

Horizons of Hope

2002 Annual Report



Catholic Foundation
of the Diocese of Green Bay

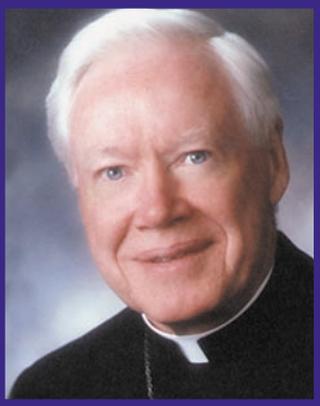
*To encourage Catholic stewardship
and generosity from donors through
endowment funding.*

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All information, donors and dollars as of June 30, 2002



**Here’s an opportunity for you to get more involved with the
Foundation. Please check out our Leadership Society!**



Dear Friends in Christ,

Changes are constant throughout a lifetime, each one an opportunity for something new. Over the next few years, the Diocese will undergo a few changes. The first

and one of the most important will be our new emphasis on Stewardship—A Way of Life. Stewardship is our opportunity to reflect on all that God has done for us out of love and a way for us to respond out of grateful love.

The Catholic Foundation is also going through some changes. A Leadership Society has been started to continue to allow the Foundation to be a catalyst in our Diocese while also giving the Foundation more of a presence throughout northeastern Wisconsin. The Catholic Foundation is an important tool in providing financial stability for our Catholic schools, parishes and the Diocese for generations to come.

I want to assure you of one thing that will not change with the Catholic Foundation. Great care is taken to ensure that gifts made to the Foundation are managed well and are used according to the donor's intention.

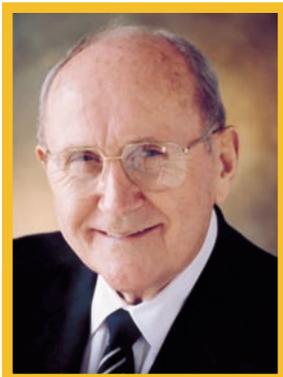
Changes are constant throughout our lives. I myself shall be going through a bit of a change in 2003. I shall turn 75 years old and am required to submit my resignation to the Holy Father. So as I retire and the Diocese welcomes a new bishop my final hope and prayer is that more people will use the Catholic Foundation as a way to leave their mark on our Church here in northeastern Wisconsin.

Sincerely yours in Christ,

A handwritten signature in black ink that reads "Robert J. Banks". The signature is written in a cursive style with a small cross at the beginning.

Most Reverend Robert J. Banks
Bishop of Green Bay

Dear Friends,



Thanks to the support of many, the Catholic Foundation has had an exciting year. In many ways this year has reshaped the Foundation. New funds have begun; the money available to organizations has doubled—reaching a grand total of \$384,116 since our inception in 1997.

The reshaping of the Catholic Foundation began in May of 2002. The Board convened a group of leaders from all areas of the Diocese to conduct a 'Vision Day' for the Foundation. This led to the formation of two major initiatives—a Leadership Society and the 'Sharing God's Gifts' major gift effort.

The Leadership Society will allow the Foundation to have an even larger presence throughout northeastern Wisconsin while also allowing us to continue to identify needs and initiate solutions to help our parishes, schools and the Diocese. The Leadership Society also puts the Catholic Foundation on firm footing for the future.

The 'Sharing God's Gifts' initiative allows best practice programs to be modeled and conducted across the Diocese. Several of these best practices have been supported with grants from the Catholic Foundation this year; you can read more about our grants in this annual report.

We have seen some wonderful expressions of Christian Stewardship during the past year—through arrangements set up in the Catholic Foundation. We encourage you to join the Leadership Society if you have not yet done so—knowing that it will allow the Catholic Foundation to help even more parishes, schools, organizations and donors throughout the Diocese.

Thank you for 'Sharing God's Gifts' through the Catholic Foundation.

Sincerely,

Donald J. Long, Sr.
President

Cindi K. Brawner
Executive Director

P.S. Double benefit! Leadership Society gifts made before June 30, 2003 will be matched dollar for dollar by area challenge grants!

