"Start by doing what’s necessary; then do what’s possible, and suddenly you are doing the impossible."

— St. Francis of Assisi
Dear Friends,

This year, The Catholic Foundation is celebrating its twentieth anniversary! Inspired by faith – and the vision of a stronger, more vibrant future for the Church – The Catholic Foundation was formed in 1991 as one of the fruits of the Archdiocesan Pastoral Plan. Under the wise leadership of Michael Keleher and Ray Zimmer, community and Church leaders were brought together to build a charitable organization for endowed funds that would forever be a wellspring of financial support for Catholic ministry. In 1993, when Michael Sheehan became Archbishop of Santa Fe, he embraced the work of the Foundation and became our spiritual leader and advocate.

Thanks to the faithful and generous gifts of more than 1,000 donors, we have built nearly $36 million in endowment assets – making it possible for us to give over $10.6 million in grants and other distributions that are responsive to human needs. This year alone, The Catholic Foundation is distributing $1,434,600 from the endowments and other charitable instruments.

On this special anniversary, we are recognizing the foresight and leadership of our founders by creating an endowment in their honor. The Founders Endowment will provide grants for the most pressing needs in our communities. We welcome everyone to join us in honoring our founders by making a gift to the Founders Endowment. Please contact Mary Dunn at (505) 872-2901, or mary@thecatholicfoundation.org, for more information.

Over these twenty years, we have been abundantly blessed with the grace of both giving and receiving, and we thank each and every one of you for allowing us into your lives. Together, we have accomplished twenty years of works of the heart. Together, let’s celebrate both our history and our future!

Sincerely,

Ruth Kelly
President

Mary P. Dunn
Executive Director
Moved by the level of poverty and the number of families going hungry in Taos, New Mexico, Franciscan Brother Francis Brown started a simple food program from the kitchen of an old convent in Our Lady of Guadalupe Parish. In his quest to emulate and put into practice the spirit of St. Francis, Brother Francis began weekly rummage sales to raise funds to buy food for the poor. Funded by a grant from The Catholic Foundation, he has reduced substantially the immense work of rummage sales. Assisted by a Franciscan nun and several volunteers, Brother Francis distributes food once a week to approximately 50-60 families and about 12-13 lunch bags are distributed the same day to the one homeless shelter in Taos. Brother Francis' program also assists with utilities and gas, and if anybody needs food outside of the weekly distribution day, he will provide it. This simple food program is a work of the heart under the leadership and inspiration of the indefatigable Brother Francis Brown.
Nestled in the middle of the village of Cañones in northern New Mexico is a remarkable program for young children. At the Cañones Early Childhood Center children are immersed in activities that foster confidence, a positive cultural identity and healthy family interaction. Children are involved in exploration, play and learning activities, while parents are given training and support for learning and development activities at home. Serving primarily families of St. Thomas the Apostle Parish in Abiquiu, the Cañones Early Childhood Center provides transportation for the children as well as breakfast, snack and lunch, and parents are encouraged to volunteer at the school. The greatest achievement of this pre-school program is bringing children out of their isolation and poverty to engage in social interaction with each other, and making learning fun and rewarding. A grant from The Catholic Foundation allows Cañones to serve children without charge.
Throughout the Archdiocese of Santa Fe, families struggle to pay the cost of sending their children to Catholic schools. Catholic education and fostering faith are priorities for Archbishop Sheehan. This academic year, The Catholic Foundation will distribute $14,000 from the Archbishop’s School Fund to help meet the growing need for tuition assistance.

More than 1,000 students over a 17-year period have been able to attend Catholic schools in Bernalillo County with more than $850,000 in scholarships provided by the Phillip J. Maloof Scholarship Fund. For the 2011-2012 academic year, $50,000 in scholarships will be awarded to 62 students attending the following schools: Holy Ghost, Our Lady of Fatima, Our Lady of the Annunciation, Our Lady of the Assumption, Queen of Heaven, San Felipe de Neri, St. Charles Borromeo, St. Mary’s, St. Pius X High School, St. Therese, and St. Thomas Aquinas.

The Catholic Foundation expresses its sincere gratitude to the entire Maloof family for their generosity and investment in Catholic education in Bernalillo County.
Traveling the country roads of northern New Mexico, enchanted by the vistas of green fields set against rolling hills and endless blue skies, one can easily claim the ideals of rural America. But the reality is, nestled within that magnificent landscape are communities of people struggling to cope with high unemployment, hunger, substance abuse, domestic violence, insufficient healthcare and a lack of educational resources.

In the Archdiocese of Santa Fe, we are blessed with parishes and mission churches that provide an anchor in the storm of life for these communities; pastors who are committed heart and soul to the spiritual and temporal well-being of their people; and lay leaders who are engaged in the life of the Church and serve with faith and hopefulness.

In an effort to gain a deeper understanding of the challenges faced by rural parish communities and to maximize the impact of its grants, The Catholic Foundation is forming two regional councils for the northern and eastern deaneries of the Archdiocese. In 2011 the Northern Regional Council was launched, with pastors and lay leaders from these communities coming together to share their experiences and engage in dialogue about how Foundation grants can best help them address critical needs.

