



The Catholic Foundation  
ARCHDIOCESE OF SANTA FE

## EXECUTIVE COMMITTEE MEETING

June 27, 2018

### Minutes

**Members Present:** John Heer, Scott Lardner, Dennis Garcia, Greg Edwards, Fr. Graham Golden, Jim Higdon, Tony Strati

**Members Absent:** Sheila Brown, Don Rigali, Stan Sluder

**Staff Present:** Ed Larrañaga, Dorothy Sheehi, Lori Nemeth, Michele Benavidez

**I. Opening Prayer**

Ed Larrañaga opened the June 27, 2018 meeting of the Executive Committee with a prayer at 8:38 a.m.

**II. Review of May 23, 2018 Meeting Minutes**

The Committee reviewed the May 23, 2018 meeting minutes (attached). Minutes were approved as presented.

**III. President's Report**

Ed Larrañaga reported that we expect to receive about \$1 M from the estate of a donor who recently passed away.

**IV. Budget & Audit Committee**

Dennis Garcia reported on the May financial statements (attached). There were no significant changes in the variances from May. The audit by Pulakos CPAs for the end of the fiscal year is coming up in July.

**V. Investment Committee**

Jim Higdon reported on the Investment Summary (attached). The Committee approved revisions to the CRT/GA policy. Annette Bidart will be the acting advisor for the \$5 M we currently have invested in CBIS funds. Jim commented that he believes raising tariffs will not damage the economy as much as predicted; people will find alternatives.

**VI. Real Estate Committee**

Greg Edwards reported on updates to the Hager property. The Committee met on June 20 to discuss two letters received from Judy Ross's lawyer. Bill R. Keleher, Jr. was recommended to represent the Foundation.

**Motion: Greg Edwards moved to engage Mr. William R. Keleher, Jr. to represent the Foundation in this legal matter, and to authorize the President to execute the engagement letter received from Mr. Keleher. Dennis Garcia seconded and the motion passed unanimously.**

**VII. Board Engagement Committee**

Scott Lardner and Ed Larrañaga reported on Board Engagement. Still waiting on the final steps to bring Laurie Roach on as a new trustee. Pulakos will give a brief presentation on the new tax laws at the July

Board meeting, which will be held at Catholic Charities. The October Board meeting is tentatively scheduled for St. Edwin's Parish in Albuquerque.

**VIII. Community Outreach Committee**

Father Graham reported that he will be meeting with Michele Benavidez and Martha Medina on July 3 to discuss planning.

**IX. Grant Committee**

Michele Benavidez reported in Sheila Brown's absence. Michele and Ed met with Archbishop Wester's staff on June 5 and received helpful feedback on their funding priorities.

**A. Grants**

67 small grants, 2 large grants, 1 recurring grant, and discretionary money was approved by the Grant Committee for a total of \$448,924 (see attached grant list).

**Motion: Dennis Garcia moved to approve the grant distributions as presented, Tony Strati seconded, and the motion passed unanimously.**

**B. Scholarships**

Although we have 6 total competitive scholarship funds, 4 are recently established and/or will not have distributions this year. The Maloof scholarship continues to be our main source of funding (about \$50 K) and is designated for K-12 grade Bernalillo County residents chosen by committee. We also have 1 Leyendecker scholarship awardee for \$275. See attachment for list of scholarship recipients (the letter A represents alternates).

**Motion: Greg Edwards moved to approve the scholarship distributions as presented, Dennis Garcia seconded, and the motion passed unanimously.**

**C. Donor Advised Funds**

Most of the recommendations for donor advised distributions have been received, with the exception of the Cramer Family Fund (recommendation expected in October 2018) and the Archbishop of Santa Fe Fund (awaiting recommendation). There was some discussion about whether donor advised funds permit distributions larger than the calculated amount. Approval of distributions is pending review of the affected fund agreements.

**D. CAT Awards**

10 applications were received for the Catholic Award for Teachers, and 6 awardees were chosen by the anonymous benefactor. \$1,000 is given to each teacher, and \$100 is deposited in each school's endowment fund at the Foundation.

**Motion: Greg Edwards moved to approve the scholarship distributions as presented, Dennis Garcia seconded, and the motion passed unanimously.**

Dorothy Sheehi informed the Committee that Tony Salgado is requesting 1/3 of the St. John Vianney Burse Agency fund for distribution this year.

**X. President Performance Review**

Staff was excused for discussion of the President Performance Review process. An ad hoc committee will be formed to discuss the process for performance reviews.

**XI. Other Business**

No other business.

**XII. Closing Prayer**

Father Graham closed the meeting with a prayer at 10:45 a.m.

**The next Board Meeting will be held July 25, 2018 at 10:00 a.m. at Catholic Charities in Albuquerque.**

**The next Executive Committee Meeting will be held August 22, 2018 at 8:30 a.m.**



**The Catholic Foundation**  
ARCHDIOCESE OF SANTA FE

**EXECUTIVE COMMITTEE MEETING**

**June 27, 2018**

**8:30am – 10:00am**

**Agenda**

- I. Opening Prayer
- II. Review and Approval of May 23, 2018 Meeting Minutes – no action required
- III. President's Report
  - A. Activity Update
- IV. Budget & Audit Committee
  - A. Financial Report
- V. Investment Committee
- VI. Real Estate Committee
  - A. Hager Update & Value discussion
- VII. Board Engagement Committee
- VIII. Community Outreach Committee
- IX. Grant Committee
  - A. Grant Recommendations
  - B. Scholarship Recommendations
  - C. Donor Advised Recommendations
  - D. C.A.T. Awardees
- X. Chairman's Report
  - A. President Performance Review discussion
- XI. Other Business
- XII. Closing Prayer



The Catholic Foundation  
ARCHDIOCESE OF SANTA FE

**EXECUTIVE COMMITTEE MEETING**  
**May 23, 2018**

**Minutes**

**Members Present:** Stan Sluder, Scott Lardner, Dennis Garcia, Fr. Graham Golden, Greg Edwards, Don Rigali

**Members Absent:** John Heer, Sheila Brown, Jim Higdon, Tony Strati

**Guests Present:** Tom Growney, Jim Hakeem, Ron Hensley

**Staff Present:** Ed Larrañaga, Lori Nemeth

**I. Opening Prayer**

Ed Larrañaga opened the May 23, 2018 meeting of the Executive Committee with a prayer at 8:33 a.m. Stan Sluder led the meeting in John Heer's absence.