President's Message



St. Ann Parish Tuition Assistance Fund

The importance of a Catholic education for children is something the parents of St. Ann Parish, St. Anna, have recognized for a long time. Two years ago, a special donor decided to help these parents by establishing an endowment fund in the Catholic Foundation to benefit families who recognize the impact Catholic education has on children.

This endowment provides tuition assistance to families of the parish. The first year's tuition assistance was provided for six children. The second year the fund grew and tuition assistance also

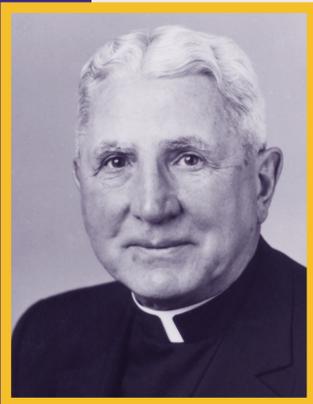
grew by 100%, helping 12 children attend area Catholic schools.

"We want to take this opportunity to thank you (the donors) from the bottom of our hearts for your generous donation for our children's Catholic education," said Dave and Sherry Winkel, parents of Kelly and Jacob.



"It is great to know that we have someone who truly believes in Catholic education and shares their contributions with all of us at St. Ann Parish who send our children to Catholic school."

—Dave and Sherry Winkel



The Bishop Wycislo Fund for Lay Ministry Formation

Training leaders for our future.

Over the past decade, the Diocese has recognized a widening gap in the number of ordained

leaders in our parishes and placement of lay leaders with qualified theological training and formation. Simply put, as the number of priests declines, leadership within our parishes also

diminishes. In 2001, the Catholic Foundation began a fund to help narrow this gap. The Bishop Wycislo Fund for Lay Ministry Formation was established to prepare parish leadership with the pastoral skills and spiritual formation necessary to guide the Church of Green Bay through the 21st century.

Currently the Commissioned Ministry Leadership Formation program has commissioned 162 ecclesial lay leaders with another

121 candidates in the program. Ideally with the proper funding the program could support 300 candidates working toward their ministry certification in the areas of Pastoral, Liturgical Ministry and Church Business Administration.

Through the Bishop Wycislo Fund for Lay Ministry Formation, donors to the Catholic Foundation are closing this gap while enhancing pastoral leadership in our parishes for the future.

Theology on Tap Grant

Sharing a beer or a soda with some friends is a common practice for young adults in northeastern Wisconsin. Doing so while discussing faith and values is perhaps not so common.

With the help of the Catholic Foundation and the Total Catholic Education Department, the Diocese of Green Bay has started a program for young adults called Theology on Tap. The purpose of this program is to give men and women in their

twenties and thirties a casual setting in which they can explore their questions about prayer, relationships and life from a faith perspective.

"We know young adults have questions about faith and many of them are also searching for a church, faith or denomination," says Sr. Peg Gabik, diocesan consultant for Adult/Young Adult Catechesis. "We want to help young adults find answers on how to live their lives and how faith can play a meaningful role."



Sarah Mancheski of De Pere said, "I really enjoyed this. The content was not over the top and a lot of questions were answered. This is a great program and Green Bay needed this! Thank you."



The Catholic Foundation strives to identify programs that allow collaboration and sharing. Through a grant to Catholic Charities' Hispanic Outreach, the Foundation identified a program that truly emphasizes sharing.

Hispanic Family Day Celebration Grant

Nearly 400 people attended a family day celebration that brought two cultures together to share their unique traditions. The family day event featured Mexican and American food, Nativity Christian Clowns, music and dancers.

"This type of event helps to break the ice even if we don't speak each other's language. We can still smile and laugh together and celebrate family," said Sr. Guadalupe Munoz, Catholic Charities Hispanic Outreach. "It was vital that we included both the Hispanic and Anglo communities. Bringing one

without the other wouldn't be complete. So much can be accomplished if we continue to work together as one community instead of two."