Regional Council members reviewed this year’s grant proposals from northern New Mexico and contributed valuable knowledge and insight about what is happening in their communities, their strengths and weaknesses, and the capability of programs being reviewed to help meet their greatest needs. Father Francis Malley, Dean of the Northwest Deanery remarked, “I had my doubts that this would be meaningful. Now I see that our input is important and can really make a difference. And I learned things I didn’t know about other parish communities”.

The Northern Regional Council is chaired by Jim Higdon, who is a trustee of The Catholic Foundation and member of Cristo Rey Parish in Santa Fe. Jim is a retired executive from the high tech industry, and is a partner with the venture capital firm Verge Fund. Jim was one of the leaders in a successful capital campaign for the restoration of Cristo Rey Church. He has deep ancestral roots in rural New Mexico and enjoys meeting and working with the people who are devoted to making these communities thrive. Commenting on this year’s grant reviews by the Regional Council, Jim said, “We benefited greatly from the participation of people from the northern parishes. They shared with us their understanding of the needs in their communities and their efforts to assist in meeting those needs.”

In 2012, the Foundation will begin a regional council for eastern New Mexico, bringing together pastors and lay leaders from the eastern deaneries of the Archdiocese.
During the first five years of life 90% of our brain development occurs, and our experiences in those years shape the way we learn, think, and behave throughout our lives. New Mexico ranks 46th in the nation in measuring the well-being of our children, 49th in teen birth rates, and 47th for the percentage of children living in poverty. St. Joseph is a voice on issues that impact the health and development of children ages 0-5 years, because it is what happens in those first five years that makes a lifetime of difference.

At St. Joseph Community Health, the goal is to ensure that children reach kindergarten with the health and family capacity necessary to support learning. Children who start school ready to learn are more likely to read at grade level by the 3rd grade — a significant indicator of high school graduation and future success in life.

St. Joseph’s Home Visiting program supports parents through education and skills training. Home visitors help parents bond with their children and develop skills for healthy, effective parenting. The Enhanced Referral Services program teaches families how to access community services in dealing with life challenges such as housing, food, income support, medical services, employment, and education. The Advocacy program works to change public policy, influence the allocation of resources to meet the needs of children and their families, remove barriers to service, and fill gaps in services.

The Catholic Foundation would like to thank Ron Crowder of InCrowd Productions, who produced the Grant Awards and 20th Anniversary Celebration video, for telling the moving story of the impact of The Catholic Foundation’s work on people throughout the Archdiocese of Santa Fe.

The Catholic Foundation would like to acknowledge the outstanding and beautiful work of DeAnn Sena O’Connor who is responsible for the creative design and production of this annual report.
The Catholic Foundation supports the mission of the Church by helping parishes, schools and organizations build resources for their ministries, and by providing grants and other distributions to fund the good works that bring life to the Gospel teachings.

In 2011, The Catholic Foundation distributed a total of $900,662 to fund works of the heart throughout the Archdiocese of Santa Fe. In addition, $533,938 was paid to beneficiaries of charitable remainder trusts and gift annuities managed by The Catholic Foundation. Total giving from the Foundation’s endowments and other charitable instruments in 2011, was $1,434,600.

**DESIGNATED BENEFICIARIES**
- Aquinas Newman Center
- Archdiocesan Catholic schools
- Archdiocesan Vocations Office
- Archdiocese of Santa Fe
  - Birthright of Albq.
  - Birthright of New Mexico
- Boy Scouts of St. Thomas Aquinas Parish
- Casa Angelica
- Cathedral of St. Francis of Assisi
- Catholic Charities
- Catholic Schools Office
- Community of the Risen Savior
- Cristo Rey Parish
- Dominican Ecclesial Institute
- Diocese of Gallup
- Felician Sisters of North America
- Good Shepherd Center
- Holy Family Parish in Chimayo & Truchas
- Holy Ghost School
- Immaculate Conception Parish, Albuquerque
- Immaculate Conception Church, Las Vegas
- Norbertine Community
- Nuns at St. Thomas Aquinas School in Rio Rancho, NM
- Old Guadalupe Church in Santa Fe
- Our Lady of the Assumption School in Albuquerque
- Our Lady of the Assumption Parish in Albuquerque
- Our Lady of Belen Parish
- Our Lady of Belen/St. Mary’s School
- Our Lady of Guadalupe Parish, Albuquerque
- Our Lady of Sorrows, Las Vegas
- Our Lady of the Annunciation Parish and School
- Province of Our Lady of Guadalupe-Order of Friars Minor
- Queen of Heaven Parish
- Queen of Heaven School
- Retired, incardinated archdiocesan priests
- Rosario Cemetery in Santa Fe
- Sacred Heart Parish, Clovis
- San Felipe de Neri Church
- San Felipe de Neri School
- Santa Maria de la Vid Priory
- Santo Nino Regional Catholic School
- Secular Order of Servants of Mary, Belen
- Secular Order of Servants of Mary, Peralta
- St. Charles Borromeo School
- St. Charles Parish
- St. Francis Xavier Parish/Missions
- St. Joseph Community Health
- St. Mary Rest Home
- St. Mary’s Catholic Church, Farmington, NM
- St. Mary’s School, Albuquerque
- St. Pius X High School
- St. Therese Parish
- St. Therese School
- St. Thomas Aquinas School
- St. Vincent de Paul, Albq. Central Council

