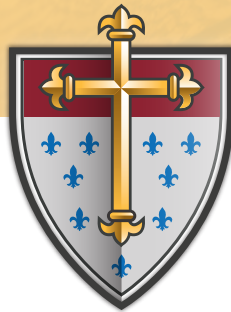




This is what a legacy looks like



Roman Catholic Foundation  
*of*  
EASTERN MISSOURI

2 0 1 5   R E P O R T   T O   T H E   C O M M U N I T Y

Dear Friends,

It is our privilege to be the first co-chairs of the Board of Trustees of the Roman Catholic Foundation of Eastern Missouri. We and our fellow board members believe that the Roman Catholic Foundation is doing important work on behalf of the local Catholic community. As you read this annual report, we hope you agree!

As an independent 501(c)(3) public charity, the Foundation is legally separate from the Archdiocese of St. Louis. Our active and engaged Board of Trustees, comprised entirely of Catholics, provides oversight to the Foundation's professional staff. Honoring the unique vision of each donor is central to our mission, so donors can be confident that their favorite parish, school, or ministry will receive the intended benefit. To ensure that every aspect of our mission supports Catholic values, we have retained Graystone Consulting, a business of Morgan Stanley, as our investment consultant to conduct moral and social screening of all investments.

The Roman Catholic Foundation grew quickly and achieved much in its first year of operation, thanks to the generosity of our donors. We also recognize our volunteer Board and especially the committee chairs for their great work. We don't take for granted the important role they have in developing a solid base for the Roman Catholic Foundation. Finally, our management team, led by Mark Guyol with assistance from Suann Fields, Michael Weisbrod and April Esenwah, has developed an effective business model to support the early success of the Foundation.

Our Foundation is committed to serving you and your family in developing a charitable giving strategy that meets your goals. If you are passionate about the future of our local Catholic Church, we ask you to prayerfully consider working with the Roman Catholic Foundation to support an existing legacy or create a new one.

Sincerely,

*Nancy Ross      Don Ross*

Nancy and Don Ross  
*Co-Chairs, Board of Trustees*





Dear Friends,

The Foundation's first full year of operation has been a busy one! The *Beyond Sunday* campaign is well on the way toward its goal of raising \$100 million to invest in our parish communities and transform Catholic education throughout the Archdiocese of St. Louis.

In addition to *Beyond Sunday*, the Foundation assisted Catholic donors in realizing their philanthropic visions by establishing funds for such activities as restoring pews at the Cathedral Basilica, providing operating support to Marygrove, and commemorating a deceased loved one by awarding scholarships to students at Bishop DuBourg High School.

The year ahead promises even more opportunities to grow in service. Through the *Beyond Sunday* Education Fund, we anticipate that over 1,100 students will receive a scholarship to attend the Catholic school of their choice for the 2016-17 school year! In our role as the planned giving partner of the parishes, schools, and ministries of the Archdiocese of St. Louis, we are excited to introduce legacy planning seminars, wherein donors can learn more about estate planning and how to leave a Catholic legacy. Finally, we would like for every parish, school, and ministry in the archdiocese to establish an endowed fund with the Foundation.

On behalf of the Roman Catholic Foundation of Eastern Missouri, thank you to everyone who has supported our mission. As servants of the local Catholic community, we are mission-driven, donor-focused, accountable, and transparent. We encourage you to visit our website at [rcfstl.org](http://rcfstl.org) to learn more about our efforts to ensure a vibrant Catholic future.

Gratefully,

Mark J. Guyol  
*President & CEO*





# Who Are We?

## We Are:

- Assisting families and donors by connecting them with their Catholic philanthropic interests.
- Strengthening and equipping archdiocesan ministries with expertise and support for attracting planned gifts.
- Collaborating with Catholic leaders and development professionals to maximize their efforts and build long-lasting security for their mission.

## We Are:

- Mission Driven
- Professional
- Servants
- Joyful
- Donor Focused
- Accountable
- Transparent

*We are the Roman Catholic Foundation of Eastern Missouri.*

# Turni

*We are inspiring giving and connecting donors to Catholic ministries, sustaining the local Church for future generations.*





The purpose of the *Beyond Sunday* Education Fund scholarship program, and other education initiatives established by the Foundation, is to contribute to meeting the needs of families seeking a Catholic education for their children.

ng hope into reality





Many Catholics have a faithful connection to their alma mater, parish, or another Catholic ministry. Their vision may be fulfilled by establishing a fund for their unique intention. It is through these opportunities that we are able to build hope.



# Creating Legacies



# Planned Giving

The vision of the Roman Catholic Foundation is to connect donors with their charitable interests.

