

2003 Annual Report

Sharing God's Gifts

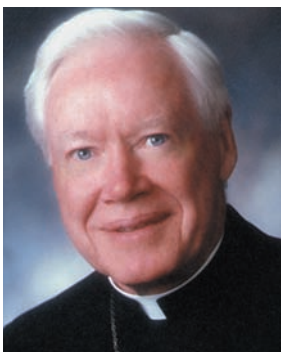


Catholic Foundation
of the Diocese of Green Bay

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

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All information, donors and dollars as of June 30, 2003



Dear Friends in Christ,

Over the course of a lifetime there are many opportunities to share our gifts from God and make a difference in the life of someone else. As I reflect back on my 13 years as Bishop of the Diocese of Green Bay, I have seen many moments where people throughout Northeastern Wisconsin have made that difference!

One special way Catholics have “Shared God’s Gifts” is by setting up a fund in the Catholic Foundation. Currently the Foundation has over 45 funds which are used to enhance the diocesan efforts in the areas of Education, Service and Ministry. These funds make a difference in the lives of thousands of people every year.

There are two simple ways you can help. The first is by joining the Catholic Foundation Leadership Society and the second is by remembering the Foundation in your will. With your help we can impact the lives of thousands.

As I enjoy my new role as retired Bishop of the Diocese of Green Bay, my hope and prayer is that you will join me and our new Bishop, the Most Reverend David Zubik, in making the Catholic Foundation an even more solid base for carrying out the mission of Jesus Christ here in Northeastern Wisconsin.

Thank you for all your support of the Foundation. May God bless you and all your loved ones.

Sincerely yours in Christ,

A handwritten signature in black ink that reads “+ Robert J. Banks”. The signature is written in a cursive, flowing style.

Most Reverend Robert J. Banks

Bishop Emeritus of the Diocese of Green Bay

Dear Friends,



This past year has been one of transitions for the Church as a whole, the Diocese and the Catholic Foundation. The highlights of the year include reaching \$5,000,000 in assets, holding 49 funds in the areas of Education, Services and Ministry, and most importantly giving \$182,861 in grants and distributions to help thousands of people and organizations across the Diocese of Green Bay. The Leadership Society has grown to over a hundred members, this growth guarantees the message of the Catholic Foundation will spread across the Diocese. We are excited by the possibilities of the future and have a challenge to encourage the faithful to see beyond the horizon with hope!



The first five years of the Foundation demonstrated a growing interest and understanding of **Sharing God's Gifts** through endowment and major gift giving. Parishes, schools, Catholic organizations and the Diocese have been active participants in this long-term effort to secure the financial future of the Church we love so much.

The coming year begins with a new bishop, Most Reverend David Zubik to carry on the wonderful tradition of giving begun by Bishop Robert Banks.

The Catholic Foundation will also have a new leader as Michael Ariens steps up to the helm to become the second President of the Catholic Foundation. It is time for new leadership to move the Foundation into new and exciting roles, collaborating with many strong partners in our work.

We invite each of you to consider the role you may play in the Catholic Foundation—become a member of the Leadership Society or start a permanent legacy through a named fund. As a professional advisor, encourage your clients to consider a charitable gift as they finalize their estate plans. As a Catholic organization, establish a fund to add stability to your future with a permanent funding opportunity.

Please consider **Sharing God's Gifts** by participating more fully in the Catholic Foundation. God bless you and all those whom you love,

A handwritten signature in dark ink, reading "Donald J. Long, Sr." in a cursive style.

Donald J. Long, Sr.
President

A handwritten signature in dark ink, reading "Cindi K. Brawner" in a cursive style.

Cindi K. Brawner
Executive Director

Seminarian Studies Hispanic Culture

"This is how one should regard us. As servants of Christ and stewards of the mysteries of God" – Cor. 4:1.

