



CATHOLIC
FOUNDATION
OF SOUTH LOUISIANA

2018
**ANNUAL
REPORT**



Message from **Bishop Fabre**

My Sisters and Brothers in Christ,

As I think back to all that the Lord has blessed us with in 2018, my heart is filled with great joy and love. I am simply inspired by the faith-filled people of our diocese who have given so generously of themselves through our Foundation. It is through love for our people and our church that our donors created lasting legacies that impact the lives of others today and deep into our future.

Over the last five years as the bishop of the Diocese of Houma-Thibodaux, we have witnessed great blessings. We have also worked diligently to strengthen our parishes and schools through our diocesan strategic plans of hope and we continue to see the fruits abundantly bless our diocese. While we have been tremendously blessed, our diocese has also faced times of darkness. However, it is the deep-rooted faith of our people and the rich tradition of our Catholic Church that guides us to a future full of hope, love and joy.

With the diocese's rich history, it is important for us to look into the future to create a lasting legacy to preserve our faith. In order to preserve our legacy, we at the Catholic Foundation are called to serve our people to walk them through their journey of creating a legacy that celebrates our families, our community and our faith.

The future of our parishes, schools and diocese is in our hands. Let us trust in the Lord's love so that we might answer our calling for what lies ahead. I pray that our Catholic Foundation Annual Report gives you a glimpse of the Lord's great work over the last year and inspires you to join us as we build a legacy for our future.

With gratitude for your prayers and generosity, please be assured of my continued prayers for you.

Blessings to you in the Lord,

MOST REVEREND SHELTON J. FABRE

BISHOP OF THE DIOCESE OF HOUMA-THIBODAU

Message from the **Executive Director & Chairman of the Board**

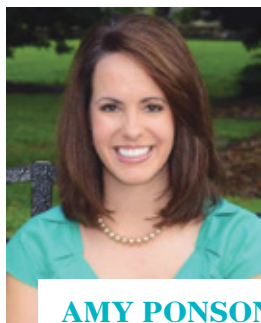
On behalf of the Board of Directors and the staff at the Catholic Foundation, we would like to thank all of our loving donors for your confidence in the Catholic Foundation. Over the last year, our Foundation has grown leaps and bounds focusing on supporting our church parishes, Catholic schools, ministries and our local community. As a Catholic community foundation, we are committed to ensuring the long-term financial stability of our many nonprofits and are pleased to work with so many community members in creating their lasting legacy.

Our Foundation is here to work with donors on their philanthropic giving of today and creating lasting legacies that support the church for years to come. We are proud to work with donors, like you, to develop plans for your charitable legacies. Many of you have created endowed funds that will support organizations and causes that are important to them, in perpetuity. Please take this opportunity to learn about the programs we have launched this past year and peek into what lies ahead for our foundation.

Giving through the Catholic Foundation not only benefits donors' favorite charities, but it increases their community impact. Collectively, with the generosity of our entire community as one, we can make a greater impact in our community today and provide resources for the future. It is our hope that we can be your trusted advisor in helping guide you through the process and assisting you in establishing your charitable legacy. Thank you for your continued support.

Wishing you peace and all God's blessings!

Sincerely,



AMY PONSON

EXECUTIVE DIRECTOR



CHARLOTTE BOLLINGER

CHAIRMAN OF THE BOARD



How We Serve

Catholic donors partner with our foundation to share their blessings in support of the church parishes, schools and ministries in our diocese and local community. Through our partnership, we share our philanthropic expertise, investing focused on Catholic social teaching, while connecting the needs of our community with the passions of our donors.

Our Mission

The Catholic Foundation of South Louisiana is a community foundation established to promote philanthropy, empower priests, inspire our community, and ensure long-term financial stability for the charitable, educational, and spiritual ministries of the Diocese of Houma-Thibodaux.



Impacting Lives

Our community has graciously supported the Catholic Foundation for many years through the Capital Campaign as well as through endowments for our church parishes, schools and diocesan ministries. As these endowments continue to grow, the foundation is able to support these ministries and their great work year after year.

