Reverend John Muir | *Vicar General*  
Karen Abraham | *Immediate Past Chair*  
Steve Jerome | *Ex officio*

Cathy Bergmann  
Reverend John BonavitaCola  
Chris Campisano  
Janine Campo  
Maria Chavira | *Chancellor, Ex officio*  
Ann Couch  
Deb Frere

Mike Geddes | *Lifetime Member*  
Sister Mary Jordan Hoover  
Reverend Matt Lowry  
Dr. Connie Mariano  
Lisa Reilly-Payton  
Cynthia Scheller  
Steve Strickbine  
Tony Tanner

## Staff Members

Deacon James Carabajal  
*Chief Executive Officer*

Kyle Felix  
*Chief Operating Officer*

Tyler Greuel  
*Senior Financial Analyst*

Jacob Loel  
*Philanthropic Advisor*

Courtney Martinez  
*Programs & Events  
Coordinator*

Jess Meeth  
*Marketing & Communications  
Coordinator*

Jazzmin Wilson  
*Administrative Assistant*

## UPCOMING EVENTS

**Scholarship Award Ceremony**  
Saturday, August 3, 2024

**34th Annual Crozier Gala**  
Saturday, October 26, 2024  
Arizona Biltmore

**Perpetual Light Society Event**  
Thursday, November 21, 2024

### PHILANTHROPIC TOOLS

Legacy planning  
Estate planning  
Family, memorial,  
& nonprofit endowments  
Savings & investment tools  
Donor advised funds  
Charitable gift annuities  
IRA charitable rollover

### PROGRAMS & EVENTS

Wills & Trusts  
Get Your Affairs In Order  
Perpetual Light Society  
Crozier Gala  
Giving Circle  
Scholarships  
Shop For A Cause

### WAYS TO LEARN MORE & GIVE



Send a check or money order to:  
**Catholic Community Foundation**  
4500 South Lakeshore Drive, Ste 650  
Tempe, Arizona 85282



Scan this QR code  
or visit **ccfphx.org**





CATHOLIC  
COMMUNITY FOUNDATION