For Joel Sember, priesthood has service at its core. The priesthood is a vocation to serve Christ in a special way. Priests are God's messengers, bringing the Gospel to the world.

Last year, Joel traveled to Guadalajara, Mexico for a Spanish language and cultural immersion program. During Joel's eight-week stay he improved his knowledge and use of the Spanish language. He also learned more about the Mexican culture by going on school sponsored tours and attending lecture activities.

"Immersion programs can play a crucial role in preparing a seminarian who plans to serve our growing Hispanic population here in Northeastern Wisconsin. I am so pleased that we have a fund in the Catholic Foundation that provides training programs for our seminarians like Joel," Fr. Doug LeCaptain, Director of Vocations for the Diocese of Green Bay.



Doing The Right Thing ...

Ethel Derenne was a spry, tiny woman in her mid-80s. She loved her family and friends, her geraniums, her garden, polka dancing and St. Louis Parish in Dykesville. Although she was almost blind, Ethel took care of her house and her yard until shortly before her death. She worked hard all her life and wanted to make sure she 'did the right thing' with the money she and her late husband, Goldie accumulated during their lifetime.

Ethel learned of the Catholic Foundation from her parish priest. After Ethel took care of her family and friends, she decided to help out her parish and a number of other Catholic organizations that were close to her heart. Ethel set up two funds—one for the sole benefit of St. Louis Parish; and the other named to honor the memory of her husband and herself that would help a number of Catholic organizations with an annual gift that will continue for the next 50 years!

Sr. Marlene Dimmerling, the parish director at St. Louis Parish says,

"Ethel was a very generous and thoughtful person who had a deep concern for the poor and needy. Her deep faith was evidenced by her frequent attendance at Mass and the thousands of rosaries she prayed. Her generous spirit will live on in this parish for years to come. We are grateful that she remembered the Parish in this wonderful way."

Hola!

This is now my 5th day in Mexico and things are going very well. I get up between 6:30-7:00 am. My house mother serves me breakfast around 7:30, almost always corn flakes, papaya, and a muffin with some kind of fruit juice.

There are about 12 students at the school right now with more coming next week. I have a grammar class from 9:00 am - 1:00 pm with a quite elderly widow, slow and systematic, who also teaches English in schools.

Then I go back to my house for the big afternoon meal, called "la comida" (the food). It is always soup and bread, followed by a main course with plenty of fresh vegetables, and finally a dessert (always something fruity).

Conversation classes in the afternoon are from 4-6. I have a young teacher who speaks very quickly. We end up talking a lot about politics, the city, the United States, and whatever else. Back home I have a small dinner and am usually in bed around 10:30.

I hope everyone is doing well at the end of June. God bless.

En la familia de Dios,
Joel Sember

Stewardship Conference Impacts Parish Leaders

Last October a grant from the Catholic Foundation gave a shot of excitement to the *Stewardship—A Way of Life* movement across the Diocese. Over 40 parish representatives took three intense days in Chicago to learn more about Stewardship at the 2003 International Catholic Stewardship Conference (ICSC).

Speakers ranging from parish leaders to diocesan directors of stewardship, imparted their knowledge, experiences and best practices on Stewardship to almost 1,700 people from throughout the world.

“I have received incredible information and insights I would not have obtained on my own. I will bring this knowledge back to my parish as we

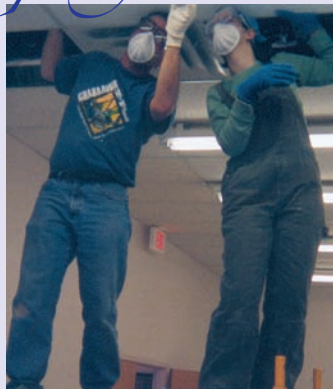
plan the year for *Stewardship—A Way Of Life*,” said John Schober, St. Joseph Parish in Appleton.

“I cannot wait to take what I have learned and put it into action in my parish. Thanks again for the wonderful experience,” said Lynn Henricks, St. John Parish in Antigo.

