Moving Hearts
touching lives
Dear Friends,

The Catholic Foundation is dedicated to moving hearts and touching lives by bringing to life the Gospel teachings and serving as a wellspring of financial support for Catholic ministry. We manage the resources entrusted to us to aid families and children in need.

This year, the Foundation has disbursed a total of $925,614 in grants and designated distributions to parishes, schools and organizations throughout the Archdiocese of Santa Fe. The grants have a remarkable “ripple effect” as the parishes, schools and organizations, in turn, use these funds to impact the lives of thousands of New Mexicans in a multitude of ways.

The Catholic Foundation and its benefactors perpetuate the caring ministries of our Church. In this report we profile just a few of the amazing variety of projects our benefactors have made possible in 2012: ESL classes providing a path to citizenship for recent immigrants; Monthly food distribution to hundreds of low-income families; Sunday dinners for hundreds of homeless men, women and children; Renovation of parish halls as Catholic centers in rural communities; and Art, music and tutoring programs for school children.

Moving Hearts and Touching Lives. Connecting those who care with those in need – this is the grace of stewardship, this is the Catholic Foundation.

Sincerely,

Ruth Kelly
President

Mary P. Dunn
Executive Director

Image: Detail from Michelangelo’s ‘Creation of Adam’, Sistine chapel ceiling in Vatican Museums.
Let us open wide our hearts. It is Joy which invites us.

St. Katherine Drexel
Moving Hearts

Renowned as a civic leader and cofounder of the Albuquerque Community Foundation, Ray Zimmer was approached in the early ‘90s to help start a similar foundation for the Archdiocese of Santa Fe. “We wanted to have a vehicle for donors to include the Church in their charitable giving and estate planning, with the assurance that their gifts would be used only for the purpose they intended. And, we knew it would be important to donors to have professional management for grantmaking and investment of funds.”

And so the Catholic Foundation was born.

“and through its good works in moving the hearts of others we see a very bright and positive future for the families of New Mexico.”

As the parents of six children, Barbara and Ray have always had a deep appreciation for family life programs, which they have been able to support through the donor advised fund they established with the Catholic Foundation. “The education of our young folks is also one of the most urgent needs today,” says Barbara, “so we’re really happy to see the Catholic Foundation providing substantial support through grants.”

“We believe the Catholic Foundation’s progress over the past 21 years has been nothing short of miraculous,” says Ray, “and through its good works in moving the hearts of others we see a very bright and positive future for the families of New Mexico.”
Touching Lives

After a lifetime of significant achievement in information technology, Jim Cramer shifted his focus from science and commerce to community support. Jim and his wife, Geri, first encountered the Catholic Foundation through the 1998 “Faith, Hope and Love” Endowment Campaign. They were intrigued with the opportunity to start a donor-advised endowment that would let them select each year’s beneficiaries. Seeing those grants in action inspired them to grow their funds to a point where they could have a significant impact on the community. “We also wanted to share this experience with our family,” says Geri, “so we gathered everybody together and discussed charitable giving as a family enterprise.” Now the Cramers meet annually to review community needs and determine how their endowment can work best for the poor and vulnerable.

“They helped us establish a way to make charitable giving a part of our family culture, touching lives in our community for generations to come.”

“The Catholic Foundation showed us where the needs are greatest,” says Jim, “and, they also helped us establish a way to make charitable giving a part of our family culture, touching lives in our community for generations to come.”
Bringing the Community Together

The Guadalupanas are a group of ladies who are devoted to “caring for” Our Lady of Guadalupe Church in Gallina, New Mexico. The Church is a mission of St. Thomas the Apostle Parish in Abiquiu, about 40 miles to the north. But, the parish hall in Gallina had fallen into disrepair over the decades. The women wanted to transform it into a facility that could house numerous parish activities and also function as a community center.

They applied to the Catholic Foundation and received a grant that allowed them to complete the renovation. “We have a lot of beautiful traditions here that we’re losing,” says Emily Vigil, president of Las Guadalupanas. “We felt that by having a gathering place we can work with the children and other mission churches to hold on to these traditions. Everything we’ve done has been a labor of love. We prayed for over a year to get the grant money to restore the hall. And now, we’re becoming something of a center for all the little parishes in the region. It’s a miracle! And we’re very grateful to the Catholic Foundation for helping to answer our prayers!”