The Foundation offers tax-deductible, long-term funding solutions that allow donors to select their area of interest and direct how their gift will be used. Donors may establish a new fund or contribute to any existing fund, at any time, in any amount.

The majority of planned gifts are created through a will or trust. However, there are many ways to ensure that your vision for the long-term financial stability of your favorite Catholic organizations can be realized. If you are interested in establishing a planned gift, please contact the Roman Catholic Foundation.

## F O U N D A T I O N F U N D S

### Edward J. Auer Education Endowment Fund

Ed Auer was a teacher in the Catholic schools located in the Archdiocese of St. Louis for most of his adult life. Through his strong Catholic lifestyle and example, he made such an impact on his students that they created this fund, which provides scholarships to students in the Catholic schools in South City.

### *Beyond Sunday* Education Endowment Fund

The *Beyond Sunday* Education Fund is designed to transform Catholic education in the Archdiocese of St. Louis. In addition to providing scholarships to middle-income families, the fund will provide resources to ensure the competitiveness of our Catholic education system by strengthening academic capacity and seeding innovation at the organizational level.

While the intent of the fund is to strengthen Catholic education for generations to come, the Roman Catholic Foundation Board of Trustees has approved enhanced distributions from the fund for 2016-2020. By setting aside early contributions to the *Beyond Sunday* campaign, the Foundation can immediately begin investing in the future of our Catholic schools.

### Friends of the Cathedral Basilica Endowment Fund

The Cathedral Basilica of Saint Louis is a masterpiece of art and history, rivalling the grandest cathedrals in the world. Artisans, craftsmen, stonecutters, and masons spent almost a century creating this incomparable church. This fund was created to support the general needs of maintenance and renovation as determined by the Board of the Friends of the Cathedral Basilica.

### Kathleen Ann Gau Memorial Scholarship Endowment Fund

This fund was created to honor Kathleen's memory, and to provide scholarships to students at Bishop DuBourg High School.

### Joan and Mark Guyol Family Donor-Advised Fund

This Donor-Advised Fund was created to provide the donors with a charitable vehicle allowing them to recommend that gifts be made to their favorite Catholic charitable organizations.

### Kenrick-Glennon Seminary Endowment Fund

This fund is intended to provide operating support for the St. Louis Roman Catholic Theological Seminary, commonly known as Kenrick-Glennon Seminary.

#### Christopher J. Grimaud Scholarship Endowment Fund

The family of Christopher Grimaud established this fund to provide scholarships to qualified students at Chris's alma mater, St. Mary's High School, to honor his memory and to ensure young men can enjoy the same educational experience as Chris.

#### Christine Kazanas Memorial Scholarship Endowment Fund

This fund was created by the family of Christine Henderson Kazanas, a vibrant young woman who lost her battle with cancer at a very young age. The fund will provide scholarships to students attending John F. Kennedy Catholic High School, Christine's alma mater.

#### Donna L. Koelling–Marygrove Education Endowment Fund

Donna Koelling understood the importance of the services provided to the students at Marygrove. This fund was created in her honor to provide operating support for Marygrove, a youth residential treatment program located in North St. Louis County.

#### Perpetual Light Society Endowment Fund

The Annual Catholic Appeal provides grants to parishes, schools, and other charitable organizations throughout the Archdiocese of St. Louis. This fund helps people in need through the Perpetual Light Society, which recognizes those who support the Annual Catholic Appeal through the creation of planned gifts.

#### Monsignor James E. Pieper Scholarship Endowment Fund

This scholarship fund was created to honor Monsignor James E. Pieper, pastor of St. Clement of Rome Parish from 1990 until his retirement in 2014. The fund will provide partial high school scholarships to one or more 8<sup>th</sup> grade students graduating from St. Clement of Rome School and attending a Catholic high school.

#### Virginia Celeste Piontek Scholarship Endowment Fund

Virginia cherished her Catholic faith, and shared her love by serving for many years as a PSR teacher. This fund provides scholarships to individuals attending courses at the Pontifical Paul VI Institute for Catechetical and Pastoral Studies (Paul VI Institute).

#### Roman Catholic Foundation Fund

The purpose of this unendowed fund is to provide resources for the ongoing operational needs of the Foundation, including, but not limited to, salaries, rent, and other expenses necessary to further our mission.

#### St. Vincent de Paul Knights of Columbus Endowment Fund

The St. Vincent de Paul Knights of Columbus Conference at St. Matthias the Apostle Catholic Church created this fund to provide general support for the works of this Knights of Columbus Conference.

#### Timothy and Susan Sansone Family Donor-Advised Fund

This Donor-Advised Fund was created to provide the donors with a charitable vehicle allowing them to recommend that gifts be made to their favorite Catholic charitable organizations.