Jeff and Ann Harpt decided to bring their children because it was an opportunity for them to experience a new culture.

"The Hispanic community has a lot to share about the way they honor their families and how they worship," Ann Harpt said. "This day also gave us a chance to celebrate our family."

Fund Descriptions

Unrestricted "Greatest Needs" Funds

Greatest Needs Fund

Established in 1998 and given in honor of Bishop Robert J. Banks, this fund serves as the general fund, and all gifts to the Foundation that are not restricted become part of this fund. The Bishop decides which areas of greatest need will receive distributions from this fund.

Diocesan Needs Fund

Established by a generous bequest to the Bishop's Appeal, this fund supports the on-going operation of Diocesan programs and services.

Operating Expense Fund

Supports the Catholic Foundation's on-going operation.

Education

All Saints Catholic School Endowment Fund, Antigo

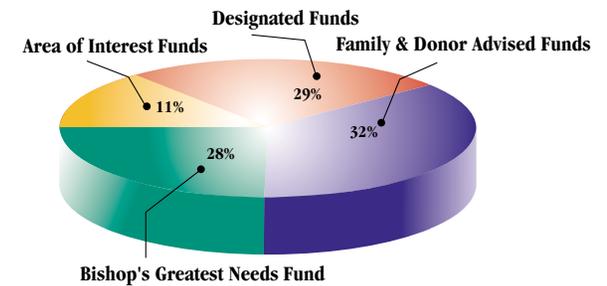
The students of the All Saints Catholic School System benefit from this fund.

Catholic Elementary Schools Fund

Benefits Catholic elementary schools in the Diocese of Green Bay.

Christmas Stars Scholarship Fund, Appleton

Established to support the fine arts programs of Appleton Catholic Educational System (ACES) and Xavier High School, this scholarship program benefits students who are involved in the fine arts.



Types of Funds within the Catholic Foundation

Norbert Koeppl Scholarship Fund for St. Joseph Parish, Phlox

Benefits confirmed members of the parish who are pursuing a post-secondary education.

Notre Dame de la Baie Fund, Green Bay

The programs and operations of Notre Dame de la Baie High School benefit from this fund established by the Long Family.

Paul & Carol Schierl Fund

Benefits Catholic elementary schools by providing tuition assistance to low-income, minority or other children needing assistance to attend Catholic grade schools.

St. Ann Parish Fund, St. Anna

Provides Catholic school tuition assistance for families of St. Ann's Parish.

St. Anthony Catholic School Fund, Oconto Falls

Established for the greatest needs of St. Anthony Catholic School.

Total Catholic Education Fund

Established by an individual to benefit religious education programs and Catholic schools in the Diocese of Green Bay.

Unified Catholic Schools of Oshkosh Fund

The Unified Catholic Schools of Oshkosh and its students benefit from this fund.

Services

Jeanette K. Clark Fund

Established through a generous bequest for children's services within the Apostolate.

Catholic Charities Fund

An anonymous individual established this fund to bolster the many outreach programs of Catholic Charities.

Nazareth Fund

This fund, for the benefit of children and families, established by Bishop Robert J. Banks through a generous bequest from the Jeanette K. Clark estate.

Regina & Dominic Olejniczak Family Fund

Established by the Olejniczak Family, benefits the Adoption Services program of Catholic Charities of the Diocese of Green Bay.

St. Patrick's Food Program Fund, Green Bay

For the care of the poor who are served by St. Patrick Parish, established by the Long Family.

Paul's Pantry Fund, Green Bay

The poor served by Paul's Pantry are the beneficiaries of this fund, established by the Long Family.

Poor and Homeless Fund

Established through a Charitable Gift Fund for the poor and homeless of the Diocese.

Camp Tekawitha Fund

Established for the greatest needs of Camp Tekawitha, including camperships, programming or building needs.

A gift of any amount will be graciously accepted and added to the fund of your choice. A new fund may be established upon a donor's request.