First Steps Toward Citizenship

The Catholic Foundation is providing a hand up for new members of St. Therese Church in Albuquerque to become more involved citizens, with a grant to underwrite their ESL classes. The classes are led by parishioner Frank Rael, a Los Angeles transplant. “Most students are Mexican immigrants who speak very little English at first,” says Frank. “They are interested in two basic things: they want to use what they learn here to advance their employment – I even have employers asking me if they can send some of their employees to us to help improve their English. But mostly, the students are here because they are anxious to pass the citizenship test. We go through all one hundred of the questions they may be asked. They may only be asked ten of them during the testing, but they have to answer at least eight correctly. I’m confident that after our studies here they will all do well. One thing I can say is that they are all very happy to have these classes, thanks to the Catholic Foundation.”

For it is in giving that we receive.

St. Francis of Assisi
Sound of Music

The sound of music wafts across the meandering hills of Tijeras, New Mexico – flowing from the halls of Holy Child Catholic Elementary School. It’s only the second new Catholic elementary school to have opened in the Archdiocese of Santa Fe in the past thirty years. It’s also one of only five parish classical schools in the country – focusing on “the intellectual history of the Church, the great books and fine arts.” A tall order for a little school nestled among the junipers and piñons of the Sandias? “Not so,” says its passionate principal, Jim Grogan. “Parents are hungry for education that forms a child in what is good, true and beautiful”. The classical commitment led the four-year old school to appeal successfully to the Catholic Foundation for a grant to initiate programs in music, art and summer tutoring. Thanks to that grant, the strains of Salve Regina and Panis Angelicus mingle with youthful violin ensembles among those ancient hills – evoking memories of the Church’s glorious classical heritage.
Regional Councils

In the spring of 2011, The Catholic Foundation began a regional council initiative to bring pastors and lay leaders from outlying areas together to share their experiences and engage in dialogue about how Foundation grants can best help them address critical needs. The Northwest Regional Council was formed that year and in 2012, the Northeast and Southeast Regional Councils were launched.

In our regional council gatherings, we witnessed rural communities in transition where people are turning to the Church for help and for hope. Father Joseph Vigil of St. Thomas the Apostle Parish in Abiquiu reflected, “Church is the center of dignity, purpose and vision for the whole community. We can build on that by working with families to use their own means and gifts to build up community.”

We also heard clergy and lay leaders talk about their efforts to build strong, healthy communities with resources that are never enough. In discussions about poverty in northern New Mexico we learned about the suffering and hardships that are part of the fabric of life in our rural parish communities. Father Larry Brito of St. John the Baptist Parish in Ohkay Owingeh told one gathering, “As pastors we have to look at our ministries and ask, how can we respond to the basic needs of our people? We must seek ways to help people know the value of their lives and how they can live in a deliberate way so they can fulfill their potential as human beings.”

Commenting on the value of the Regional Councils, Noelle Maestas from Holy Cross Church in Santa Cruz said

“I discovered that there are people and organizations that care enough to listen and encourage others on the right path. It’s like giving hope to those who no longer have it.”

“Living in a small town like Las Vegas,” wrote Ray Zimmer, Foundation cofounder and donor, “we see the need for more support for rural parishes and the Catholic Foundation is doing an outstanding job addressing this need through the regional councils and getting input from the outlying areas.” Father John Brasher, a priest serving northern New Mexico parishes since 1982 remarked, “The Foundation is a breath of fresh air in our northern communities – coming into our parishes and hearing our concerns makes us feel less isolated.”

We at the Catholic Foundation will continue in our regional council work to strive to see the world through the eyes of others, to do our part to help build the beloved community and to infuse a sense of hope and confidence in the future. And along the way, to take time with others to enjoy the grace and gifts of life, even with all its challenges and hardships.
Education and Seminarians

Archbishop’s School Fund

The value of Catholic education is undeniable. Academic excellence, along with discipline and values, provide a strong foundation for the development of both mind and soul. But for many families, the cost of Catholic education is difficult to afford. This academic year, a total of $290,000 will be given out for tuition assistance by The Catholic Foundation and the Archdiocese of Santa Fe, thanks to the many families who support the Archbishop’s School Fund and the Annual Catholic Appeal.

