



**CATHOLIC
FOUNDATION**
OF SOUTH LOUISIANA

2019 **ANNUAL REPORT**

Message from the **Chairman & Executive Director**

As we reflect back on 2019, I am proud of the great growth we have seen for our diocese, foundation and community! The Catholic Foundation began a new initiative with the Mother Teresa Women's Giving Circle, expanded our reach with our fifth #iGiveCatholic Campaign, engaged numerous parishes and schools in creating new endowments for their long-term future viability and impacted the lives of people across our diocese.

This 2019 Impact Report will give you a brief look into who we are as the Catholic Foundation of South Louisiana and how we connect donors to the causes important to them and provide parishes, schools and ministries with vital resources that help them thrive and flourish today and into the future.

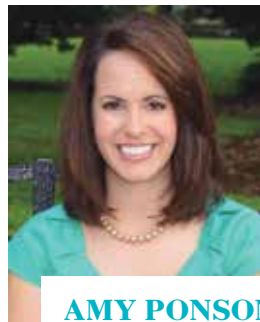
We want to thank all of our generous donors who give so graciously of their blessings and the ministries who continue to serve our local community and make a huge impact with their gifts. We are proud to say that the Catholic Foundation of South Louisiana is a place where everyone can call home, everyone can define their legacy and our entire community can help express their Catholic faith for generations to come.

Wishing you peace and all God's blessings!

Sincerely,



CHARLOTTE BOLLINGER
BOARD CHAIRMAN



AMY PONSON
EXECUTIVE DIRECTOR



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.



Women's Giving Circle Steering Committee
Not pictured: Andree Buquet, Ginny Corte,
Karen David, Renee Gautreaux, Clarisse
Waguespack, Lillie Romano

Profiles

Catholic Foundation Hosts Fifth Annual #iGiveCatholic Giving Day

Over the past five years, the Catholic Foundation has hosted the Diocesan #iGiveCatholic Giving Day on #GivingTuesday as a way for our Catholic Community to come together as one and support our local church parishes, schools and nonprofit ministries. The 2019 Campaign yet again exceeded our expectations engaging over **2,000 donors** and raising over **\$475k**. The bayou region continues to demonstrate their faith by giving Catholic on #GivingTuesday.

Since its inception in our diocese, the generosity of our community has grown substantially and has raised collectively over **\$1 million** dollars for our church parishes, schools and ministries. #iGiveCatholic has helped to replace leaking roofs, build new adoration chapels, secure the campuses of our Catholic schools, renovate buildings and so much more.

Thank you for your unwavering support and sharing of the Lord's blessings.

CFSL Launches Mother Teresa Women's Giving Circle

Mother Teresa once said “Not all of us can do great things, but we can do small things with GREAT LOVE,” a quote that is at the root of the reason the Catholic Foundation launched its Mother Teresa Women's Giving Circle. The launch of the 2019 Giving Circle focused on supporting women, children and families in the local bayou region. In its first year, over **110 members** joined together and helped to grant **\$62,500** to six local nonprofits. These grants helped to purchase a new ultrasound machine, provide utilities assistance, train teachers at St. Lucy Child Development Center care and much more. Thank you to our members in our inaugural year; your gifts are making a difference.



Gift of \$16,000 to Crossroads Pregnancy Resource Center



Gift of \$15,000 to Individual & Family Assistance Program



Gift of \$14,000 to MacDonnell Methodist Children's Program



Gift of \$10,000 to Catholic Community Center



Gift of \$5,000 to St. Lucy Child Development Center



Gift of \$2,500 to Upside Downs



Impacting Lives

Bishop Shelton J. Fabre and the Catholic Foundation of South Louisiana Board of Directors made distributions from established endowments within the Foundation in July of 2019. Each year through the support of many gracious donors, endowments for our church parishes, schools and diocesan ministries continues to grow.

These endowments have been invested and managed by the Catholic Foundation with the intent to make an annual distribution to each beneficiary ensuring a consistent annual support of their mission. Members of the Board elected to make distributions of **\$112,128** to the diocese for seminarian education, **\$44,457** to Catholic Charities and **\$1,061** to Our Lady of Prompt Succor, Chackbay, based on their collective endowments.