**BENEFICIARIES OF DONOR ADVISED GRANTS**
- Aquinas Newman Center Building Fund
  - Barrett Foundation
  - Cathedral Basilica of St. Francis of Assisi
  - Catholic Charities’ Building Fund
  - Catholic Charities, Matthew 25 Society
  - Catholic school libraries
  - Dominican Ecclesial Institute
  - Holy Cross Catholic Church, Las Cruces
  - Knights of Columbus Alameda Council #9928
  - Nuestra Sra. de Guadalupe Mission Church, Gallina, NM
  - Our Lady of Fatima Financial Aid Fund
  - Our Lady of Fatima School
  - Our Lady of Guadalupe Parish, Pena Blanca
  - Our Lady of Sorrows, Bernalillo - St. Joseph the Worker
  - Outcomes, Inc.
  - Samaritan House, Inc., Las Vegas
  - St. Alice Parish, Mountainair, St. Vincent de Paul
  - St. Elizabeth Shelter, Santa Fe
  - St. Pius High School
  - St. Thomas Red Mass
  - The Samaritan Counseling Center
<table>
<thead>
<tr>
<th>ORGANIZATION</th>
<th>CITY</th>
<th>PROPOSAL SUMMARY</th>
<th>GRANT AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archdiocese of Santa Fe - Office of Pastoral Outreach Ministry</td>
<td>Albuquerque</td>
<td>The Step Into Freedom prison ministry program trains volunteers to go to jails, prisons and juvenile centers in the Archdiocese to conduct communion services, bible study and prayer services, and to make pastoral care visits. Funds will be used for the volunteer training program.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Archdiocese of Santa Fe - Office of Pastoral Outreach Ministry</td>
<td>Albuquerque</td>
<td>The grant is for Thresholds, a prison ministry program that helps inmates coming out of prison reintegrate into the community. The program supplies clothing, rent supplements, bus passes and bikes, apartment furnishings, scholarships for retreats and assistance with occasional emergency needs. The grant also covers volunteer training and group activities.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Casa Angelica</td>
<td>Albuquerque</td>
<td>Casa Angelica’s Day Program transitions their high school graduates into an adult-oriented program which provides opportunities for becoming productive members of the community. The Day Program provides vocational activities tailored to each individual’s special needs.</td>
<td>$2,500</td>
</tr>
<tr>
<td>Catholic Charities</td>
<td>Albuquerque</td>
<td>The Center for Refugee Settlement and Support and the Center for Immigration and Citizenship Legal Assistance will utilize funds for a collaborative effort to help refugees and immigrants obtain the proper identification to stay permanently in the U.S. and obtain citizenship.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Estancia Valley Catholic Parish, St. Vincent de Paul</td>
<td>Moriarty</td>
<td>The St. Vincent de Paul program at Estancia Valley Catholic Church continues to see an increase in the number of people needing help. The grant will allow many more people in the community to be served.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Holy Child Catholic School</td>
<td>Tijeras</td>
<td>The grant will be used to start an after-school tutoring program and an afternoon art enrichment program for kindergarteners.</td>
<td>$3,000</td>
</tr>
<tr>
<td>Holy Family, Holy Rosary, Risen Savior &amp; St. Therese Parishes, and Albq. Interfaith</td>
<td>Albuquerque</td>
<td>These parishes, in collaboration with Albuquerque Interfaith, will initiate a program to help families suffering from unemployment cope with their hardship and stress. Teams will be organized at each parish to identify families in need, facilitate discussions on critical issues and strategize solutions.</td>
<td>$4,000</td>
</tr>
<tr>
<td>Holy Family Parish, St. Vincent de Paul</td>
<td>Albuquerque</td>
<td>The number of individuals and families suffering economic hardship is on the rise, and St. Vincent de Paul will use the grant funds to increase its service through the Roadrunner Mobile Food Pantry Program.</td>
<td>$5,000</td>
</tr>
<tr>
<td>Holy Ghost Catholic School</td>
<td>Albuquerque</td>
<td>The grant will allow the school to provide gift certificates for school uniforms to unemployed or underemployed families. The school also will purchase textbooks with the grant.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Immaculate Conception Parish</td>
<td>Albuquerque</td>
<td>Immaculate Conception Parish serves the only hot lunch available on Sundays to the homeless in downtown Albuquerque, and the number of clients continues to grow. Grant funds will be used to purchase food and supplies, and to rent a portable toilet.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Little Poor One Fraternity of the Secular Franciscans</td>
<td>Taos</td>
<td>Operating a food distribution program from the kitchen in the old convent at Our Lady of Guadalupe Church in Taos, the brothers will use the grant to buy food and other supplies.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Morada de San Rafael Archangel</td>
<td>Tierra Amarilla</td>
<td>The Morada de San Rafael leases electric heaters from the local power company which are inefficient and expensive. The grant will allow them to purchase three propane heaters at an estimated annual savings of $2,500.</td>
<td>$3,000</td>
</tr>
<tr>
<td>Our Lady of Guadalupe Parish</td>
<td>Santa Fe</td>
<td>The parish’s lunch program for the day laborers who wait for work on the corner of Guadalupe and Agua Fria continues to grow, and funds will help to cover the costs of serving a hot lunch three times a week.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Our Lady of Sorrows Parish, St. Vincent de Paul</td>
<td>Bernalillo</td>
<td>Grant funds will be used to help those in need with utilities, medical expenses, prescriptions, rent and mortgage assistance; for the mobile food pantry and emergency food box programs; and for the Senior Wellness Clinic.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Project Defending Life</td>
<td>Albuquerque</td>
<td>The Moms’ Fund provides financial assistance to pregnant women in need. The grant will allow this ministry to help with rent, food, utility payments, car payments, gas and phone cards. The goal is to eliminate the financial need that is often at the root of a woman’s decision to have an abortion.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Risen Savior Catholic Community, with St. Martin’s Hospitality Center</td>