**II. Review of March 21, 2018 Meeting Minutes**

The Committee reviewed the March 21, 2018 meeting minutes (attached). Minutes were approved by the Committee as presented.

**III. President's Report**

Ed Larrañaga reported on the Catholic Symposium we hosted at La Fonda in Santa Fe, May 1-3. It was a great success and we received excellent feedback from attendees. Ed met with Allen Sanchez from CHI St. Joseph's Children. CHI will continue to be our presenting sponsor at the Grant Awards Luncheon this year. Allen and Ed are trying to arrange a meeting between the Foundation, CHI, Catholic Charities, and Christus St. Vincent Hospital to develop new ideas on how to work together more effectively.

**IV. Budget & Audit Committee**

**A.** Dennis Garcia reported on the April financial statements (attached). There were no significant changes in the variances from March. On the Balance Sheet, the overage under Assets, Cash – endowment will begin to resolve because we donated \$570k of the \$700k we were holding for a pass-through donor. Our real estate investments will be analyzed and updated to reflect current value.

**B.** Staff was excused for an Executive Session to review the budget.

**C.** Ratify Fiscal Year 2019 Budget

**Motion: Scott Lardner moved to approve the 2019 Budget, Greg Edwards seconded, and the motion passed unanimously.**

**V. Investment Committee**

Ed Larrañaga and Greg Edwards reported in Jim Higdon's absence. American Realty Advisors gave a presentation on their American Core Fund at the Investment Committee meeting on May 15. The Committee voted on recommendations from Annette Bidart. Discussions regarding restructuring when

CBIS no longer acts as an investment advisor may be tabled until next year due to the fact that the search was conducted last summer.

**VI. Real Estate Committee**

- A. Ed Larrañaga gave an update on the Rio Rancho Property. We had an offer of \$73k, which we countered with \$100k. It is currently valued on our records at \$230k. The property is zoned as equestrian, but the county may rezone as residential soon.
- B. Ed also gave a brief update on the Hager Property. Greg Edwards would like to step down as chair of the Real Estate Sub-Committee.

**VII. Board Engagement Committee**

Scott Lardner and Ed Larrañaga reported on Board Engagement, which met in April. We would like to keep our Board size at about 25 members. The Committee discussed steps for future prospective searches, including succession planning, financial sponsorship, and community involvement. Waiting on a few final steps to bring Laurie Roach on as a new trustee. We would like to strategically encourage more involvement from rural areas. Pulakos will give a brief presentation on the new tax laws at the July Board meeting.

**VIII. Community Outreach Committee**

Father Graham reported that the first Community Outreach Committee meeting was held after the last Board meeting in April. The process is underway for getting organized and brainstorming ideas.

**IX. Grant Committee**

Lori Nemeth reported in Sheila Brown's absence. We received 89 small grant applications; the category breakdown was 1 other, 6 historic preservation, 8 Catholic education, 15 capital improvement, 18 faith formation, and 41 human services. More than \$592k was requested for small grants. We have \$448,923 available for grant distributions, including large grants. We received 2 large grant applications; St. Michael's High School in Santa Fe requesting \$25k and Samaritan House in Las Vegas requesting \$25k. Michele and Ed will meet with Archbishop Wester on June 5 to review grant priorities. Grant Committee members are currently reviewing and scoring grants, and will meet June 12 for the final grant review. We received 9 applications for the CAT award this year, and 6 nominees were chosen by our benefactor to receive an award.

**X. Chairman's Report**

No Chairman's Report.

**XI. Other Business**

There was some discussion about the St. Pius reorganization, switching to a President and Principal collaborative model. Father John Trambley comes highly recommended for his new role as President.

**XII. Closing Prayer**

Father Graham closed the meeting with a prayer at 9:30 a.m.

**The next Executive Committee Meeting will be held June 27, 2018 at 8:30 a.m.**

**THE CATHOLIC FOUNDATION**  
**COMPARATIVE OPERATING INCOME STATEMENT**  
**May 31, 2018**

	Annual Budget	Budget YTD	Actual YTD	Variance Fav/(Unfav)	
<b>REVENUE</b>					
Administrative Fees	500,000	458,300	493,596	35,296	(a)
Contributions - Cash	32,000	29,200	25,511	(3,689)	(b)
Grant Awards Luncheon (net)	41,735	41,735	46,739	5,004	(c)
<b>Total Revenue</b>	<b>573,735</b>	<b>529,235</b>	<b>565,846</b>	<b>36,611</b>	
<b>EXPENSES</b>					
Salaries	347,760	319,020	316,798	2,222	(d)
Payroll Taxes	24,860	22,660	22,716	(56)	
Employee Benefits	40,725	37,555	37,217	338	
Marketing/Advertising	26,680	24,330	20,459	3,871	(b)
Community Awareness and Cultivation	5,600	5,100	2,500	2,600	(e)
Board Engagement Events	2,500	1,960	938	1,022	(b)
Conferences and Seminars	3,500	3,000	2,880	120	
Development	9,250	8,850	6,119	2,731	(f)
Equipment Maintenance/Repair	1,500	1,500	1,511	(11)	
General Office Supplies	3,000	2,750	2,776	(26)	
Banking Fees	600	550	95	455	
Miscellaneous	750	685	538	147	
Office Equipment	500	455	1,012	(557)	
Office Lease	33,850	31,010	31,010	-	
Postage and Handling	2,700	2,475	2,030	445	
Professional Affiliations/Memberships	2,500	2,295	100	2,195	(g)
Professional Fees	22,050	21,865	21,050	815	
Program Expense	2,920	2,600	2,742	(142)	
Software Maintenance/Upgrades	17,940	17,140	18,575	(1,435)	(h)
Telephone/Fax	5,100	4,675	5,018	(343)	
Travel/Entertainment	3,000	2,750	3,496	(746)	
<b>Total Expenses</b>	<b>557,285</b>	<b>513,225</b>	<b>499,580</b>	<b>13,645</b>	
<b>Capital Expenses</b>	<b>11,000</b>	<b>11,000</b>	<b>10,389</b>	<b>611</b>	
<b>NET INCOME (DEFICIT)</b>	<b>5,450</b>	<b>5,010</b>	<b>55,877</b>	<b>50,867</b>	

(a) Variance due to fees from new endowment funds and 0.5% increase in CRT/GA fees effective November 2017.