"Through the mercy of God and the generosity of many people, the Catholic Foundation has grown in an outstanding way in order to support our diocese and our many ministries. Each year the financial gifts we receive from endowments with the Catholic Foundation fund the education of several of our seminarians, support the operations of some church parishes, and fund the impactful work of Catholic Charities, such as our food banks and assistance to families who need help. I am grateful for the wonderful work of the Catholic Foundation, and pray for the foundation's continued success"

- Bishop Shelton J. Fabre

CFSL Helps Grant Safety Grants to Parishes and Schools

The Diocese of Houma-Thibodaux and the Catholic Foundation of South Louisiana worked together to grant over **\$500,000** to church parishes, Catholic schools and diocesan ministries for security improvements of campuses. In an effort to increase the security and safety of campuses across the diocese, Bishop Shelton J. Fabre invited parishes and schools within the diocese to submit security grants for possible funding. In collaboration with the diocese, the Catholic Foundation grants committee evaluated all submitted grants and made final recommendations to fund over half a million dollars throughout the diocese for security improvements.

“In today’s climate the safety of our children, parishioners, staff and volunteers is of our utmost priority. Our diocese and the Catholic Foundation are committed to increasing security measures and are pleased to be able to grant over **\$500,000** to 40 church parishes, schools and ministries across the Diocese of Houma-Thibodaux. We are thrilled to be able to help our locations enhance their security for the safety of our people,” said Bishop Fabre.

In an effort to improve security for the people of our diocese, Bishop Fabre and the diocesan finance council approved allocation of these funds from its self-funded property insurance fund to be used for security improvements only. The granted funds to each parish and school are for a variety of security improvements such as door jams for classrooms, surveillance systems, electronic locking systems, and much more.





Spotlight

A Lifelong Commitment To Giving

Serving the community has been a lifelong commitment for Father Wilmer 'Willie' Todd that has gone above and beyond his ordination to the priesthood. During his time as a priest, Father Todd served in many positions, such as school counselor and then principal at both Holy Cross Elementary and Central Catholic High School. He also served on a number of boards, including Terrebonne General Medical Center, and as pastor at a number of parishes within the Diocese of Houma-Thibodaux.

Throughout his life, Father Todd has witnessed schools and church parishes needing financial support start new programs to help their ministries grow. He saw a great need to raise

funds for the community he served throughout his entire career, which led him to create an endowed donor advised fund to support the Catholic Foundation of South Louisiana.

The Father Willie Todd Donor Advised Fund allows Father Todd to continue to make contributions to his fund and recommend grants to the organizations he chooses each year.

Partnering with the Catholic Foundation of South Louisiana allows Fr. Todd the flexibility and simplicity of giving to any nonprofit he chooses. In addition, he has involved a small board of community members to take part in his philanthropy and help decide which grants to recommend.

2019 CFSL

2nd Annual Dinner



Catholic Foundation Annual Dinner





Funds Gifted Through Foundation

Over \$862,000

- Arc of New Orleans
 - Bayou Playhouse
 - Bridge to Independence
 - Camp Spike N Wave
 - Catholic Charities
 - Catholic Charities Individual Family Assistance
 - Catholic Community Center - Catholic Charities
 - City Park Story Land
 - Crossroads Pregnancy Resource Center
 - Diocese of Houma Thibodaux
 - Edward Douglas White Catholic High School
 - Holy Savior Catholic Church
 - Mac Donnell United Methodist
 - Max Charter School
 - New Orleans Ballet Association
 - Nicholls Artworks
- Nicholls State University
 - Our Lady of the Isle Catholic Church
 - Our Lady of Wisdom Catholic Church
 - St. Bridget Catholic Church
 - Cathedral of St. Francis de Sales Catholic Church
 - St. Genevieve Catholic School
 - St. Gregory Catholic Elementary
 - St. Hilary of Poitiers
 - St. Joseph Co-Cathedral
 - St. Joseph Abbey
 - St. Lucy's Child Development Center
 - St. Thomas Catholic Church
 - Thibodaux Volunteer Fire Dept.
 - Upside Downs

Statement of Financial Position

ASSETS

Cash and Cash Equivalents	\$173,678
Donor Advised Funds	\$480,353
Custodial Accounts	\$652,263
Investments	\$5,891,158
Agency Funds (Investments held for others)	\$2,150,475
TOTAL ASSETS	\$9,347,928

LIABILITIES AND NET ASSETS

Liabilities	
Accounts Payable	\$17,285
Payable to Parishes	\$8,584
Custodial Funds	\$652,263
Agency Funds (Investments held for others)	\$2,150,475
TOTAL LIABILITIES	\$2,828,608
Net Assets	\$6,519,320

TOTAL LIABILITIES AND NET ASSETS	\$9,347,928
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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, which means 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 provides 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 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.