Ministry

Health and Welfare Fund of the Discalced Carmelite Nuns, Carmel of the Holy Name of Jesus

For the ongoing support and care of the Discalced Carmelite Nuns, Carmel of the Holy Name of Jesus; made possible through the generosity of the Premonstratensian Fathers, St. Norbert Abbey in De Pere.

Holy Angels Parish General Fund, Darboy

Established to benefit the greatest needs of the parish.

Holy Family Parish Building Fund, Brillion

Established to encourage the construction of a new school within 10 years and/or a new rectory within 5 years.

Seminarians' Fund

Established through a generous bequest from the Marcella T. Greuel estate, this fund assists needy young men studying for the priesthood.

St. Anthony Parish Fund, Oconto Falls

Established for the greatest needs of the parish.

St. Thomas the Apostle Parish Fund, Humboldt

Established to benefit the operations of the parish. A generous bequest of a former parishioner of Ss. Cyril & Methodius Parish, one of the two parishes which merged to form St. Thomas the Apostle Parish, made this fund possible.

Clarence & Dolores Wallace Fund

Benefits the Mount Tabor Center, Menasha.

Bishop Wycislo Fund for Lay Ministry Formation

To supplement tuition and book costs to benefit those students who are enrolled in Diocesan Lay Ministry Formation Programs.

Donor Advised Funds

Catholic Woman's Club of Green Bay Donor Advised Fund

Established to promote Catholic giving of the Catholic Woman's Club of Green Bay.

Goldie & Ethel Derenne Fund for Charity

Established to carry on a tradition of giving to Catholic and community charitable activities.

Long Family Fund for Catholic Charity

Provides support to a variety of Catholic causes.

Pass-Through Fund

Temporary funds used to make immediate grants to other eligible charities.

Paul J. & Carol A. Schierl Donor Advised Fund

Established to facilitate the Schierl Family charitable giving for Catholic endeavors.

The Arthur & Gladys Schmidt Family Fund

Established to facilitate the Schmidt Family charitable giving.

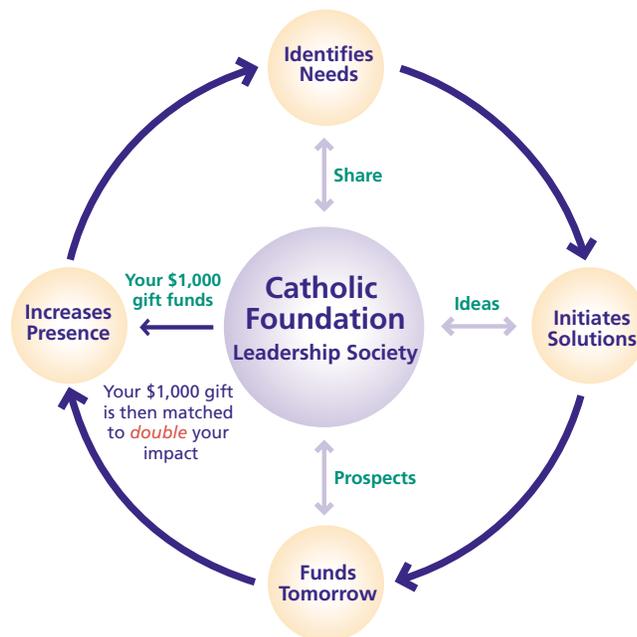
Schmidt Family Donor Advised Fund

Provides support to the needy of the Diocese of Green Bay.

Joseph & Sarah Van Drisse Donor Advised Fund

Established to honor the memory of Joseph & Sarah Van Drisse, this fund benefits many Catholic causes in the Diocese of Green Bay.

A gift of \$50,000 payable over five years allows you to name a fund in honor or memory of a loved one.



The Leadership Society

The Leadership Society of the Catholic Foundation is an opportunity for people who believe in the mission of the Foundation to invest in its growth. The Society allows the Foundation to increase its presence throughout the Diocese. This in turn helps identify needs and best practices in our local parishes and schools and then initiate and share these solutions throughout the Diocese.