(b) Variance due to timing.

(c) Favorable variance due to reduced costs, notably printing, mailing, decorations and photography.

(d) Favorable variance due to hourly employees working less hours than budgeted.

(e) Favorable variance due to delaying parish relations, deanery & presbyteral council and young catholic group meetings.

(f) Variance due to delaying Planned Giving workshops, special recognition gifts, prospective donor & professional advisory group meetings.

(g) Favorable variance due to foregoing Council on Foundation associate membership.

(h) Unfavorable variance due to switching to Blackbaud NXT software (cloud computing).

**The Catholic Foundation**  
**Balance Sheet as of May 2018**  
with Comparative Totals for Prior Year

	<b>Current Year</b>	<b>Prior Year</b>
Assets		
Assets		
Cash and cash equivalents - operations	\$511,899.74	\$452,763.77
Cash and cash equivalents - endowment	\$90,758.38	\$267,079.84
Furniture and equipment, less accumulated depreciation	\$28,196.84	\$21,675.03
Other Assets	\$12,180.57	\$12,868.36
Total Assets	\$643,035.53	\$754,387.00
Investments		
Real estate	\$2,516,258.18	\$2,532,968.73
Marketable securities	\$45,572,080.38	\$43,292,787.64
Total Investments	\$48,088,338.56	\$45,825,756.37
Total Assets	\$48,731,374.09	\$46,580,143.37
Liabilities and Net Assets		
Liabilities		
Accounts payable and accrued liabilities	\$52,494.35	\$48,563.79
Grants distributable	\$26,476.70	\$3,760,499.32
Charitable remainder annuity trusts and gift annuities	\$2,496,483.43	\$3,468,607.27
Agency obligations	\$16,891,010.75	\$16,145,136.71
Total Liabilities	\$19,466,465.23	\$23,422,807.09
Net assets:		
Unrestricted	\$9,128,476.65	\$7,583,999.27
Temporarily restricted	\$1,772,162.43	\$1,162,136.00
Permanently restricted	\$18,364,269.78	\$14,411,201.01
Total Net assets	\$29,264,908.86	\$23,157,336.28
Total Liabilities and Net Assets	\$48,731,374.09	\$46,580,143.37

**The Catholic Foundation**  
**Income Statement for July 1, 2017 - May 31, 2018**  
with Comparative Totals for Prior Year

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Agency</u>	<u>Split Interest</u>	<u>Total</u>	<u>Prior Year</u>
<b>Public support and revenues</b>							
Contributions	706,055	68,129	3,806,340	1,506,177	50,001	6,136,703	612,158
Investment income	597,695	509,521	0	622,306	0	1,729,521	1,140,209
Realized gain (loss) on investments	133,174	(7,842)	0	171,951	0	297,283	(514,447)
Unrealized gain (loss) on investments	449,443	552,931	0	613,281	0	1,615,655	3,707,704
Administrative fees	366,761	0	0	0	0	366,761	329,706
Administrative fees on agency obligations	126,835	0	0	0	0	126,835	125,865
Other income	77,075	0	0	0	0	77,075	74,190
<b>Total Public support and revenues</b>	<u>2,457,037</u>	<u>1,122,740</u>	<u>3,806,340</u>	<u>2,913,714</u>	<u>50,001</u>	<u>10,349,832</u>	<u>5,475,385</u>
<b>Expenses</b>							
Grants and distributions	23,736	11,484	0	1,249,293	0	1,284,513	100,192
Salaries	316,798	0	0	0	0	316,798	303,179
Professional fees	41,560	28,665	0	144,273	0	214,498	222,247
Rent and office lease	31,010	0	0	0	0	31,010	30,438
Employee benefits and payroll taxes	59,934	0	0	0	0	59,934	53,713
Printed materials	20,459	0	0	0	0	20,459	30,545
Promotion and public relations	40,892	0	0	0	0	40,892	37,289
Office expense	27,647	0	0	0	0	27,647	24,606
Telephone/fax	5,018	0	0	0	0	5,018	4,398
Postage	2,030	0	0	0	0	2,030	2,767
Conventions and seminars	8,793	0	0	0	0	8,793	2,117
Insurance	261	0	0	0	0	261	267
Administrative fee expense	0	366,761	0	0	0	366,761	329,706
<b>Total Expenses</b>	<u>578,137</u>	<u>406,910</u>	<u>0</u>	<u>1,393,566</u>	<u>0</u>	<u>2,378,613</u>	<u>1,141,464</u>
<b>NET SURPLUS/(DEFICIT)</b>	<u><b>1,878,900</b></u>	<u><b>715,829</b></u>	<u><b>3,806,340</b></u>	<u><b>1,520,148</b></u>	<u><b>50,001</b></u>	<u><b>7,971,219</b></u>	<u><b>4,333,921</b></u>



**THE CATHOLIC FOUNDATION**  
of **THE ARCHDIOCESE OF SANTA FE**  
**INVESTMENT SUMMARY June 27, 2018**

**Return on Foundation's Portfolio**

Total investment portfolio at May 31, 2018 (excluding land) was \$45.7M.