<td>Albuquerque</td>
<td>For the last 25 years, members of Risen Savior have worked with St. Martin’s to live the tenets of Catholic social teaching. The grant will support the efforts of volunteers to increase their service to the needy at St. Martin’s.</td>
<td>$5,000</td>
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<tr>
<td>Parish/Mission</td>
<td>Location</td>
<td>Description</td>
<td>Amount</td>
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<tr>
<td>Sacred Heart of Jesus Parish – Religious Ed Program</td>
<td>Espanola</td>
<td>The religious education program at Sacred Heart Parish is in need of textbooks and related material, which will be purchased with grant funds.</td>
<td>$4,000</td>
</tr>
<tr>
<td>Sacred Heart of Jesus Parish, St. Vincent de Paul</td>
<td>Espanola</td>
<td>St. Vincent de Paul at Sacred Heart Parish will apply the grant to help meet the increased demand for food, and to pay for vouchers that will enable the homeless to buy prepared foods at a local supermarket.</td>
<td>$3,000</td>
</tr>
<tr>
<td>San Clemente Parish, St. Vincent de Paul</td>
<td>Los Lunas</td>
<td>Funds will be used to serve the increased number of participants in their food, utilities, prescriptions, rent and emergency gas programs.</td>
<td>$5,000</td>
</tr>
<tr>
<td>San Diego Mission</td>
<td>Jemez Pueblo</td>
<td>Sr. Karen Kuta visits the homebound and brings communion to the sick in the villages of Jemez, Santa Ana, Zia, Ponderosa, Canon and San Ysidro. Financial support for the parish has decreased and the grant will allow Sister Karen to continue her ministry.</td>
<td>$7,000</td>
</tr>
<tr>
<td>San Miguel Parish</td>
<td>Socorro</td>
<td>Historic San Miguel Church is undergoing a major restoration which is expected to be completed in 2014. The grant will be applied to the construction of the pews.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Santa Clara Parish</td>
<td>Wagon Mound</td>
<td>The doors of the parish hall, installed in the 1800’s, are in dire need of replacement as they are a safety hazard and allow cold air inside, increasing heating costs. The grant will be used to purchase new doors.</td>
<td>$3,345</td>
</tr>
<tr>
<td>St. Alice Parish, Religious Ed Program</td>
<td>Mountainair</td>
<td>Grant funds will be used to purchase furniture, textbooks, resource books, and office equipment for the religious education program for 1st through 12th grades.</td>
<td>$6,871</td>
</tr>
<tr>
<td>St. Edwin Parish in collaboration with Pb&amp;j Family Services</td>
<td>Albuquerque</td>
<td>St. Edwin Parish refers parishioners to the Therapeutic Preschool program at Pb&amp;j Family Services, and participates in their &quot;Holiday Wish Adopt-A-Family&quot; program. The grant will be applied to the Therapeutic Preschool program for children ages 4-5, who are at risk of abuse and neglect or are in foster care. The program brings children and families together to develop healthy relationships, positive parenting and life skills.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Felix Pantry, Inc.</td>
<td>Rio Rancho</td>
<td>Funds will be used to buy nutritional food for the increasing number of families who come to St. Felix Pantry’s food distribution program.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Gertrude the Great Parish</td>
<td>Mora</td>
<td>The grant will be used by the St. Vincent de Paul Society to assist families with utility bills, i.e., propane and electric bills.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Mary Magdalene Mission Church</td>
<td>Magdalena</td>
<td>St. Mary Magdalene, a mission of San Miguel Parish in Socorro, NM, is renovating the parish hall, which is used for a food program, youth and adult retreats and gatherings after masses. The grant will allow them to buy commercial appliances for the kitchen.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Mary’s School</td>
<td>Belen</td>
<td>The grant is needed for a subsidized before-and-after school program for families who work. Students are given breakfast, snacks, assistance with homework, and opportunities to participate in sports and social activities.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Rose of Lima Parish</td>
<td>Santa Rosa</td>
<td>The parish hall is used for religious education for adults, teens and children, and for other parish functions. It also serves as a gathering place for teens’ activities. The grant will be used to restore the deteriorating plaster and exposed wood.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Therese Catholic School</td>
<td>Albuquerque</td>
<td>The grant will be applied to the acquisition of virtual desktop technology, which will allow the outdated computers to be utilized with today’s technology.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Therese of the Infant Jesus Parish</td>
<td>Albuquerque</td>
<td>The parish will use the funds for its English as a Second Language Program for immigrants.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Thomas the Apostle Parish - Gallina Parish Hall</td>
<td>Abiquiu</td>
<td>Las Guadalupanas of the Gallina mission church of St. Thomas the Apostle Parish is renovating the Guadalupe Parish Hall. The grant will buy windows, a wood heater, a refrigerator, a kitchen stove, lumber for kitchen floor, supplies for kitchen walls and storage cabinets.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Thomas the Apostle Parish, with Canones Early Childhood Center</td>
<td>Canones</td>
<td>This is a free pre-school program for 18 underprivileged, isolated children, most of them members of St. Thomas the Apostle Parish. It is a literacy-enriched program where children learn social skills and early reading and writing skills.</td>
<td>$5,000</td>
</tr>
<tr>
<td>Villa Therese Catholic Clinic</td>
<td>Santa Fe</td>
<td>The grant will be applied to orthodontic treatment for uninsured and underserved adolescents, and to the distribution of gift cards to needy families for food, infant formula and prescription medications.</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