The Maloof Scholarship Fund

Since 1998, the Phillip J. Maloof Scholarship Fund has awarded more than $850,000 in scholarships to Catholic school students in Bernalillo County. This academic year, $50,000 in scholarships has been awarded to 59 students attending the following schools: Holy Ghost, Our Lady of Fatima, Our Lady of the Assumption, Queen of Heaven, San Felipe de Neri, St. Charles Borromeo, St. Mary’s and St. Pius X High School.

The Catholic Foundation expresses its sincere gratitude to the Maloof family for their generosity and investment in Catholic education.

Catholic Award for Teachers

Established in 1998 with an anonymous gift to the Catholic Foundation, the Catholic Award for Teachers recognizes the accomplishments of outstanding teachers in our Catholic schools. This year, three teachers were selected to receive awards of $1,000 each in appreciation for their teaching excellence. In addition, the schools they represent each receive $100 for their school endowment. Recipients of the 2012 awards are:

Bill Armijo, St. Michael’s High School
Susan Peterson, St. Therese Catholic School
JoAnne Rickard, St. Thomas Aquinas School

Our Future Priests

Did you know that The Catholic Foundation manages eight separate endowments that support the education of seminarians for the Archdiocese of Santa Fe? Many of these funds were established by individuals – through lifetime or testamentary gifts – deeply committed to building our Church through vocations. These donors, together with The Catholic Foundation and the Archdiocese of Santa Fe, are helping ensure the strength and vitality of our future Church. Will you join us?
The Catholic Foundation’s Grant Awards Luncheon is a magnificent celebration of Moving Hearts and Touching Lives, made possible by the generous and caring support of these community organizations.

$10,000 Presenting Sponsor
St. Joseph Community Health

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 wellbeing 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 to 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.

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Turn of Events

Everyone who breathes, high and low, educated and ignorant, young and old, man and woman, has a mission has a work.