Please prayerfully consider making a gift of \$1,000 to the Catholic Foundation Leadership Society. This year the first 150 Leadership gifts will be matched by area challenge grants.

For more information, please contact Cindi Brawner at 920-437-7531 or toll-free at 877-500-3580 ext. 8173.

Organizations Who Received Grants & Distributions for 2001-2002

Unrestricted

Holy Name Retreat House—Quo Vadis	\$25,000.00
Green Bay Catholic Diocese	13,705.40
Green Bay Diocese Bishop's Appeal	1,267.00
	<u>\$39,972.40</u>

Education

Total Catholic Education—Theology on Tap	\$1,039.00
Total Catholic Education—	500.00
Young Adult Service Retreat	
All Saints School, Antigo	750.99
Appleton Catholic School System—	998.44
Fine Arts Program	
Appleton Xavier High School—Fine Arts Program	998.44
Notre Dame de la Baie Academy, Green Bay	2,793.81
St. Ann Parish, St. Anna	4,598.12
Catholic Elementary Tuition Assistance	
St. Anthony Catholic School, Oconto Falls	3,917.29
Unified Catholic Schools of Oshkosh	2,570.14
St. Joseph Parish, Phlox—	1,500.00
Secondary Education Tuition Assistance	
Catholic Elementary Schools Teacher	2,921.72
Recruitment, Green Bay	
	<u>\$22,587.95</u>

Services

Catholic Charities—Catholic Schools Social Services	\$7,500.00
Catholic Charities—Hispanic Outreach Programs	5,400.00
St. Joseph Parish, Wautoma—Hispanic Ministry	2,500.00
Pastoral Services—Hmong American	1,000.00
National Catholic Association	
Newman Center, Oshkosh Alternative	1,000.00
Spring Break Program—College Level	
Paul's Food Pantry, Green Bay	10,206.81
St. Patrick Parish Food Program, Green Bay	9,695.20
	<u>\$37,302.01</u>

Ministry

Vocations Dept.—Spanish	\$4,000.00
Language/Culture Immersion Program	
Vocations Dept—World Youth Day	1,000.00
Carmel of the Holy Name of Jesus	2,171.96
Holy Angels Parish, Darboy	1,127.31
St. Anthony Parish, Oconto Falls	3,279.88
St. Thomas the Apostle Parish, Humboldt	2,430.15
Mt. Tabor Retreat Center, Menasha	3,014.91
	<u>\$17,024.21</u>

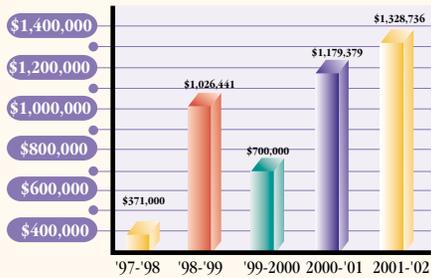
Donor Advised

Heritage Hill—Bark Chapel	\$1,000.00
Salvatorian Mission Warehouse, New Holstein	1,000.00
St. Anthony Parish, Neopit	1,000.00
Encompass Child Care, Green Bay	500.00
Sisters of St. Francis, Bay Settlement	500.00
Sisters of Our Lady of Charity, Green Bay	500.00
Paul's Pantry, Green Bay	500.00
Brown County Literacy Council	425.00
St. Patrick's Parish, Green Bay	500.00
St. Norbert College Young Artists, De Pere	250.00
Green Bay Botanical Garden—Children's Area	250.00
Brown County Aging Resource Center Health Room	450.00
Families of Children with Cancer, Inc.	200.00
Love Life Program at St. Joseph Parish, Green Bay	425.00
Notre Dame de la Baie Endowment Fund	8,000.00
Sinsinawa Dominicans	8,000.00
Carmelite Monastery of the Holy Name of Jesus	8,000.00
St. Rosalia Parish, Sturgeon Bay	1,500.00
Green Bay Diocese Bishop's Appeal	1,500.00
St. Matthew Parish Building Fund, Green Bay	6,489.69
Catholic Foundation Operating Fund*	5,000.00
	<u>\$45,989.69</u>