Endowment Fund (AndCo \$35.9M): +9.5% 12mos—1.2% above index, +6.8% annualized prior 5 yrs—0.4%pts below index. (CBIS \$5.8M): -0.7% 3mos—on index.

CRT/GA Fund (\$3.3M): +9.3% 12mos—1.2%pts above index, +7.3% annualized prior 5 yrs—0.3% above index.

Intermediate Fund (\$0.7M): +7.1% 12mos—0.9%pts above index, +5.6% annualized prior 5 yrs—0.4%pts below index.

**Actions of Investment Committee** (last 5/15, next 8/21)

Visit from mgt. of American Core Reality. Reallocated \$0.25M from Cohen & Steers to ACR. Began education process on potential infra-structure investing. Approved revisions to CRT/GA policy covering grant funding from amount in excess to projected disbursement requirement.

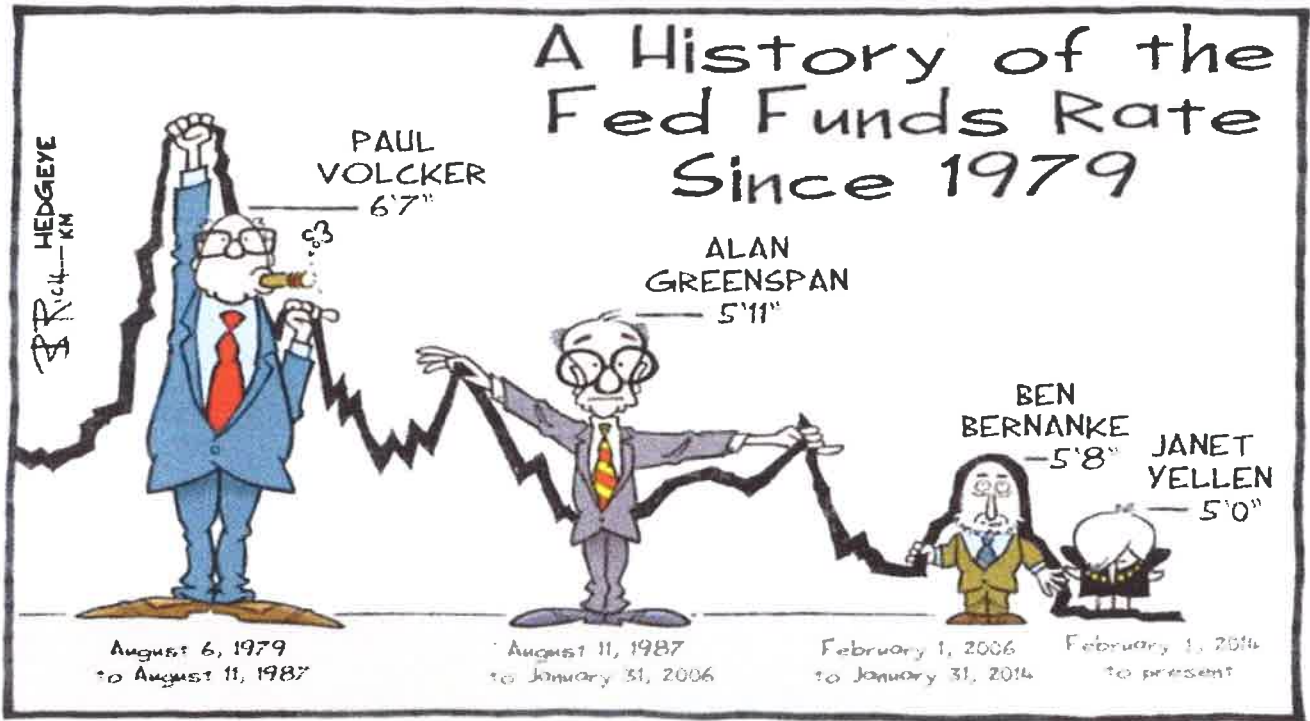
CBIS doesn't want to provide advisor services. Moved responsibility for advice to Annette Bidart.

**Investment Environment**

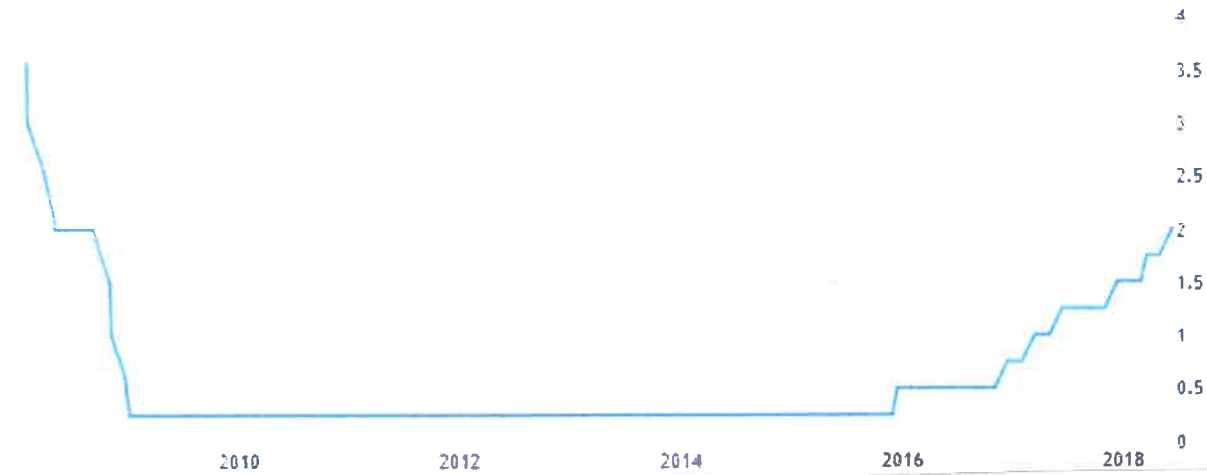
Interesting times. US equity markets up about 12% CFASF fiscal year; down about 5% from Jan high. International equity markets up 5-7% FYTD.