In July of 2018, Bishop Shelton Fabre and the Catholic Foundation of South Louisiana Board of Directors made distributions from established endowments within the Foundation. Of these annual distributions, Catholic Charities received **\$62,114**, the diocese received **\$155,307** for seminarian education and Vandebilt Catholic High School received **\$8,630** for a variety of needs. These endowments have been invested and managed by the Catholic Foundation with the intent to make an annual distribution to each beneficiary ensuring consistent annual support of their mission.

"From adoptions, the Foster Grandparent program, and from parish social ministry outreach to our three Good Samaritan Food Banks, Catholic Charities provides compassionate service and empowers families to weather crises and improve their lives through one of our 13 programs. The Catholic Charities Endowment is critical to our ability to offer these programs. CFSL donors partner with us in making a difference in people's lives."

- Rob Gorman

Executive Director of Catholic Charities of the Diocese of Houma-Thibodaux.





Profiles

Creating a Lasting Legacy

Maurice E. Adams was a quiet, simple man who worked hard and loved to hunt and fish — just an ordinary guy who was very passionate about his community. He was well respected across the community but especially within the Thibodaux Fire Company, where he was a training director.

Maurice wanted to give back to the community all that the Lord had blessed him with during his life. Although he did not have any children of his own, he had many nieces and nephews. He watched them grow up with a strong Catholic education — something he wanted to help other children receive. But he also understood that tuition can be costly.

So Maurice worked with his attorney to ensure that his legacy of supporting his community continued to live on after he was gone. Through his will, Maurice established a scholarship named after his mother, Juliette Martinez Adams. This scholarship will provide tuition assistance to Edward Douglas White Catholic High School students who demonstrate good moral character, show financial need and maintain a 3.0 GPA (or 2.5 in cases of extreme need).

The Catholic Foundation is proud to facilitate and manage these endowed scholarship funds for E.D. White Catholic High School. We look forward to supporting the families of the school for years to come.

#iGiveCatholic

The 2018 #iGiveCatholic campaign exceeded our expectations, proving that our diocese is rich with immense generosity. More than 1,330 donors in our community gave Catholic on #GivingTuesday, and YOUR prayers and gifts made a huge impact on our church parishes, schools and ministries, raising over \$350,000. Your support has helped our ministries replace leaking roofs, build new adoration chapels and much more.

Strengthening the Faith of Our People

#ColonelCatholics

St. Thomas Aquinas and the Colonel Catholics are so thankful to have partnered with the Catholic Foundation of South Louisiana for this past year's #iGiveCatholic campaign. #iGiveCatholic provided our church parish the platform to maximize giving and engage our entire community through their prayers and gifts to help us build our new Adoration Chapel at St. Thomas Aquinas.

By engaging our students at Nicholls State University, we were able to get creative with our messaging and engage our students through the #NichollsChapelChallenge. The generosity of over 200 donors in just a 24 hour period helped our parish raise the funds needed to build our new Adoration Chapel with the goal to break ground in early spring of 2019. A BIG thanks to our community for helping our parish enrich our faith through our Adoration Chapel.



"Thank y'all so much! Because of your generosity, we get to build our perpetual Adoration Chapel."

- Rev. Mitch Semar

Stewardship

Creating a Culture of Stewardship Across our Diocese

2018 brought about new programs and initiatives which the Catholic Foundation offered to our parishes, schools and ministries across our diocese. In the fall of 2018, the Catholic Foundation hosted several stewardship trainings for our pastors, parish staff and volunteers. The Foundation leads these stewardship efforts to help parishes identify their overall parish development needs and works hands-on with each parish to cultivate a culture of strong prayer, ministry and finance. The Foundation offers programs, tools and resources that help parishes build capacity, inspire the involvement of the community and help to form a culture of generosity.

St. Hilary of Poitiers was the first to embrace stewardship programs through the Catholic Foundation. Fr. P.J. was aware of his parishioners' desire to give evidence of becoming missionary disciples, challenging them to reawaken their sense of sharing through prayer, ministry and financial support.

The Foundation looks forward to enhancing our stewardship programs and continuing to support our parishes in the upcoming years.