The Catholic Foundation of the Diocese of Green Bay was able to offer one tuition scholarship for each parish that chose to send a representative. “It is through the generosity of the Follett Family Stewardship Fund and the Starboard Media Foundation Fund, sponsor of Relevant Radio, this was made possible,” said Cindi Brawner, Executive Director of the Catholic Foundation.



Students Enjoy an 'Alternative' Spring Break



For the typical college student spring break means “fun in the sun,” but for a few students from University of Wisconsin–Green Bay and University of Wisconsin–Oshkosh it means carrying out Christ’s mission to help those in need. These students chose to take an Alternative Spring Break.

They went to Pearisburg, VA and Mississippi to help build a Habitat for Humanity house, put a deck on an adult day care facility, and install a merry-go-round in a local park, among other projects.

“It’s about stretching people’s comfort zones and living the faith,” says Laurie Svatek, campus minister from UW Green Bay. “For a lot of students this is their first experience with poverty. And unless you’ve experienced it, it’s hard to know its impact.”

“I am no longer the person I was before I left. Now I recognize how blessed I am, and instead of complaining about how bad life is, I think of the people of Pearisburg and realize that I’m pretty lucky. Thanks for changing my life,” said one student.

Through a grant from the Catholic Foundation, the Alternative Spring Break program is able to offer college students this once in a lifetime opportunity.

What Can I Give?

Outright Gifts

Cash
Appreciated Stocks
Securities

Deferred Gifts

Charitable Trusts
Gift Annuities
Bequests

Other

Real Estate
Life Insurance

- Purchase New Policy
- Change Beneficiary on Existing Policy

Board of Directors

Michael Ariens
Brillion

Deacon Jim Asmuth
Neenah

Bishop Robert Banks
Diocese of Green Bay

Msgr. John Dewane
Diocese of Green Bay

Alfred Ganther, Jr.
Oshkosh

Judy Howald
De Pere

Lewis Konop
Green Bay

Mardell Liethen
Green Bay

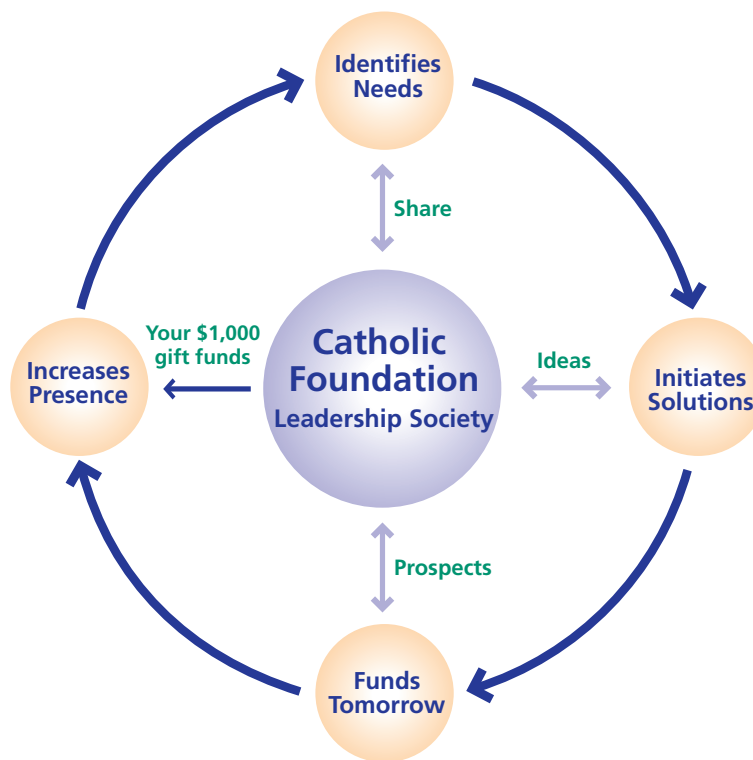
Donald J. Long, Sr.
De Pere

Bishop Robert Morneau
Diocese of Green Bay

Paul Schierl
Green Bay

Arthur Schmidt
Combined Locks

Marianne Van Drisse
Green Bay



The Leadership Society

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

Please prayerfully consider making a gift of \$1,000 to the Catholic Foundation Leadership Society. For more information, please contact Cindi Brawner at 920-437-7531 or toll-free at 877-500-3580 Ext. 8173.