**TOTAL AMOUNT GIVEN THROUGH COMPETITIVE GRANTS:** $186,216
Donors to The Catholic Foundation give out of compassion, using their personal resources to help address needs and support ministries that touch their hearts. Through their annual gifts, endowment gifts, and estate gifts, our donors have made it possible for The Catholic Foundation to celebrate...

TWENTY YEARS OF GOOD WORKS from the heart

Ms. Kathryn A. Flynn
Mr. Samuel Frankenheim
Jean P. Fredette
Rev. David D. Gallegos
Mr. Stephen N. Gallegos
Ms. Grace E. Gallegos
Ms. Nona L. Gregg
Ms. Victoria Hamilton
Mr. and Mrs. Robert G. Hanagan
Mr. and Mrs. Stephen R. Hay
Mr. and Mrs. Daniel Hayes
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Carol A. Heppenstall
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Mr. and Mrs. Philip Jaramillo
A. Mark, Kathleen, “Little” Mark and Adriana Jaramillo
Mr. and Mrs. Tim Jelinek
Mr. and Mrs. Ralph T. Johnson, Jr.
Tina, Dave and Emily Jojola
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John J. Kelly, Esq.
Hon. and Mrs. Paul J. Kelly, Jr.
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Mrs. Carolyn Dooley Martinez
Ms. Michelle A. Marusa
Dr. Mary McDonald
Ms. Catherine McGovern
Mr. and Mrs. Tim McKenna
Mr. and Mrs. Gerard Mechenbier
Ms. Donna B. Miltenberger
Mr. and Mrs. Tony Montefeltro
Ms. Lynette M. Montoya
W. L. Morrison
Mr. and Mrs. William A. Morrison Sr.
Start by doing what’s necessary; then do what’s possible, and suddenly you are doing the impossible.

St. Francis of Assisi

Mr. and Mrs. Brian Murphy-Dye
Ms. Lili M. Naranjo
Mrs. Barbara A. O’Connor
Ms. Flor de María Oliva
Mr. and Mrs. Gilbert S. Ortiz
Mr. and Ms. Tom A. Ortiz
Mrs. Marcella O. Ortiz
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Mr. James Brian Rohleder
Mr. J. A. Rohleder
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Ms. Carol A. Turner
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Mr. and Mrs. Vincent J. Vint
Ms. Eleanor Voutselas
Ms. Ellen Walton
Darren, Elaine, Tyler and Hilary Watson
Ms. Heidemarie Z. Weidner
Mr. and Mrs. Jerry L. Welch
Rev. Dr. George Werner
Mr. Ray Willison
Mr. and Mrs. John L. Zachritz
The Catholic Foundation manages a variety of funds that provide income to meet the needs of Catholic communities throughout the Archdiocese of Santa Fe. The Catholic Foundation invests gifts in permanent endowment funds and distributes earnings from the endowments annually. Earnings from the Foundation’s unrestricted and field-of-interest funds are allocated through a competitive grant proposal process. Designated fund distributions are made to recipients specifically named in endowment agreements. The Catholic Foundation also makes disbursements from a growing number of donor advised funds to beneficiaries selected by the donors.

Foundation funds are invested with professional investment managers and performance is monitored by the Foundation’s Investment Committee. An independent audit is performed annually to ensure open disclosure of all Foundation activities. Call The Catholic Foundation at (505) 872-2901 for more information.