"The St. Hilary community is strong in their faith and rich with families willing to give back in ways that are unique to their passions. When I learned about the stewardship resources available with the Catholic Foundation, we invited several other parishes to come and learn more here at St. Hilary. Our parish embraced the stewardship resources and embarked on a stewardship campaign in the fall of 2018 which supported our parish beyond our expectations."

- Fr. P.J. Madden



*Catholic Foundation has funneled over **\$2 million** in gifts into the community over the last year to many nonprofits and ministries.*

Inaugural Dinner

The Catholic Foundation hosted its Annual Dinner in the fall of 2018 with over 200 people in attendance and our diocesan seminarians as guest waiters. Over \$39,000 was raised to support our seminarian endowed fund and the Catholic Charities endowed fund. Each year these endowments support the education of diocesan seminarians and the great work that Catholic Charities do within our communities.

During the dinner, Bishop Fabre recognized recipients of our inaugural Faith in Action Award, Matthew 25 Catholic Charities Award and the Seminarian Champion Award. These individuals are laypersons who model Christian stewardship and have an outstanding record of volunteer service, high moral character and exemplary values. The bishop's Faith in Action Award recipient was awarded to Mr. Charles "Mike" Callais. The Matthew 25 Award was awarded to the Danos Family in memory of Mr. Allen J. Danos, and the Seminarian Champion Award was awarded to Dr. James "Jimmie" Peltier.



A Look Into
Our Future





"We have prayed for vocations, and the Lord has answered our prayers abundantly."

- Bishop Shelton Fabre

Seminarian Endowment Challenge

The Catholic Foundation of South Louisiana received \$50,000 in seminarian challenge funds from Catholic Extension. Catholic Extension is a nonprofit dedicated to building churches and supporting the ministries in the Catholic Church in dioceses that are underserved, including the Diocese of Houma-Thibodaux. In an effort to grow our Foundation's endowed funds and support the growing number of seminarians in our diocese, the Catholic Foundation and Catholic Extension have partnered together with a matched fund. Catholic Extension will match dollar for dollar up to \$50,000 of funds raised by the Catholic Foundation for the seminarian education endowment.

The Diocese of Houma-Thibodaux has 14 seminarians, with a possibility of five or so new seminarians, for the fall of 2019. The Lord has answered our call for vocations abundantly, however, as the number of seminarians grows, so does the cost for providing for their education. The Catholic Foundation has committed to supporting our seminarians through this matched fund for seminarian education. It is our prayer and hope that our generous community will come together in support of our seminarians and commit themselves to praying for and supporting these men and their education through the Foundation.

For more information about how to support the seminarian education endowed fund or any endowment, please contact [Amy Ponson](#), executive director of the Catholic Foundation at [985-850-3116](tel:985-850-3116) or cfsf@htdiocese.org.

Women's Giving Circle

Launches in Spring 2019

Each spring we see flowers blooming and new life all around, and same goes for the Catholic Foundation. In the spring of 2019 the Foundation will launch its new initiative, The Mother Teresa Women's Giving Circle, dedicated to bringing together a group of women to learn about the needs of our diocese and community and to raise awareness and funds for philanthropic giving. Designed as a giving circle, this group will leverage a pooled fund to have greater philanthropic impact on the organizations they select. There are many options for joining the Mother Teresa Women's Giving Circle at a variety of different giving levels.

To kick off the Mother Teresa Women's Giving Circle, the Catholic Foundation will host a mass with Bishop Fabre on March 16 at St. Thomas Aquinas followed by a brunch at Nicholls. The ladies will have an opportunity to learn more about the Giving Circle and local nonprofits, strong fellowship and a way to strengthen their faith as Catholic women.

The Mother Teresa Women's Giving Circle is an all-inclusive, hands-on approach to stewardship which we hope will be impactful for our community.

"The Mother Teresa Women's Giving Circle is an initiative that we are excited to launch for our diocese. Having the input from women across our diocese who come together to learn about the needs of the diocese and give back to our church and local community will bring great energy to the diocese. I am eager to watch this group flourish and look forward to celebrating their efforts at our upcoming Mass."