Tariffs! Chupacabra!

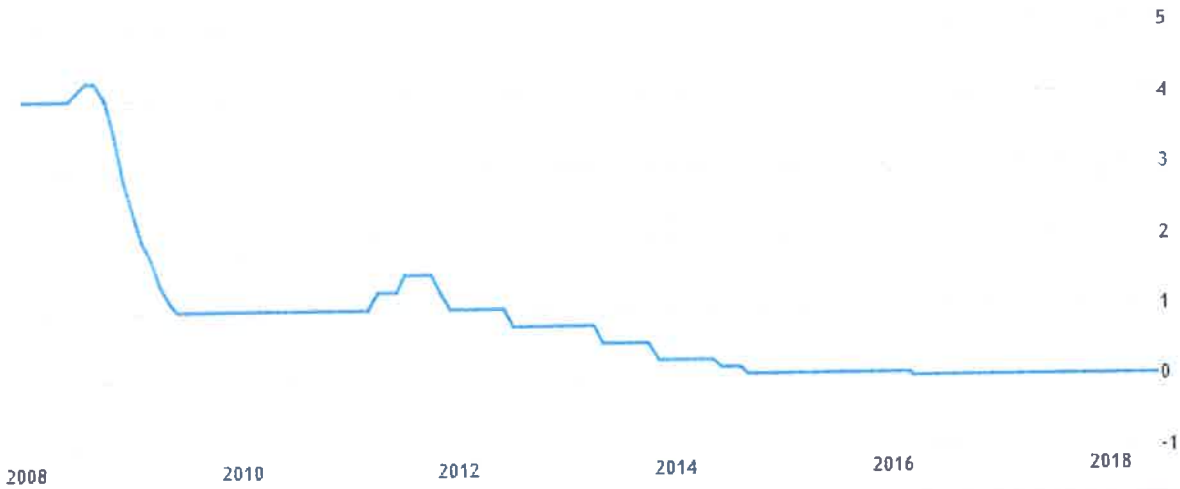
Managers of City of Santa Fe don't produce accurate accounting of finances.



US FED FUNDS RATE



ECB INTEREST RATE



**THE CATHOLIC FOUNDATION  
2018 Grants Funded**

<b>Proposal #</b>	<b>Parish/School/Organization</b>	<b>City</b>	<b>Amount Request.</b>	<b>Category</b>	<b>Keywords</b>	<b>Total Funded</b>
LG-2018-01	Samaritan House, Inc.	Las Vegas	\$25,000	Human Services	ADA update	\$ 25,000
LG-2018-06	St. Michael's High School	Santa Fe	\$25,000	Capital Improve.	classroom remodel	\$ 22,500
	<b>President's Discretionary Fund</b>					<b>\$ 7,500</b>
	<b>Catholic Charities - Casa de Corazon</b>	Albuquerque	<b>\$5,000</b>	Capital Improve.	new building	<b>\$ 5,000</b>
SM-2018-CI03	Pecos Benedictine Monastery	Pecos	\$7,000	Capital Improve.	windows replacement	\$ 5,000
SM-2018-CI04	San Antonio de Padua Parish	Penasco	\$7,000	Capital Improve.	roof replacement	\$ 7,000
SM-2018-CI08	St. Francis Xavier Parish	Albuquerque	\$7,000	Capital Improve.	electric upgrade	\$ 7,000
SM-2018-CI11	Our Lady of Guadalupe Parish	Pena Blanca	\$7,000	Capital Improve.	general repairs	\$ 5,000
SM-2018-CI13	St. Anthony of Padua Parish	Fort Sumner	\$7,000	Capital Improve.	roof replacement	\$ 7,000
SM-2018-CE02	Our Lady of the Assumption School	Albuquerque	\$2,135	Catholic Education	STREAM Club	\$ 2,135
SM-2018-CE03	San Felipe de Neri School	Albuquerque	\$3,250	Catholic Education	Chromebooks	\$ 3,000
SM-2018-CE04	St. Mary's School	Belen	\$6,900	Catholic Education	Foundational Skills	\$ 5,000
SM-2018-CE06	San Felipe de Neri School	Albuquerque	\$4,000	Catholic Education	Makerspace	\$ 4,000
SM-2018-CE07	St. Charles Borromeo School	Albuquerque	\$2,800	Catholic Education	Chromebooks	\$ 2,800
SM-2018-CE08	St. Charles Borromeo School	Albuquerque	\$2,200	Catholic Education	Makerspace	\$ 2,200
SM-2018-FF02	La Santisima Trinidad Parish/Holy Trinity Parish	Arroyo Seco	\$7,000	Faith Formation	relig. ed. program	\$ 7,000
SM-2018-FF03	San Diego Mission	Jemez Pueblo	\$7,000	Faith Formation	relig. ed. coord. salary	\$ 7,000
SM-2018-FF05	Sacred Heart of Jesus Parish	Espanola	\$7,000	Faith Formation	relig. ed. program	\$ 1,314
SM-2018-FF08	Archdiocese of Santa Fe	Albuquerque	\$3,500	Faith Formation	music ministry	\$ 3,500
SM-2018-FF09	Archdiocese of Santa Fe (Middle School Ministry)	Albuquerque	\$2,500	Faith Formation	Middle School	\$ 2,500
SM-2018-FF10	Archdiocese of Santa Fe - Catholic Schools Office	Albuquerque	\$7,000	Faith Formation	MCFD program	\$ 7,000
SM-2018-FF11	El Ranchito de los Ninos	Los Lunas	\$7,000	Faith Formation	education program	\$ 6,000
SM-2018-FF13	Santuario de San Martin de Porres Parish	Albuquerque	\$7,000	Faith Formation	support groups	\$ 7,000
SM-2018-FF14	Dominican Ecclesial Institute	Albuquerque	\$5,000	Faith Formation	Fall Mission	\$ 5,000
SM-2018-FF15	Our Lady of Guadalupe Parish	Taos	\$7,000	Faith Formation	youth group	\$ 2,000
SM-2018-FF16	St. Augustine Parish	Isleta	\$4,000	Faith Formation	relig. ed. program	\$ 4,000
SM-2018-FF17	St. Helen Catholic Community	Portales	\$7,000	Faith Formation	furniture replacement	\$ 7,000
SM-2018-HP01	Archdiocese of Santa Fe - Historic/Artistic Patrimony	Santa Fe	\$7,000	Historic Pres/Restor	travel compensation	\$ 7,000
SM-2018-HP02	Cornerstones Community Partnerships	Santa Fe	\$7,000	Historic Pres/Restor	youth program	\$ 7,000
SM-2018-HP03	Cristo Rey Parish	Santa Fe	\$7,000	Historic Pres/Restor	windows replacement	\$ 7,000
SM-2018-HP04	Nuestra Senora del Rosario Mission Church	Chimayo	\$7,000	Historic Pres/Restor	alter screen	\$ 7,000
SM-2018-HP05	San Juan Nepomuceno Parish	El Rito	\$7,000	Historic Pres/Restor	mission repairs	\$ 7,000
SM-2018-HS02	St. Felix Pantry, Inc.	Rio Rancho	\$7,000	Human Services	client needs	\$ 7,000