Endowment Funds

- Bishop Sam Jacobs Seminarian Education Endowment
- Breaux-Delaune Catholic Charities Endowment
- Byron Talbot Catholic Charities Endowment
- Callais Family Priest Retirement Fund Endowment
- Catholic Charities Endowment
- Catholic Foundation General Endowment
- Charlotte Bollinger Family Catholic Charities Endowment
- Dean J. Chiasson Seminarian Endowment
- Earline & Roy LeBlanc Fund - Catholic Charities
- EDW Facilities Quasi-Endowment
- EDW Professional Development Quasi-Endowment
- EDW Tuition Assistance Quasi-Endowment
- Fr. Brett Lapeyrouse Seminarian Education Fund
- Fr. Patrick Riviere Endowment for Seminarian Education
- Fr. Willie Todd Foundation - Quasi Fund
- Giardina Family Foundation Catholic Charities Endowment
- Giardina Family Foundation Seminarian Education Endowment
- Grant J. Louviere Seminarian Education
- Harold & Gloria Callais Family Endowment
- James J. Buquet, Jr. Family Seminarian Endowment
- Jane & John Dean Seminarian Endowment
- John & Helen Rizzo Scholarship Endowment Fund - Vanderbilt Catholic High School
- Juliette Martinez Adams Scholarship Endowment Fund
- Lena "Bobbie" Sere' Seminarian Fund
- Leon 'Ponoke' & Marlene Champagne Seminarian Endowment
- Marvin & Loretta Marmande Catholic Charities Endowment
- Mary & Al Danos Foundation Catholic Charities Endowment
- Mary & Al Danos Foundation Seminarian Fund
- Mary Timothy Everett Seminarian Fund
- Morris & Sandra Hebert Catholic Charities Endowment
- Mother Teresa's Women's Giving Circle
- Mr. & Mrs. Joseph J. Cefalu, Sr. Seminarian Education
- Msgr. Amedee Seminarian Education Endowment
- Nell Talbot Legendre Scholarship Endowment
- Our Lady of Prompt Succor, Chackbay Endowment
- Our Lady of the Rosary Quasi Endowment
- Parker Conrad Seminarian Education Endowment
- Patrick Murphy Assisi Bridge House Endowment
- Paul & Laura Duet Seminarian Burse
- Peltier Foundation Priest Retirement Fund
- Rev. Clemens Schneider Sem. Endowment
- Richard Peltier Seminarian Endowment
- Saint John Vianny Endowment for Priest Retirement
- Seminarian Education Endowment
- Society of Joseph, Husband of Mary - Seminarian Ed
- St. Ann Catholic Church Endowment
- St. Bridget Legacy Endowment Fund
- St. Genevieve School General Endowment
- St. Hilary of Poitiers Youth Formation Endowment
- St. Joseph Catholic Elementary School Quasi Fund
- St. Joseph Co-Cathedral Endowment
- The Crawford Family Fund
- The Peltier Foundation Seminarian Endowment Fund
- Vanderbilt Catholic HS Brother Alfred Kolb Endowment
- Vanderbilt Catholic HS Brother Ray Kuhn Endowment
- Vanderbilt Catholic HS Gabrielle Hebert Endowment
- Vanderbilt Catholic HS General Endowment
- Vanderbilt Catholic HS Megan Hitt Endowment
- Vanderbilt Catholic HS Student Body Scholarship Endowment
- Vanderbilt Catholic HS T.J. Cantrelle Endowment
- Viola Ann Wallace Vosbein Memorial Seminarian Burse
- Works of St. Vincent Quasi Endowment

Custodial Funds

- Our Lady of the Isle Custodial Fund
- Our Lady of the Rosary Custodial Fund
- Sacred Heart Parish, Cut Off Custodial Fund
- St. Joseph Catholic Elementary School Custodial Fund
- St. Genevieve Catholic Church Rainy Day Fund



Catholic Foundation of South Louisiana **Board of Directors**

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William ‘Bill’ New

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