- Bishop Shelton Fabre



MOTHER TERESA
WOMEN'S GIVING CIRCLE

Funds Gifted Thru Foundation

\$1,952,792.40

- Catholic Charities of Houma-Thibodaux
 - Diocese of Houma-Thibodaux Office of Communications
 - Diocese of Houma-Thibodaux
 - Diocese of Houma-Thibodaux Black and Indian Ministries
 - Diocese of Houma-Thibodaux Catholic Schools Office
 - Diocese of Houma-Thibodaux Hispanic Ministry Office
 - Diocese of Houma-Thibodaux Strategic Plans of Hope
 - Edward Douglas White Catholic High School
 - Holy Savior Catholic Church
 - LSU Foundation Camp Tiger
 - Maria Immacolata Catholic Church
 - New Orleans Ballet Association
 - Nicholls State University
 - Sacred Heart Catholic Church, Cut Off
 - Sacred Heart Catholic Church, Montegut
- Special Olympics Louisiana
 - St. Bridget Catholic Church
 - St. Charles Borromeo Catholic Church
 - St. Eloi Catholic Church
 - St. Francis de Sales Cathedral School
 - St. Genevieve Catholic School
 - St. Gregory Catholic School
 - St. Hilary of Poitiers Catholic Church
 - St. Joseph Abbey
 - St. Joseph Catholic School
 - St. Lucy Catholic Church
 - St. Mary Nativity Catholic Church
 - St. Mary Nativity Catholic School
 - The Arc of Greater New Orleans
 - Vandebilt Catholic High School

Statement of Financial Position

ASSETS

Cash and Cash Equivalents	\$82,907
Donor Advised Funds	\$504,097
Investments	\$5,307,138
Agency Funds (Investments held for others)	\$1,339,947
TOTAL ASSETS	\$7,294,089

LIABILITIES AND NET ASSETS

Liabilities	
Accounts Payable	\$55,878
Payable to Parishes	\$1,098
Payable to Diocese	\$224,864
Donor Advised Funds	\$504,097
Agency Funds (Investments held for others)	\$1,339,947
TOTAL LIABILITIES	\$2,185,884
Net Assets	\$5,108,205

TOTAL LIABILITIES AND NET ASSETS	\$7,294,089
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Benefits to **Our Donors**

WILLS AND ESTATE PLANNING ASSISTANCE

The Catholic Foundation partners with attorneys and tax and estate planning experts to offer donors assistance and expertise through their wills and estate planning needs.

FAVORITE MINISTRY

The Catholic Foundation encourages donors to give through the foundation to their favorite ministry of choice, making philanthropic giving simple and impactful. A donor can earmark their gift for a specific beneficiary or can make an unrestricted gift to serve the general purpose of the Catholic Foundation.

TAX ADVANTAGE TO DONORS

The Catholic Foundation of South Louisiana is a 501(c)(3) nonprofit, in which we are able to offer donors tax benefits for their charitable giving.

PROFESSIONAL FUND MANAGEMENT

The Catholic Foundation of South Louisiana's Board of Directors and the Finance Committee provide oversight and professional management of all funds. The Catholic Foundation uses Mission Diocese Fund for its investments and offers reporting and transparency to all donors.

REPORTING TO DONORS

Monthly, quarterly and/or annual reporting is made available and transparency to our donors is a top priority.

HONOR/MEMORIAL GIFTS

The Catholic Foundation of South Louisiana makes it easy to leave a legacy, as well as making gifts to remember or honor a loved one by naming a specific fund, which provide a perpetual gift to the donor's favorite ministry.

GIFTS THAT KEEP ON GIVING

There are a variety of planned giving vehicles that are gifts that continue to work forever by using only the income earned while the keeping the principal of the fund intact.

A Guide To Your Philanthropic Giving

Our board and staff of the Catholic Foundation of South Louisiana is eager to work with you, your family and your professional advisors in making charitable giving **simple** and **impactful**.