St. John Neuman

Everyone who

breathes, high and low, educated and ignorant, young and old, man and woman, has a mission has a work.
<table>
<thead>
<tr>
<th>Organization</th>
<th>City</th>
<th>Proposal Summary</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albuquerque Interfaith in collaboration with Our Lady of the Most Holy Rosary, San Martin de Porres and St. Therese of the Infant Jesus Parishes</td>
<td>Albuquerque</td>
<td>These parishes, in collaboration with Albuquerque Interfaith will participate in the Workforce Ready program that helps unemployed parishioners create resumes, successfully complete on-line applications, learn how to interview effectively and practice the skills of being “public people.”</td>
<td>$7,000</td>
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<tr>
<td>Archdiocese of Santa Fe, Office of Pastoral Outreach, Thresholds</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>Archdiocese of Santa Fe, Office of Religious Education</td>
<td>Albuquerque</td>
<td>The Office of Religious Education has developed a new confirmation curriculum for all parishes. Funds will be used to purchase resource materials for catechetical leaders, youth ministers and confirmation coordinators.</td>
<td>$3,106</td>
</tr>
<tr>
<td>Archdiocese of Santa Fe, Office of the Diaconate</td>
<td>Albuquerque</td>
<td>The Diaconate Office will use the grant for the Language Acquisition Made Practical (“LAMP”) program to train deacons to communicate effectively in Spanish as well as English.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Casa Angelica</td>
<td>Albuquerque</td>
<td>Casa Angelica will use the funds to buy two Rifton chairs which can be easily adjusted to fit specific tasks, allowing clients to participate in many different activities.</td>
<td>$6,230</td>
</tr>
<tr>
<td>Catholic Charities</td>
<td>Albuquerque</td>
<td>The grant for Catholic Charities’ Career Center will be applied to a program that aims to reduce the unemployment rate for refugees and increase their household income.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Christus St. Vincent Regional Medical Center</td>
<td>Santa Fe</td>
<td>The grant will be used by the hospital’s chaplain to purchase and install a closed-circuit video camera in the chapel. The camera will broadcast the daily mass, the rosary in Spanish and English, and the Chaplet of Divine Mercy, as well as announcements of other religious services.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Estancia Valley Catholic Parish, St. Vincent de Paul</td>
<td>Moriarty</td>
<td>The program continues to see an increase in the number of people needing assistance. The grant will allow them to serve more people.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Holy Cross Catholic School</td>
<td>Santa Cruz</td>
<td>The school will use the funding to update educational software in the areas of math, science, reading and typing and to train staff.</td>
<td>$6,370</td>
</tr>
<tr>
<td>Holy Family Parish, St. Vincent de Paul</td>
<td>Albuquerque</td>
<td>Holy Family’s St. Vincent de Paul partnership with the Roadrunner Mobile Food Pantry Program has been very successful and the grant will allow them to continue their large scale food distribution.</td>
<td>$6,000</td>
</tr>
<tr>
<td>Holy Ghost Catholic School</td>
<td>Albuquerque</td>
<td>The “Holy Ghost Cares for Creation” program will start a fruit and vegetable garden with the grant, to teach students about respect for God’s creation while cultivating food to be given to needy families in their community.</td>
<td>$4,000</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>$5,000</td>
</tr>
<tr>
<td>Immaculate Conception Parish in collaboration with Samaritan House, Inc.</td>
<td>Las Vegas</td>
<td>The Social Concerns/Social Justice Ministry of Immaculate Conception Parish collaborates with Samaritan House, Inc., in serving the poor. Samaritan House provides temporary shelter, food and household assistance to the needy. Many of the program volunteers come from the two Las Vegas parishes. The grant will be applied to the food program.</td>
<td>$5,000</td>
</tr>
<tr>
<td>Norbertine Community of New Mexico in collaboration with the Ecumenical Institute for Ministry</td>
<td>Albuquerque</td>
<td>The Ecumenical Institute for Ministry provides graduate studies in theology for Catholic laity and clergy, through an alliance with St. Norbert College. The grant will allow the Institute to expand its programs.</td>
<td>$7,000</td>
</tr>
<tr>
<td>Nuestra Señora del Rosario Mission Church</td>
<td>Truchas</td>
<td>Moisture in the outside walls of the church is causing the stucco to separate and the mud walls to deteriorate. Funds will be used to build a French drain around the perimeter of the church, in preparation for the removal of the stucco and re-plastering of the walls.</td>
<td>$5,000</td>
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<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 cover the costs of serving a hot lunch three times a week.</td>
<td>$4,000</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 and rent; for the mobile food pantry and emergency food box program; and for the Senior Wellness Clinic.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Our Lady of Sorrows Parish, St. Joseph the Worker Program</td>
<td>Bernalillo</td>
<td>In partnership with Catholic Charities, St. Joseph the Worker will provide training to the unemployed, including classes in life skills, budget management, organization and communication. Funds will be used to buy four laptop computers, software, desks and supplies.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Our Lady of the Assumption School</td>
<td>Albuquerque</td>
<td>The School Garden Club will involve students in planting a seasonal fruit and vegetable garden from which produce will be distributed to clients of St. Vincent de Paul. The grant will cover supplies and other program expenses.</td>
<td>$5,000</td>
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<tr>
<td>Organization</td>
<td>Location</td>
<td>Description</td>
<td>Amount</td>
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<tr>