**THE CATHOLIC FOUNDATION  
2018 Grants Funded**

<b>Proposal #</b>	<b>Parish/School/Organization</b>	<b>City</b>	<b>Amount Request.</b>	<b>Category</b>	<b>Keywords</b>	<b>Total Funded</b>
SM-2018-HS03	Holy Ghost Parish	Albuquerque	\$7,000	Human Services	food & utility	\$ 7,000
SM-2018-HS04	Interfaith Community Shelter	Santa Fe	\$7,000	Human Services	shelter support	\$ 7,000
SM-2018-HS05	Holy Family Parish	Albuquerque	\$7,000	Human Services	food pantry support	\$ 7,000
SM-2018-HS06	St. Thomas Aquinas Parish	Rio Rancho	\$6,000	Human Services	SVdP rent & utility	\$ 6,000
SM-2018-HS07	St. Thomas Aquinas Parish	Rio Rancho	\$1,800	Human Services	Thanksgiving dinners	\$ 1,800
SM-2018-HS08	Samaritan House, Inc.	Las Vegas	\$7,000	Human Services	food program	\$ 7,000
SM-2018-HS09	Canones Early Childhood Center	Canones	\$7,000	Human Services	education program	\$ 7,000
SM-2018-HS10	St. Elizabeth Shelter for the Homeless	Santa Fe	\$5,000	Human Services	lost ID replacement	\$ 5,000
SM-2018-HS11	ASF/Rachel's Vineyard of New Mexico	Albuquerque	\$7,000	Human Services	healing retreat	\$ 5,000
SM-2018-HS12	Estancia Valley Catholic Parish	Moriarty	\$7,000	Human Services	SVdP food & utility	\$ 7,000
SM-2018-HS14	St. Alice Parish	Mountainair	\$7,000	Human Services	needs assistance	\$ 7,000
SM-2018-HS15	ALM Food Pantry	Angel Fire	\$6,000	Human Services	food program	\$ 6,000
SM-2018-HS16	Barrett Foundation	Albuquerque	\$6,435	Human Services	meals program	\$ 6,435
SM-2018-HS17	Catholic Charities	Albuquerque	\$7,000	Human Services	refugee program	\$ 7,000
SM-2018-HS18	Catholic Charities	Albuquerque	\$7,000	Human Services	In-Kind Center	\$ 7,000
SM-2018-HS19	New Life Pregnancy Center	Taos	\$3,444	Human Services	ultrasounds	\$ 3,444
SM-2018-HS20	Our Lady of Belen Parish	Belen	\$7,000	Human Services	Widow's Mite	\$ 7,000
SM-2018-HS21	St. Pius X High School	Albuquerque	\$7,000	Human Services	hunger program	\$ 7,000
SM-2018-HS22	Casa de Mariposa	Albuquerque	\$7,000	Human Services	operating expenses	\$ 7,000
SM-2018-HS23	Archdiocese of Santa Fe - Family Life Ministry	Albuquerque	\$3,000	Human Services	Mariposas program	\$ 3,000
SM-2018-HS24	Immaculate Conception Parish	Cimarron	\$6,500	Human Services	food assistance	\$ 6,500
SM-2018-HS25	Locker #505: Student's Clothing Bank	Albuquerque	\$5,500	Human Services	shoe program	\$ 5,500
SM-2018-HS26	Our Lady of Guadalupe	Villanueva	\$7,000	Human Services	food program	\$ 5,000
SM-2018-HS27	Puerto Seguro-Safe Harbor Inc.	Socorro	\$5,800	Human Services	washers & dryers	\$ 5,800
SM-2018-HS28	Rio Grande Food Project	Albuquerque	\$7,000	Human Services	food program	\$ 7,000
SM-2018-HS29	Sacred Heart Parish	Albuquerque	\$6,996	Human Services	SVdP food &	\$ 6,996
SM-2018-HS30	TenderLove Community Center	Albuquerque	\$7,000	Human Services	mentoring program	\$ 7,000
SM-2018-HS31	Comedor de San Pascual, Inc.	Las Vegas	\$5,000	Human Services	meal & food program	\$ 5,000
SM-2018-HS32	Immaculate Conception Parish	Las Vegas	\$7,000	Human Services	Feed the Children	\$ 7,000
SM-2018-HS33	Family Promise	Albuquerque	\$7,000	Human Services	homeless program	\$ 7,000
SM-2018-HS34	Little Poor One Food Pantry	Taos	\$7,000	Human Services	food program	\$ 5,000
SM-2018-HS35	New Mexico Faith Coalition for Immigrant Justice	Albuquerque	\$7,000	Human Services	document filing fees	\$ 7,000
SM-2018-HS36	Our Lady of Guadalupe Parish	Peralta	\$7,000	Human Services	children needs	\$ 7,000