Type of Gift	Donor Benefits	Charitable Cause Benefits
Outright Gift	Receives tax deduction in year of gift.	Can use the gift immediately for organizational needs.
Endowment	Receives tax deduction in year of gift and can memorialize a loved one by naming the endowment.	Receives a perpetual source of support for the ministry, e.g., scholarships.
Donor Advised Fund	Receives immediate tax deduction in year of gift and advises distributors in subsequent years to 501(c)(3) entities of donor's choice.	Can receive gifts to benefit ministry at any time.
Charitable Gift Annuity	Is guaranteed fixed income for life, portion of income tax-free, immediate tax deductions.	Benefits from the residual of the annuity.
Bequest	Receives possible estate tax deduction, perpetual gift opportunity.	Bequest could be held in perpetuity and invested to fund ministry's needs.
Life Estate	Immediate, substantial tax deduction of fair market value; retains and maintains use of property; estate tax benefits.	Property transfers to charitable cause when donor's life estate ends.
Charitable Remainder Trust	Receives variable or fixed income, deferred income if desired, also possible income and estate tax deductions.	Upon death of the donor or last surviving income beneficiary, the ministry receives remaining assets.
Charitable Lead Trust	At end of trust period, principal returns to donor or other beneficiaries, principal can pass to others with little or no shrinkage, possible income and estate tax deductions.	Receives income for duration of trust.
Retirement/IRA	Receives estate and income tax savings for substantial portion of gift.	Benefits by significant gift upon the death of the donor.
Insurance Policy	Receives income tax deduction for value of policy when transferred, premium payments may be deducted as gifts, also possible income and estate tax deductions.	Receives full face value of policy upon the death of the donor, or may receive current surrender value prior to donor's death.

Please contact our executive director, **Amy Ponson**, for a confidential conversation at **985-850-3116** or **cfs@hdiocese.org** for more information.

Fund Updates

The Catholic Foundation of South Louisiana offers a variety of charitable vehicles to donors and ministries including endowments, custodial funds, and donor advised funds and much more. We are honored to work with so many within the Diocese of Houma-Thibodaux to steward your gifts and ensure a great future for so many ministries.

Church Parish Funds

- Our Lady of Prompt Succor, Chackbay Endowment
- St. Hilary of Poitiers Youth Formation Endowment
- St. Joseph Co-Cathedral General Endowment

Educational Endowment Funds

- Bishop Sam Jacobs Seminarian Education Endowment
- Brother Alfred Kolb Vanderbilt Endowment
- Brother Ray Kuhn Vanderbilt Endowment
- Gabrielle Hebert Vanderbilt Endowment
- Giardina Family Foundation Seminarian Education Endowment
- James J. Buquet, Jr. Family Foundation Seminarian Education Endowment
- Jane and John Dean Seminarian Endowment
- John and Helen Rizzo Scholarship Endowment Fund
- Juliette Martinez Adams Scholarship Fund
- Mary and Al Danos Foundation Seminarian Endowment
- Megan Hitt Vanderbilt Endowment
- Msgr. Amedee Seminarian Education Endowment
- Paul and Laura Duet Seminarian Endowment
- Seminarian Education General Endowment
- St. Genevieve Catholic School General Endowment
- T. J. Cantrelle Vanderbilt Endowment
- The Peltier Foundation Seminarian Endowment
- Vanderbilt General Fund Endowment
- Vanderbilt Study Body Scholarship Endowment

Catholic Charities Endowments

- Breaux-Delaune Catholic Charities Endowment
- Byron E. Talbot Contractor Catholic Charities Endowment
- Catholic Charities General Endowment
- Giardina Family Foundation Catholic Charities Endowment
- Harold and Gloria Callais Family Endowment
- Marvin and Loretta Marmande Family Endowment
- Morris and Sandra Hebert Family Catholic Charities Endowment
- Mary and Al Danos Foundation Catholic Charities Endowment
- Charlotte Bollinger Family Catholic Charities Endowment

Other Endowments

- Catholic Foundation of South Louisiana General Endowment
- Callais Family Priest Retirement Endowment
- Our Lady of the Rosary Quasi Endowment
- Peltier Foundation Priest Retirement Funds

Custodial Funds

- Our Lady of the Rosary, Larose Custodial Fund
- Sacred Heart, Cut Off Custodial Fund
- St. Joseph Elementary Custodial Fund



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OF SOUTH LOUISIANA

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