<td>Pastoral Counseling Center</td>
<td>Santa Fe</td>
<td>Funds will be applied to their Subsidized Services Program so that low income clients may receive counseling services.</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, utilities, food and transportation. 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>Rio Grande Food Project in collaboration with Casa Angelica, Our Lady of the Most Holy Rosary Parish and St. Pius X High School MAD Against Hunger Project</td>
<td>Albuquerque</td>
<td>The Rio Grande Food Project provides needy households with emergency food. Volunteers from Casa Angelica, the parish and the school help with packaging food and cultivating a community garden that provides food for the program. The grant will be used for food purchases.</td>
<td>$2,000</td>
</tr>
<tr>
<td>Sacred Heart of Jesus Parish, Religious Education Program</td>
<td>Espanola</td>
<td>The religious education program is being updated and the funds will allow the parish to upgrade the audio visual equipment and buy computers and related materials.</td>
<td>$3,250</td>
</tr>
<tr>
<td>Santa Clara Parish</td>
<td>Wagon Mound</td>
<td>The interior of the church will be repaired, re-plastered and repainted. All labor will be donated and the supplies will be purchased with the grant.</td>
<td>$4,040</td>
</tr>
<tr>
<td>Society of St. Vincent de Paul Thrift Store</td>
<td>Albuquerque</td>
<td>There is no St. Vincent de Paul program in the vicinity of the thrift store and many of the walk-ins ask for food. Funds will be used to buy food for the store.</td>
<td>$4,200</td>
</tr>
<tr>
<td>St. Alice Parish, St. Vincent de Paul</td>
<td>Mountainair</td>
<td>The grant will allow St. Vincent de Paul to assist fifty needy families during the winter months with heating expenses. In addition, the grant will help provide one-time only emergency cash assistance to qualified families during the winter.</td>
<td>$4,200</td>
</tr>
<tr>
<td>St. Anne Parish</td>
<td>Tucumcari</td>
<td>The youth religious education program is being updated to attract more participants. Funds will be used to purchase equipment and materials.</td>
<td>$3,050</td>
</tr>
<tr>
<td>St. Anthony of Padua Parish</td>
<td>Fort Sumner</td>
<td>This grant is for repairs to the exterior north side walls and window frames, and for plumbing to bring water into the sacristy.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Augustine Parish</td>
<td>Isleta</td>
<td>Funds will help cover the cost of cleaning and preserving the 16th century Christ of Isleta painting.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Charles Borromeo School</td>
<td>Albuquerque</td>
<td>The school will enhance the existing mathematics curriculum by adding hands-on manipulative materials and comprehensive online activities, allowing teachers to give more individual attention. The grant will be used for materials.</td>
<td>$3,250</td>
</tr>
<tr>
<td>St. Felix Pantry, Inc.</td>
<td>Rio Rancho</td>
<td>The number of families coming to St. Felix’s food distribution program continues to grow. Nutritional foods will be purchased with the funds.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Gertrude the Great Parish</td>
<td>Mora</td>
<td>Many of the families who come to the parish for help subsist on less than $700 a month. The grant will allow the parish to provide more assistance with utility bills.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Joseph Parish</td>
<td>Springer</td>
<td>The grant has been given for structural and interior church renovations, based on the highest priority needs.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Mary Magdalene Mission Church</td>
<td>Magdalena</td>
<td>As renovation of the parish hall continues, this grant will be used to repair and upgrade the bathrooms.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Mary Rest Home</td>
<td>Albuquerque</td>
<td>St. Mary Rest Home will purchase and install new, lightweight entrance doors and automated sensors, for easier access to the facility by elderly residents.</td>
<td>$7,000</td>
</tr>
<tr>
<td>St. Pius X High School, MAD Against Hunger Program</td>
<td>Albuquerque</td>
<td>The school recently completed the fourth year of this program that involves students in packaging and distributing nutritious meals to the poor. Funds will be used to buy food for the program.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Therese Catholic School</td>
<td>Albuquerque</td>
<td>The school will purchase a reading and comprehension program that inspires children to read more and a library program that allows students to search for books that fit their interest and reading level.</td>
<td>$5,000</td>
</tr>
<tr>
<td>St. Thomas the Apostle Parish, Children &amp; Youth Religious Education Program</td>
<td>Abiquiu</td>
<td>St. Thomas the Apostle Parish and its missions are developing a comprehensive program for children and youth. A Sister from the Sisters of Loretto has been recruited to organize the program and to train teachers. The grant will cover transportation and housing costs for Sister.</td>
<td>$3,500</td>
</tr>
<tr>
<td>St. Thomas the Apostle Parish, Adult Religious Education Program</td>
<td>Abiquiu</td>
<td>A Sister from the Congregation of St. Joseph has been recruited to help plan, organize and implement an adult evangelization program for the parish and its missions. The grant will cover transportation and housing costs for Sister.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Villa Therese Catholic Clinic</td>
<td>Santa Fe</td>
<td>The grant will be allocated between two programs: orthodontic treatment for uninsured and underserved adolescents; and gift cards for needy families for food, infant formula or prescription medications.</td>
<td>$6,500</td>
</tr>
</tbody>
</table>
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Donors to The Catholic Foundation give out of compassion, using their personal resources to help address needs and support ministries that move their hearts. Through their annual gifts, endowment gifts and estate gifts, our donors have made it possible for The Catholic Foundation to touch thousands of lives in every corner of the Archdiocese.