**FUNDS ESTABLISHED THIS YEAR**
- Albuquerque Cristo Rey High School Fund
- George Werner Memorial Fund
- Norma and Linden Price Memorial Fund
- Risen Savior Reserve Fund

**UNRESTRICTED FUNDS**
Unrestricted endowments are established by donors who wish to support the Foundation’s grant program, and whose charitable gifts are not restricted to a particular purpose. These funds allow the Foundation optimum flexibility in responding to grant requests, as we strive to meet the critical needs of schools, parishes, organizations and ministries.
- Beaudette Family Fund
- Dunn and Daly Administrators Fund
- Frances C. Hanzel Memorial Fund
- Francis and Maureen Nye Fund
- George Werner Memorial Fund
- Grace and Dave Sheldon of St. Bernadette Fund
- Jack Ryan Family Fund
- Jane and Thomas McKenna Family Fund
- John A. and Marie B. Flaska Memorial Fund
- McDonald Family Fund
- Mrs. Manuel Lujan, Jr. Fund
- Olympia Jiron Fund
- Paul J. Murphy Fund
- Schmidt Family Fund
- Schmidt Real Estate Fund
- Strosnider Family Endowment Fund
- Unrestricted Endowment
- Virginia M. Reva Memorial Fund

**DESIGNATED FUNDS**
Designated endowments are created by donors wishing to support a particular organization, parish, school or ministry within the Archdiocese of Santa Fe. Income from these funds is paid directly to the institutions named by the donors.
- Annunciation Parish/School Fund
- Anonymous Fund for Seminarians
- Aquinas Newman Center at UNM Fund by Jeanne and Gig Brummell
- Casa Angelica Fund
- Catherine and Eugene W. Hearn Memorial Scholarship Fund
- Catholic Schools Endowment
- Dazzo Family Charitable Fund
- Elizabeth M. Schweiss Memorial Fund
- Ellen and Lucia Sena Seminarian Education Fund
- Family of Michael Vigil Fund
- Franciscan Ministries Fund
- George John Weisenborn Seminary Scholarship Fund
- Good Shepherd Center Fund
- Harriett Scully Seminary Scholarship Fund
- Harve and Linda Weakland Family Endowment Fund
- Hibernian House Priest Home Fund
- Hochrein and Shoue Family Fund
- Iris Fleming Scholarship Fund
- Luana Kay Jaramillo Memorial Fund
- Marriage Enrichment Endowment
- Mary Ann Coghill Scholarship
- Max T. Muhlberger Memorial Fund for the Poor
- Morgan-Bucklin Fund for Birthright of Albuquerque
- Msgr. Bernard Michael Burns Fund for St. Therese of the Infant Jesus Parish
- Our Lady of Fatima School Fund
- Our Lady of Guadalupe Parish Endowment
- Queen of Heaven School Endowment
- Rev. Albert Gallegos Fund for St. Mary’s
- Rev. John Carney Seminarian Support Fund
- Richard M. Hager Memorial Scholarship Fund
- Robert P. Conway Sr. Memorial Education Fund
- St. Charles Borromeo School Fund
- St. John Vianney Seminary Burse
- St. Mary’s School Scholarship Fund
- St. Pius X High School Fund
- St. Stephen’s Diaconate Fund
- St. Therese Scholarship Fund
- Taglialegami Family Fund
- The Ellen and John Cummings Fund for St. Pius X High School
DONOR ADVISED FUNDS
Donor advised endowments allow donors to direct the distribution of income each year to the program, organization, parish or school of their choice. Because there are tax advantages to the donor and the administrative costs are lower, donor advised funds are a sound alternative to establishing a private foundation.

Akerson Family Fund
Alta Vista Fund
Archbishop of Santa Fe Donor Advised Fund
Archbishop Sheehan Scholarship Fund for Lay Ministers
August C. G. and Fannie H. Hetzel Memorial Education Fund
Barbara and Ray Zimmer Fund
Brack Family Foundation Fund
Carolyn Dooley Martinez Fund
Cramer Family Fund
Grady and Keeler Fund
Hillerman Family Endowment
James and Priscilla Sands Family Fund
Lambda Theta/TKE Endowment
Lillian G. Watson Fund
Patrick Jennings Memorial Fund
Peggy and Michael Keleher Fund
Richard M. Hager Foundation Fund
Rosemary and Aldo Vaio Fund
Shelia and Ole Peloso Fund
William S. and Joanna D. Boothe Family Fund

FIELD OF INTEREST FUNDS
Field of interest endowments are established by donors wishing to support a specific cause within the scope of the Foundation’s mission. Income from these funds is distributed through a Foundation grant, scholarship or award program.

EDUCATION
Arthur Quinn Memorial Fund
Burton and Claude Ann McEneaney Fund
Catholic Award for Teachers Fund
Edwin L. Chavez Fund for Education
Friends of Catholic Education Fund
Global Social Justice Education Fund
Grand Rapids Dominicans Fund
James and Mary Fanning Endowment for Education
Larry Lane Memorial Fund
Margaret Crimmins Higdon Memorial Fund
Phillip J. Maloof Scholarship Fund

HEALTH AND HUMAN SERVICES
Marjorie J. Shea Fund
Steven and Lucy Smith Fund
Grand Rapids Dominicans Fund

CLERGY AND RELIGIOUS
Larry Lane Memorial Fund
Norma and Linden Price Memorial Fund
Small Parish Assistance Fund
Rev. Richard J. Drabik Fund

MARRIAGE
Ralph and Ruth Johnson Marriage Endowment Fund

AGENCY FUNDS
Catholic schools, parishes and organizations establish agency endowments with the Foundation to ensure the continuation and growth of their ministries and programs for the future. Annual income distributions are paid directly to the donor agency to be used at the agency’s discretion. Preservation of endowment capital through sound investment practices provides a stable and enduring source of income for parishes, schools and organizations throughout the Archdiocese.