Fund Descriptions

UNRESTRICTED “GREATEST NEEDS” FUNDS

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.

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.

Operating Expense Fund

Supports the Catholic Foundation’s on-going operation.

DONOR ADVISED

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.

Manuel & Alice Falk Fund for Catholic Charity

This fund is designed to carry on a tradition of giving to Catholic and community charitable activities, and in recognition of the parents of the Donor.

Mark & Sally Follett Family Stewardship Fund

A fund established by Mark and Sally Follett, in honor of St. Joseph the Worker, and in

gratitude for their many blessings. It is part of their mutual commitment to support one another in adopting a Stewardship way of life through prayer, service and sharing.

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.

Arthur and Gladys Schmidt Family Donor Advised Fund

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

Relevant Radio Christian Outreach Fund

This fund is designed to help Starboard Network serve in the mission of Jesus Christ by establishing community Catholic radio and providing relevant programming to educate, inform, inspire and build a new civilization of love.

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 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.

EDUCATION

All Saints Catholic School Endowment Fund, Antigo

Students of the All Saints Catholic School 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.

Fr. Donald Fuller Fund for Holy Angels

Established through a generous bequest from the estate of Fr. Donald Fuller. To be used by Holy Angels School as determined by the principal and Total Catholic Education Board.

Norbert Koepfel 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.

Open Skies Education Initiative Fund

Provides education scholarships for underprivileged children.

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.

Paul & Carol Schierl Catholic School Tuition Fund

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

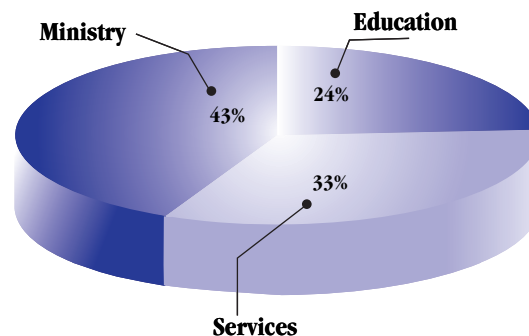
Total Catholic Education Fund

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.

Breakdown of the Designated Funds



Please consider leaving a lasting legacy so the Catholic tradition will be available to all future generations. If you have remembered the Catholic Diocese of Green Bay in your will or estate plans, please let us know so we can thank you.



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.

Affordable Housing Institute

This fund was established by the Long Family to enhance the availability of affordable housing and home ownership in the greater Green Bay area.

Monica Meyer Fund for Respect Life

Established by a generous bequest from the Monica Meyer Estate to start a Respect Life Anti-Abortion Program in the Diocese of Green Bay.

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, De Pere.

Holy Angels Parish General Fund, Darboy

Established to benefit the greatest needs of the parish.

Holy Angels Parish Stained Glass Window Fund, Darboy

This fund was established for the upkeep of the Parish stained glass windows.

Holy Family Parish Building Fund, Brillion

Established for future building needs of the parish.

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.



St. Willebrord Parish Pass Through Fund

This fund is established for capital needs and on-going programming needs of the Parish.

Monica Meyer Fund for the Education of Priests

Established by a generous bequest from the Monica Meyer Estate for the education of Priests in the Catholic Diocese of Green Bay.

St. Francis & St. Mary Parish Fund, Brussels

This fund is established for the greatest needs of St. Francis and St. Mary Parish, Brussels.