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Mr. Stephen L. Smith
Mr. and Mrs. Tony J. Strati
Mr. and Mrs. Michael T. Sullivan
Ms. Ernestina I. Tait
Mr. and Mrs. Seth T. Thomas
Lt. Col. and Mrs. John A. Tondl
USAF Ret.
Mr. and Mrs. J. Brian Trambley
Darren, Elaine, Tyler and Hilary Watson
Ms. Heidemarie Z. Weidner
The Estate of Rev. Dr. George Werner
Mr. and Mrs. Spencer Whitten

Friends of the Foundation

These are outstanding members of the community who support the activities of The Catholic Foundation.

Bank of Albuquerque, N.A.
Nancy Cusack and Larry Stoerner
Edward A. Jordan
Clovis T. Martin
New Mexico Sports and Physical Therapy
Mr. and Mrs. Luke Otero
Significance Foundation – Stephen Gibbs Family Foundation
UltiMED
U.S. Bank

Let us love one another,
Beneficiaries and Grants

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 2012, The Catholic Foundation distributed a total of $925,614 to fund works of the heart throughout the Archdiocese of Santa Fe. In addition, $291,619 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 2012, was $1,217,233.

Designated Beneficiaries
Aquinas Newman Center
Archdiocesan Catholic schools
Archdiocesan Deacons
Archdiocesan Vocations Office, for seminarians
Archdiocese of Santa Fe
Birthright of Albuquerque
Birthright of New Mexico
Boy Scouts of St. Thomas Aquinas Parish
Casa Angelica
Cathedral of St. Francis of Assisi
Catholic Charities
Catholic Schools Office
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, New Mexico
Old Guadalupe Church in Santa Fe
Our Lady of the Annunciation Parish and School
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 Guadalupe Church, Santa Fe
Our Lady of Sorrows Parish, Las Vegas
Province of Our Lady of Guadalupe – Order of Friars Minor
Queen of Heaven Parish
Queen of Heaven School
Retired, incardinated archdiocesan priests
Risen Savior Catholic Community
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, New Mexico
St. Mary’s School, Albuquerque
St. Pius X High School
St. Therese Parish
St. Therese School
St. Thomas Aquinas School
St. Vincent de Paul, Albuquerque Central Council

Beneficiaries of Donor Advised Grants
Aquinas Newman Center Building Fund
Brothers of the Good Shepherd
Cañones Early Childhood Center, Cañones
Catholic Charities Building Fund
Catholic Charities, Matthew 25 Society
Dominican Ecclesial Institute
Educate New Mexico
Holy Angels Church, Angel Fire
Holy Cross Catholic Church, Las Cruces
Little Poor One Food Pantry, Taos
Norbertine Community
Our Lady of Fatima School, for scholarships
Our Lady of Fatima School, for the library
St. Thomas Red Mass
Samaritan Counseling Center
San Diego Mission, Jemez Pueblo
San Juan Nepomuceno Parish, El Rito
St. Pius X High School
The Catholic Foundation Funds

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 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
Archbishop Robert F. Sanchez Seminary Burse
Founders Endowment

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
Founders Endowment
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
John R. Trujillo Memorial Fund
Lillian G. Watson 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 Brumell
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
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. Muhoberger 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 R. 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
Patrick Jennings Memorial Fund
Peggy and Michael Keleher Fund
Richard M. Hager Foundation Fund
Rosemary and Aldo Vaiola Fund
Stelia and Ole Pelosi 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
Archbishop’s School Fund
Archdiocesan Priests’ Retirement Fund