Albuquerque Cristo Rey High School Fund
Alfred W. and Virginia M. LaPine Fund
Alfred W. LaPine and Virginia M. LaPine Scholarship Fund
Alma Ladonsky Memorial Fund
Archbishop’s Pastoral Fund
Archdiocese of Santa Fe Catholic health Initiatives Fund I
Archdiocese of Santa Fe Catholic health Initiatives Fund II
Casa Angelica Fund
Catholic Charities Fund
Cole Family Fund for St. Elizabeth Ann Seton
Community of the Risen Savior Income and Growth Fund
Concha Ortiz y Pino de Kleven Memorial Fund for Santa Nino School
Cristo Rey Endowment Fund
Elizabeth Quinn Scholarship Fund
Eugene D. Monsimer Memorial Fund
Felician-Franciscan Sisters Fund
Franciscan Ministries Fund
Friends of the Cathedral Endowment

Good Shepherd Center Fund
Holy Ghost Catholic School Fund
Immaculate Conception/St. Mary’s Education Fund
Lamy Fund
Lucia and Ellen Sena Memorial Fund
Mary Dilllon Memorial Fund
Mary E. Schumann Endowment
Miss Ernestina Sanchez Memorial Fund (Belen)
Miss Ernestina Sanchez Memorial Fund (Peralta)
Norbertine Community Fund
Our Lady of Belen/St. Mary’s School Endowment Fund
Queen of Heaven Endowment
Rafaela Cardenas Seminary Burse
Sacred Heart Parish Fund (Clovis)
San Felipe de Neri Church Fund
San Felipe de Neri School Fund
Santa Maria de la Paz Catholic Education Assistance Fund
Santo Nino Regional Catholic School Endowment
St. Charles Parish Endowment Fund
St. Francis Scholarship Fund
St. John Vianney Seminary Burse
St. Joseph Community Health Fund
St. Mary’s School Alumni Endowment Fund
St. Therese Development Fund
St. Thomas Aquinas School Endowment Fund

The Catholic Foundation manages other endowment funds created by anonymous donors. These endowments include field of interest funds and unrestricted funds, income from which is distributed through the Foundation's grant program. The Catholic Foundation also manages charitable gift annuities and charitable remainder trusts for individuals and families.
Giving

For both donors and recipients giving is a highly personal and spiritual decision. The Catholic Foundation offers many ways for donors to put their legacy gifts to use for the Catholic parish, school, ministry, organization or Catholic Foundation program of their choice.

- **Outright Gifts**: Cash, Securities, Real Estate
- **Charitable Gift Annuities**: Receive lifetime income with a gift of $10,000 or more.
- **Charitable Remainder Trusts**: Receive an income for life or a specific term of years with a gift of $100,000 or more.
- **Testamentary**: A bequest of any size can be left in a will or trust to The Catholic Foundation. The Foundation can be named as beneficiary of a specific devise, retirement account, insurance policy or the residuum of an estate after family has been provided for.

At The Catholic Foundation, any individual or institution can establish an endowed fund with a perpetual term. Endowment funds are tailored to meet the philanthropic or financial goals of the donor and to provide a stable, predictable source of income for the good works the donor wishes to support. Endowed funds can be established in several ways:

- An immediate gift of $5,000 or more, in the form of cash, securities, life insurance or real estate allows the donor to create an endowment. A simple agreement is prepared that specifies how the donor wishes to have the endowment named and how the income will be used. Funds can be added to the initial endowment at any time with contributions often made to honor birthdays, anniversaries and other special occasions.

- A donor may prefer to establish an endowment and then make his or her largest gift through a will. A donor can sign an endowment agreement early and allow the endowment to be funded later by a bequest.

The donor’s contribution will qualify for the maximum tax deductions allowed by law. The Catholic Foundation recommends that a donor consult an attorney or a financial advisor for assistance in making a gift through a will.

Charitable Gift Annuities

- Need More Cash Flow for Living Expenses?
- Interested in Tax Savings?
- Need to Reduce Capital Gains?
- Desire to Leave a Legacy for Your Parish?

**A GIFT ANNUITY COULD BE THE ANSWER!**

Payments on gift annuities issued by The Catholic Foundation secure fixed income for life, generate higher payments depending on participant age, provide substantial tax savings and add peace of mind.

Call The Catholic Foundation for a free consultation and a personalized annuity plan.

LOVE IN ACTION

IS WHAT GIVES US

grace

MOTHER THERESA

THE CATHOLIC FOUNDATION 2011 ANNUAL REPORT
By including The Catholic Foundation in their wills or trusts and informing us that they have done so, donors become members of the Legacy League during their lifetimes. Donors are invited to join this special group of individuals who desire to foster hope and faith for others.