St. Francis Xavier Cathedral Fund, Green Bay

This fund is established by Donald and Darlene Long for the benefit of the Bishop Aloysius Wycislo Center's greatest needs. Once the center is debt-free, the Cathedral may use the annual proceeds wherever needed.

R.J. & Bernice Baudhuin Estate Fund for the Holy Name Retreat House

This fund is established through the generosity of the R.J. & Bernice Baudhuin estates to benefit the Holy Name Retreat House on Chambers Island.

Grants & Distributions 2002-03

Unrestricted

Virtus Program	\$37,589.50
Bishop's Appeal	2,334.44
	<u>\$39,923.94</u>

Education

Total Catholic Education—Young Adult Ministry	\$240.00
Service Retreat	
Total Catholic Education—Young Adult Ministry	925.00
Theology on Tap	
Total Catholic Education Matching Gift Program	3,000.00
All Saints School, Antigo	1,927.00
Appleton Catholic School System—Fine Arts Program	1,077.04
Appleton Xavier High School—Fine Arts Program	1,077.04
Notre Dame de la Baie Academy, Green Bay	3,145.89
St. Ann Parish, St. Anna—Catholic Elementary	
Tuition Assistance	4,671.70
St. Anthony Catholic School, Oconto Falls	3,185.15
Unified Catholic Schools of Oshkosh	4,620.72
St. Joseph Parish, Phlox—Secondary Education	
Tuition Assistance	3,000.00
St. Mary Parish, Oshkosh/St. Philip Parish,	
Green Bay Hispanic Scholarships	2,000.00
Camp Tekawitha Scholarship Program	1,171.00
	<u>\$30,040.54</u>

Services

Catholic Charities—Adoption Services	\$1,613.00
Catholic Charities—Hispanic Outreach Program	5,000.00
Campus Ministry—Alternative Spring Break Program—	1,284.00
UWGB Students	
Pastoral Services—Hmong American National	1,500.00
Catholic Association	
Pastoral Services—Hmong Faith Formation and Leadership	1,500.00
Paul's Food Pantry, Green Bay	9,529.25
St. Patrick's Food Program	8,811.14
Affordable Housing Institute	19,934.00
	<u>\$49,171.39</u>

Ministry

Vocations Dept—Spanish Language/Culture	\$5,784.00
Immersion Program	
Carmel of the Holy Name of Jesus	1,895.94
Holy Angels Parish, Darboy	2,219.44
St. Anthony Parish, Oconto Falls	2,716.72
St. Thomas the Apostle Parish, Humboldt	3,649.77
Mt. Tabor Retreat Center, Menasha	3,684.76
Pastoral Services—Prison Ministry	1,500.00
	<u>\$21,450.63</u>

Donor Advised

Heritage—Bark Chapel	\$500.00
Salvatorian Mission Warehouse, New Holstein	1,000.00
St. Anthony Parish, Neopit	1,000.00
Sisters of St. Francis, Bay Settlement	500.00
Paul's Pantry, Green Bay	500.00
St. Patrick's Food Program	500.00
Brown County Literacy Council	425.00
St. Norbert College Young Artists	250.00
Love Life Program—St. Joseph Parish Green Bay	425.00
Zambia Project	400.00
Camp Tekawitha	500.00
Notre Dame de la Baie Endowment	10,000.00
Sinsinawa Dominicans	10,000.00
Carmelite Monastery of the Holy Name of Jesus	10,000.00
St. Matthew Parish Building Fund, Green Bay	5,000.00
Notre Dame de la Baie Academy	2,584.00
St. Michael School Project—Fond Jean-Noel, Haiti	1,000.00
	<u>\$44,584.00</u>