The Legacy League
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. Please contact The Catholic Foundation for 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” Brumell
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. Jaltbert

Archbishop Robert F. Sanchez Seminary Burs
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 Niño 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 Dillon 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 Burs
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 Niño Regional Catholic School Endowment
St. Charles Parish Endowment Fund
St. Francis Scholarship Fund
St. John Vianney Seminary Burs
St. Joseph Community Health Fund
St. Mary Rest Home 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.

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
Ms. Benita C. Zimmer
Mr. and Mrs. Raymond E. Zimmer
## Condensed Statements of Financial Position

**June 30, 2012 and 2011**

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$288,957</td>
<td>$230,654</td>
</tr>
<tr>
<td>Restricted cash</td>
<td>383,036</td>
<td>514,512</td>
</tr>
<tr>
<td>Bequest receivable</td>
<td>—</td>
<td>266,360</td>
</tr>
<tr>
<td>Furniture and equipment, net of accumulated depreciation</td>
<td>31,100</td>
<td>40,865</td>
</tr>
<tr>
<td>Prepaid and other assets</td>
<td>7,689</td>
<td>5,274</td>
</tr>
<tr>
<td>Investments in real estate</td>
<td>2,073,308</td>
<td>2,073,308</td>
</tr>
<tr>
<td>Investment in marketable securities</td>
<td>31,107,441</td>
<td>32,857,233</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$33,891,531</td>
<td>$35,988,206</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable and accrued liabilities</td>
<td>$18,860</td>
<td>$11,211</td>
</tr>
<tr>
<td>Grants distributable</td>
<td>945,731</td>
<td>788,037</td>
</tr>
<tr>
<td>Charitable remainder annuity trusts and gift annuities</td>
<td>3,798,324</td>
<td>3,800,816</td>
</tr>
<tr>
<td>Agency obligations</td>
<td>13,583,906</td>
<td>14,730,695</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>18,346,821</td>
<td>19,330,759</td>
</tr>
<tr>
<td><strong>Net Assets</strong></td>
<td>15,544,710</td>
<td>16,657,447</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$33,891,531</td>
<td>$35,988,206</td>
</tr>
</tbody>
</table>

## Condensed Statements of Activities and Changes in Net Assets

**Years Ended June 30, 2012 and 2011**

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Support and Revenues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions (net of agency, charitable gift annuity and pass-through contributions of $1,54,661 in 2012 and $170,705 in 2011)</td>
<td>$444,296</td>
<td>$540,458</td>
</tr>
<tr>
<td>Investment (loss)gain (net of agency (losses) gains of ($325,298) in 2012 and $2,652,540 in 2011)</td>
<td>(354,083)</td>
<td>2,718,046</td>
</tr>
<tr>
<td>Change in value in charitable remainder annuity trusts</td>
<td>(346,630)</td>
<td>416,510</td>
</tr>
<tr>
<td>Other income</td>
<td>165,475</td>
<td>139,571</td>
</tr>
<tr>
<td><strong>Total Support and Revenues</strong></td>
<td>(90,942)</td>
<td>3,814,585</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants and distributions (net of agency distributions of $704,953 in 2012 and $393,624 in 2011)</td>
<td>$510,977</td>
<td>507,038</td>
</tr>
<tr>
<td>Investment and administrative expenses (Net of agency expenses of $171,463 in 2012 and $188,178 in 2011)</td>
<td>$510,818</td>
<td>570,003</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>1,021,795</td>
<td>1,077,041</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net assets, beginning of year</td>
<td>16,657,447</td>
<td>13,919,903</td>
</tr>
<tr>
<td><strong>Net Assets, End of Year</strong></td>
<td>$15,544,710</td>
<td>$16,657,447</td>
</tr>
</tbody>
</table>
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 no matter which method the donor selects to establish the endowment. The Catholic Foundation recommends that a donor consult an attorney or a financial advisor for assistance in making a gift through a will.

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