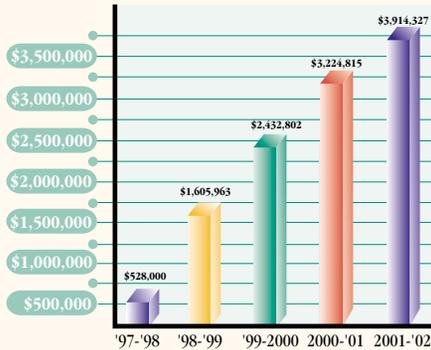
*Does not include a special grant to the Catholic Foundation operating expenses in the amount of \$61,645.74

Total Distributions

\$162,876.26



Contributions to the Catholic Foundation



Cumulative growth of the Catholic Foundation



Approved grants and distributions from the Catholic Foundaiton

Condensed Statement of Financial Position

June 30, 2002, 2001, 2000

	2002	2001	2000
Assets			
Investments	\$3,558,053	\$3,224,815	\$2,432,802
Gifts receivable	336,274	-	-
Prepaid expenses	20,000	-	-
	<u>\$3,914,327</u>	<u>\$3,224,815</u>	<u>\$2,432,802</u>
Liabilities			
Funds due to the Diocese of Green Bay	\$92,785	\$100,675	\$117,713
Other liabilities	-	10,150	-
Accrued expenses	1,183	337	713
	<u>93,968</u>	<u>111,162</u>	<u>118,426</u>
Net assets			
Unrestricted net assets	27,784	40,581	127,915
Temporarily restricted net assets	1,699,975	980,472	431,416
Permanently restricted net assets	2,092,600	2,092,600	1,755,045
	<u>3,820,359</u>	<u>3,113,653</u>	<u>2,314,376</u>
Total liabilities and net assets	<u>\$3,914,327</u>	<u>\$3,224,815</u>	<u>\$2,432,802</u>

Condensed Statement of Activities

June 30, 2002, 2001, 2000

	2002	2001	2000
Revenues, Investment Gains & Other Support			
Contributions	\$1,328,736	\$1,179,379	\$700,735
Total return on investments	(276,631)	(213,183)	181,539
	<u>1,052,105</u>	<u>966,196</u>	<u>882,274</u>
Expenses			
Grants	\$224,522	\$56,200	\$79,184
Management and general	43,557	19,573	8,616
Fund raising	77,320	91,146	53,032
	<u>345,399</u>	<u>166,919</u>	<u>140,832</u>
Change in Net Assets	<u>\$706,706</u>	<u>\$799,277</u>	<u>\$741,442</u>

A complete audited financial statement is available on request

Credits

The Catholic Foundation gratefully acknowledges the following for their support of this Annual Report:

Conard Creative Group LLC

Catholic Foundation Staff

Cindi K. Brawner, Executive Director

Josh Diedrich, Marketing Specialist

Jan Compton, Secretary

Catholic Foundation of the Diocese of Green Bay

1910 S. Webster Ave., P.O. Box 23825

Green Bay, WI 54305-3825

Telephone: 920-437-7531 or 877-500-3580 ext. 8173

Fax: 920-435-1330

E-mail: cbrawner@gbdioc.org

www.gbdioc.org

The Catholic Foundation of the Diocese of Green Bay, Inc. Federal Tax ID # EIN 39-1924921

The material contained herein is not intended as legal advice or a substitute for such advice. The rules and regulations governing charitable Endowments and Planned Gifts are numerous and quite complex. The Catholic Foundation of the Diocese of Green Bay, Inc. recommends that anyone planning to make a contribution seek professional counsel which may be obtained from a lawyer, certified public accountant, trust officer and life insurance and investment professional who has experience and knowledge in estate and financial planning. Your gift is tax deductible to the extent allowed by law, as the Catholic Foundation of the Diocese of Green Bay, Inc. is a Tax Exempt Organization under section 501 (c)(3) of the Internal Revenue Code, pursuant to United States Catholic Conference Group Exemption.