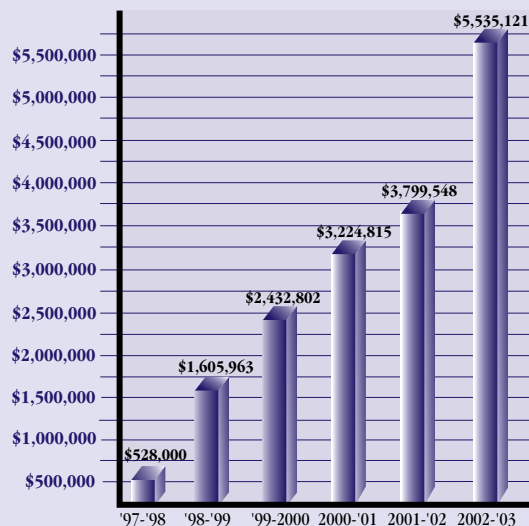
\$185,170.50

Additional distributions from Catholic Women's Club

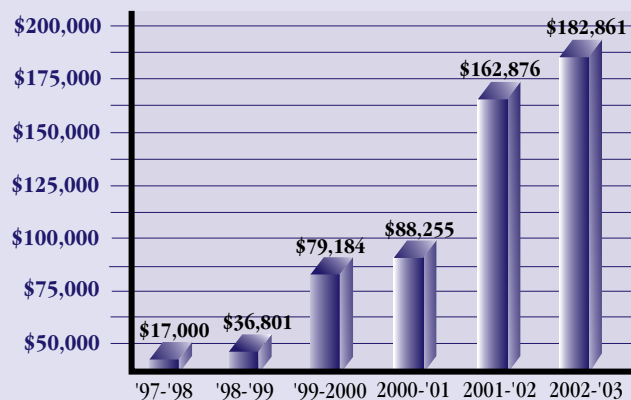
(\$2,309.29)

Total Catholic Foundation Distributions

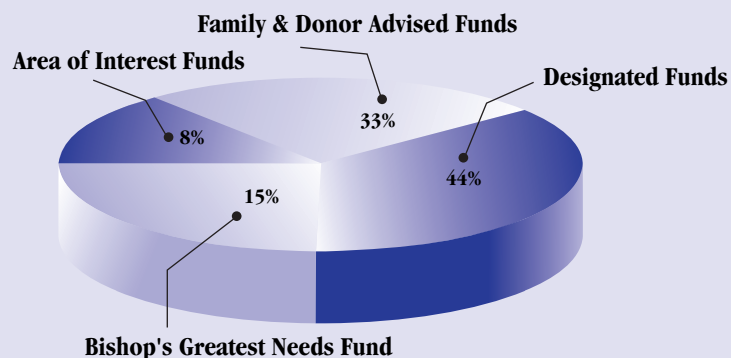
\$182,861.21



Cumulative growth of the Catholic Foundation



Approved grants and distributions from the Catholic Foundation



Types of Funds within the Catholic Foundation

Condensed Statement of Financial Position

June 30, 2003

Assets

Investments	\$4,436,924
Gifts receivable916,729
Other181,468
	<u>\$5,535,121</u>

Liabilities

Funds due to the Diocese of Green Bay	\$102,082
Accrued expenses and other11,770
	<u>113,852</u>
Net assets	<u>5,421,269</u>

Total liabilities and net assets **\$5,535,121**

Condensed Statement of Activities

June 30, 2003

Revenues, Investment Gains &

Other Support

Contributions	\$2,038,306
Total return on investments94,083
	<u>2,132,389</u>

Expenses

Grants	\$182,861
Management and general225,951
Fund raising101,856
	<u>510,668</u>

Change in Net Assets **\$1,621,721**

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

Elizabeth Bauer, Intern

If you would like to schedule a private, confidential
consultation on charitable giving, please call Cindi Brawner
at 920-437-7531, Ext. 8173.



Catholic Foundation
of the Diocese of Green Bay

Catholic Foundation of the Diocese of Green Bay

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Green Bay, WI 54305-3825

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Fax: 920-435-1330

E-mail: cbawner@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.