**THE CATHOLIC FOUNDATION  
2018 Grants Funded**

<b>Proposal #</b>	<b>Parish/School/Organization</b>	<b>City</b>	<b>Amount Request.</b>	<b>Category</b>	<b>Keywords</b>	<b>Total Funded</b>
SM-2018-HS37	St. Thomas the Apostle Parish	Abiquiu	\$7,000	Human Services	SVdP storage unit	\$ 7,000
SM-2018-HS38	St. Gertrude the Great Parish	Mora	\$7,000	Human Services	food & utility	\$ 7,000
SM-2018-HS39	Our Lady of Guadalupe Parish	Pena Blanca	\$7,000	Human Services	food & utility	\$ 7,000
SM-2018-HS40	Villa Therese Catholic Clinic	Santa Fe	\$7,000	Human Services	Dental Clinic	\$ 7,000
SM-2018-HS41	Pueblo de Abiquiu Library and Cultural Center	Abiquiu	\$7,000	Human Services	children's program	\$ 7,000

**\$467,760**

**\$448,924**

**THE CATHOLIC FOUNDATION  
2018 SCHOLARSHIPS**

<b>Grade</b>	<b>Student LN</b>	<b>Student FN</b>	<b>Year</b>	<b>School</b>	<b>Award Amt</b>	<b>Scholarship</b>
03	Stuchly	Nathan	2018	Holy Child School	\$ 1,000.00	Maloof
05	Huizar	Kael	2018	Holy Ghost Catholic School	\$ 500.00	Maloof
07	Huizar	Grysell	2018	Holy Ghost Catholic School	\$ 500.00	Maloof
04	Rascon	Julian	2018	Holy Ghost Catholic School	\$ 1,000.00	Maloof
03	Martinez	Ethan	2018	Our Lady of Fatima School	\$ 500.00	Maloof
07	Martinez	Citlalic	2018	Our Lady of Fatima School	\$ 500.00	Maloof
07	Toledo	Tristen	2018	Our Lady of Fatima School	\$ 1,000.00	Maloof
02	Marsh	Hunter	2018	Our Lady of the Annunciation	\$ 500.00	Maloof
05	Marsh	Daegan	2018	Our Lady of the Annunciation	\$ 500.00	Maloof
02	Mireles	Emma	2018	Our Lady of the Annunciation	\$ 1,000.00	Maloof
08	Pham	Johnathan	2018	Our Lady of the Annunciation	\$ 1,000.00	Maloof
05	Swanson	Kaiden	2018	Our Lady of the Annunciation	\$ 500.00	Maloof
06	Swanson	Kameron	2018	Our Lady of the Annunciation	\$ 500.00	Maloof
06	Davis	Elijah	2018	Our Lady of the Assumption	\$ 500.00	Maloof
08	Davis	Tessa	2018	Our Lady of the Assumption	\$ 500.00	Maloof
K	Eustice	Camille	2018	Our Lady of the Assumption	\$ 1,000.00	Maloof
01	Garner	Madison	2018	Our Lady of the Assumption	\$ 1,000.00	Maloof
04	Nguyen	Thai	2018	Our Lady of the Assumption	\$ 500.00	Maloof
06	Nguyen	Serina	2018	Our Lady of the Assumption	\$ 500.00	Maloof
05	Romero	Gabriel	2018	Our Lady of the Assumption	\$ 275.00	Leyendecker
07	Vargas	Frine	2018	Our Lady of the Assumption	A	Maloof
K	Ibarra	Ezequiel	2018	Queen of Heaven	\$ 1,000.00	Maloof
01	Mccamey	Eli	2018	Queen of Heaven	\$ 1,000.00	Maloof
02	Anaya	Diego	2018	San Felipe De Neri	A	Maloof
04	Chacon	Aiden	2018	San Felipe De Neri	\$ 1,000.00	Maloof
02	Cruz	Arianna	2018	San Felipe De Neri	\$ 1,000.00	Maloof
06	Cruz	Evangelynn	2018	San Felipe De Neri	\$ 1,000.00	Maloof
05	Diaz	Alejandro	2018	San Felipe De Neri	A	Maloof
K	Grado	Eli	2018	San Felipe De Neri	\$ 1,000.00	Maloof
01	Jaramillo	Lexi	2018	San Felipe De Neri	\$ 1,000.00	Maloof
03	Maestas	Elijah	2018	San Felipe De Neri	\$ 1,000.00	Maloof
05	Montoya	Mariana	2018	San Felipe De Neri	\$ 1,000.00	Maloof
03	Munoz	Leilah	2018	San Felipe De Neri	\$ 1,000.00	Maloof
06	Padilla	Kelis	2018	San Felipe De Neri	\$ 1,000.00	Maloof
06	Rodriguez	Cecilia	2018	San Felipe De Neri	\$ 1,000.00	Maloof
02	Hernandez	Giana	2018	St. Charles Borromeo	\$ 1,000.00	Maloof
04	Valencia	Isabella	2018	St. Charles Borromeo	\$ 1,000.00	Maloof
03	Crespin	Xavier	2018	St. Mary's School	\$ 500.00	Maloof
05	Crespin	Makayla	2018	St. Mary's School	\$ 500.00	Maloof
02	Flores	Braae	2018	St. Mary's School	\$ 1,000.00	Maloof
04	Gallegos	Bella	2018	St. Mary's School	\$ 1,000.00	Maloof
03	Rascon	Erwin	2018	St. Mary's School	\$ 1,000.00	Maloof
08	Solis	Kailany	2018	St. Mary's School	\$ 1,000.00	Maloof