The Foundation wishes to acknowledge the thoughtfulness and generosity of the diocesan priests who have included The Catholic Foundation in their estate plans.

The staff of The Catholic Foundation would be happy to provide information on how a planned or deferred gift can help donors with their charitable and/or financial planning. To become a member of the Legacy League or to get additional information on estate planning, please contact the Foundation at (505) 872-2901.

The following persons are currently members of the Legacy League:

Mr. and Mrs. Gerald E. Bischoff  
Mr. and Mrs. Bernard “Gig” Brummell  
Mr. and Mrs. Richard N. Carpenter  
Mr. and Mrs. Michael Daly  
Ms. Dorothy J. Daniels  
Mr. and Mrs. Kevin Dunn  
Ms. Cecilia Flood  
Ms. Margaret S. Garcia  
Mr. and Mrs. Harry L. Gogan  
Mr. Joseph R. Higdon  
Mrs. Tony Hillerman  
Mr. and Mrs. Roland A. Jalbert  
Mr. and Mrs. Ralph T. Johnson, Jr.  
Mrs. Frances A. Keeler  
Mr. Mark T. Leonard  
Ms. Shirley Macaron  
Mrs. Hazel B. Morgan  
Mr. and Mrs. Joseph G. Muhlberger  
Mr. and Mrs. Edward T. O’Leary  
Rev. Frank Prieto  
Ms. Marta A. Santiago  
Most Rev. Michael J. Sheehan  
Mr. Charles C. Shirk III  
Mrs. Mary B. Smith  
Mr. Charles Thomas  
Ms. Denise Tierney  
Ms. Mary M. Tomich  
Mrs. Cenia Wenzler  
Rev. Dr. George Werner  
Ms. Benita C. Zimmer  
Mr. and Mrs. Raymond E. Zimmer
CONDENSED STATEMENTS OF FINANCIAL POSITION
June 30, 2011 and 2010

ASSETS

<table>
<thead>
<tr>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents $230,654</td>
<td>$203,847</td>
</tr>
<tr>
<td>Restricted cash 514,512</td>
<td>509,301</td>
</tr>
<tr>
<td>Bequest receivable 266,360</td>
<td>—</td>
</tr>
<tr>
<td>Furniture and equipment, net of accumulated depreciation 40,865</td>
<td>38,642</td>
</tr>
<tr>
<td>Prepaid and other assets 5,274</td>
<td>3,760</td>
</tr>
<tr>
<td>Investments in real estate 2,073,308</td>
<td>2,073,308</td>
</tr>
<tr>
<td>Investment in marketable securities 32,857,233</td>
<td>28,053,984</td>
</tr>
<tr>
<td><strong>$35,988,206</strong></td>
<td><strong>$30,882,842</strong></td>
</tr>
</tbody>
</table>

LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued liabilities $11,211</td>
<td>$14,408</td>
</tr>
<tr>
<td>Grants distributable 788,037</td>
<td>572,207</td>
</tr>
<tr>
<td>Charitable remainder annuity trusts and gift annuities 3,800,816</td>
<td>3,867,621</td>
</tr>
<tr>
<td>Agency obligations 14,730,695</td>
<td>12,508,703</td>
</tr>
<tr>
<td><strong>Total liabilities 19,330,759</strong></td>
<td><strong>16,962,939</strong></td>
</tr>
</tbody>
</table>

Net assets 16,657,447 13,919,903

**$35,988,206**  **$30,882,842**

CONDENSED STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS
Years Ended June 30, 2011 and 2010

SUPPORT AND REVENUES

<table>
<thead>
<tr>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions (net of agency, charitable gift annuity and pass-through contributions of $170,705 in 2011 and $111,543 in 2010) $540,458</td>
<td>$30,935</td>
</tr>
<tr>
<td>Investment gain (net of agency gains of $2,652,540 in 2011 and $1,333,490 in 2010) 2,718,046</td>
<td>1,310,181</td>
</tr>
<tr>
<td>Change in value in charitable remainder annuity trusts 416,510</td>
<td>152,050</td>
</tr>
<tr>
<td>Other income 139,571</td>
<td>140,453</td>
</tr>
<tr>
<td><strong>Total support and revenues 3,814,585</strong></td>
<td><strong>1,933,619</strong></td>
</tr>
</tbody>
</table>

EXPENSES

<table>
<thead>
<tr>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and distributions (net of agency distributions of $393,624 in 2011 and $703,876 in 2010) 507,038</td>
<td>350,740</td>
</tr>
<tr>
<td>Investment and administrative expenses (Net of agency expenses of $188,178 in 2011 and $223,630 in 2010) 570,003</td>
<td>555,511</td>
</tr>
<tr>
<td><strong>Total expenses 1,077,041</strong></td>
<td><strong>906,251</strong></td>
</tr>
</tbody>
</table>

Change in net assets 2,737,544 1,027,368

Net assets, beginning of year 13,919,903 12,892,535

Net assets, end of year **$16,657,447**  **$13,919,903**