**THE CATHOLIC FOUNDATION  
2018 SCHOLARSHIPS**

05	Vargas	Cierra	2018	St. Mary's School	\$ 1,000.00	Maloof
07	Soliz	Angel	2018	St. Michael's Catholic School	\$ 490.50	Farrar
12	Doughty	Logan	2018	St. Pius X High School	\$ 490.50	Farrar
10	Gallegos	Amelia	2018	St. Pius X High School	\$ 1,000.00	Maloof
10	Lohman	Courtney	2018	St. Pius X High School	\$ 1,000.00	Maloof
10	Martinez	Tristan	2018	St. Pius X High School	\$ 1,000.00	Maloof
12	Mcconnell	Joedon	2018	St. Pius X High School	\$ 1,000.00	Maloof
12	Melero	Jazmyn	2018	St. Pius X High School	\$ 1,000.00	Maloof
11	Olguin	Megan	2018	St. Pius X High School	\$ 1,000.00	Maloof
12	Pham	Luke	2018	St. Pius X High School	\$ 500.00	Maloof
09	Roddy	Isabel	2018	St. Pius X High School	\$ 1,000.00	Maloof
09	Sanchez	Breanna	2018	St. Pius X High School	\$ 1,000.00	Maloof
10	Sanchez	Derryk	2018	St. Pius X High School	\$ 1,000.00	Maloof
12	Silva	Isaac	2018	St. Pius X High School	\$ 1,000.00	Maloof
11	Sisneros	Santana	2018	St. Pius X High School	\$ 500.00	Maloof
10	Zambrano	Augustus	2018	St. Pius X High School	\$ 1,000.00	Maloof
01	Adams	Tristan	2018	St. Therese Catholic School	\$ 1,000.00	Maloof
02	Kaminski	Charlotte	2018	St. Therese Catholic School	\$ 1,000.00	Maloof
06	Mcconnell	Carson	2018	St. Therese Catholic School	\$ 500.00	Maloof
03	Padilla	Valentina	2018	St. Therese Catholic School	\$ 1,000.00	Maloof
08	Sisneros	Samantha	2018	St. Therese Catholic School	\$ 500.00	Maloof
05	Vernier	Clara	2018	St. Therese Catholic School	\$ 500.00	Maloof
06	Vernier	Santiago	2018	St. Therese Catholic School	\$ 500.00	Maloof
01	Vigil	Leah	2018	St. Therese Catholic School	A	Maloof
01	Larranaga	Ava	2018	St. Thomas Aquinas	\$ 1,000.00	Maloof
<b>Total</b>					<b>\$ 52,256.00</b>	

**THE CATHOLIC FOUNDATION**  
**2018 DONOR ADVISED DISTRIBUTION RECOMMENDATIONS**

<b>Fund</b>	<b>Distribution</b>	<b>Beneficiary</b>
Akerson Family Fund	14,610.20	Norbertine Community, ABQ
	14,610.20	St. Bonaventure Indian Mission, Thoreau for water project
	14,610.20	Healthcare for the Homeless, ABQ
Alta Vista Fund <b>Note: Giving more than distrib. (2,446.41)</b>	2,500.00	Monastery of Christ in the Desert, Abiquiu
Archbishop of Santa Fe Donor Advised Fund	35,000.00	6/25 waiting on distribution recommendations
Barbara and Ray Zimmer Fund	1,000.00	Our Lady of Sorrows Church, Las Vegas for organ restoration
	1,000.00	Norbertine Community, ABQ
	500.00	Our Lady of Guadalupe Church, Pecos
	500.00	Center for Action and Contemplation, ABQ
	500.00	Equestrian Order of the Holy Sepulchre, Houston TX
Brack Family Foundation Fund	2,049.77	Holy Cross Catholic Church Pope John Paul II - Family Life Center, Las Cruces
Carolyn Dooley Martinez Fund	1,034.48	Our Lady of Assumption School, ABQ
	1,034.48	Santuario de San martin de Porres, ABQ
Cramer Family Fund		6/4 will designate distributions in Oct 2018
Deacon James Q.A. Baca Holy Family Fund	3,072.11	Our Lady of Guadalupe Church, Pena Blanca
	500.00	Catholic Charities, ABQ for feeding the hungry
Grady and Keeler Fund <b>Note: Giving more than distrib. (1,851.46)</b>	2,000.00	Catholic Charities, ABQ for building fund
	1,800.00	Catholic Charities, ABQ for Matthew 25
	1,200.00	Norbertine Community, ABQ
James and Pricilla Sands Family Fund	2,000.00	St. Joseph on the Rio Grande, ABQ for Nazareth Center
	918.01	St. Pius X High School Foundation, ABQ
	2,000.00	Catholic Charities, ABQ
Lambda Theta/TKE	2,860.88	ASF - Office of Family Life
Michael L. and Margaret W. Keleher Fund	4,468.10	Province of Our Lady of Guadalupe of the Order of Friars Minor, ABQ
Rosemary and Aldo Vaio Fund	1,838.83	Our Lady Of Fatima School, ABQ for library upgrade
Sheila and Ole Peloso Fund	2,416.47	Immaculate Conception Church, ABQ
Tony and Marie Hillerman Fund	6,000.00	St. Marin's HopeWorks, ABQ
	3,000.00	Casa Angelica, ABQ
	4,524.20	Monastery of Christ in the Desert, Abiquiu
William S. and Joanna D. Booth Family Fund	3,206.38	Our Lady of Fatima Church, ABQ



## 2018 CAT Awardees

### St. Therese Catholic School, Albuquerque

- Susan Peterson
  - 2<sup>nd</sup> Grade

### Our Lady of the Annunciation, Albuquerque

- Austen Walsh
  - 4<sup>th</sup> Grade

### San Felipe de Neri, Albuquerque

- Bridget DeLanoy
  - 4<sup>th</sup> Grade

### St. Charles Borromeo, Albuquerque

- Donna Gallegos
  - K-8<sup>th</sup> Grade Art and Physical Ed.

### Our Lady of the Assumption, Albuquerque

- D. Annette Cason
  - 5<sup>th</sup> Grade

### Our Lady of Fatima, Albuquerque

- Elizabeth Gray
  - PK