#### David and Diane Snively Family Donor-Advised Fund

This Donor-Advised Fund was created to provide the donors with a charitable vehicle allowing them to recommend that gifts be made to their favorite Catholic charitable organizations.

#### St. Louis Opportunity and Achievement Realized! (SOAR!) Scholarship Fund

This unendowed fund provides scholarships to underserved students who attend or wish to attend select Catholic elementary and secondary schools within the City of St. Louis and North St. Louis County.



# Robert Gau

D O N O R P R O F I L E



“Without faith, you have nothing,” says Robert (Bob) Gau. These words speak to Bob Gau’s approach to life. Bob’s journey

has included his loving wife Kathy of 47 years, 10 children, 26 grandchildren, four great-grandchildren, a successful business, and, very importantly, an opportunity to make a lasting impact in the Catholic Church. “Faith will get you through crises in life,” he says. This faith includes a belief in the importance of Catholic education.

Bob believes in endowments for Catholic education. His most recent fund memorializes Kathy, who passed away in 2008. The Kathleen Ann Gau Memorial Scholarship Endowment Fund will provide scholarships for students to attend Bishop DuBourg High School for generations to come.

“I feel it is hard for people to afford to send their children to Catholic schools,” Bob says. When he attended grade school, his parents donated regularly to offertory collections, but in no way

would their contributions have covered the cost of his education. Later, eight of his ten children attended Catholic elementary schools tuition-free. “People who have received a Catholic education free or at a very low cost have an obligation to give back,” Bob says.

His last two children did require tuition to attend Catholic elementary school. When they finished, he began to donate what had been their tuition fees, in addition to his regular Church contribution. He understood that the Catholic Church, as well as the school, had earned his ongoing support. Bob, like so many Catholics, understands that Catholic education is the future of our faith.

With the declining Catholic school enrollment, he believes we all need to do our part to stem that tide. “In an ideal world, Catholic education would be free. I think it is the best form of evangelization. We should all be looking at the deficit our parishes face to offer Catholic education to all families who would like to attend, and, as a parish family, raise funds to close that deficit,” says Bob.



# Beyond Sunday Campaign Update

## The Origin of *Beyond Sunday*

In 2011, Archbishop Robert J. Carlson introduced *Alive in Christ!*, a strategic plan to engage the hearts and minds of young Catholics. *Beyond Sunday*, the Roman Catholic Foundation's first major initiative, fulfills a key promise of *Alive in Christ!* — enhancing financial resources for Catholic schools, parishes, and families to sustain our local Catholic Church for generations.

## Why *Beyond Sunday*?

Graduates of Catholic schools are significantly more likely to remain active in the Catholic Church. They're also more likely to make positive contributions to their local community in other ways: by voting, by being supportive of diverse opinions, and by completing higher levels of education. The *Beyond Sunday* campaign will help secure a bright future for individual graduates and the St. Louis community as a whole.

## What Is *Beyond Sunday*?

*Beyond Sunday* is a capital campaign designed to bolster life-long Catholic faith in the St. Louis Archdiocese through inspired education that lights up young minds both academically and spiritually. A way to engage students in the classroom and in parish communities at a formative time, *Beyond Sunday* will transform Catholic education in three important ways:

- Financial help for middle-income families to attract and keep children enrolled in our Catholic schools.
- Funding to develop more competitive programs in the areas of science, technology, religion, engineering, arts, and mathematics (STREAM).

- Grants for system-wide implementation of groundbreaking ideas that will change the operational and business models of our Catholic schools to assure their growth and success.

Our schools are where students are taught to deepen and express their spirituality. Without adequate support, this profound experience will erode, along with Mass attendance and the number of practicing Catholics who are living their faith “Beyond Sunday.”

## The *Beyond Sunday* Campaign by the Numbers:

- Duration of the campaign: July 1, 2015, through December 31, 2016
- Number of parishes that participated in the campaign in 2015: 45
- Number of parishes that will participate in the campaign in 2016: 146
- Total amount raised in 2015: \$38,189,994.16

## SOAR! Scholarship Fund

Addressing the educational achievement gap in the City of St. Louis and in North St. Louis County is an essential first step in addressing the high levels of poverty and unemployment that plague these areas. Additionally, enhancing primary and secondary educational outcomes is a critical component of economic and workforce development for the greater St. Louis region.

The SOAR! (St. Louis Opportunity and Achievement Realized!) Scholarship Fund relies on corporate and community giving to provide tuition assistance to underserved students who attend or wish to attend select Catholic elementary and secondary schools within the City of St. Louis and North St. Louis County.



For the 2015-2016 school year, 32 students were able to attend Trinity Catholic High School, thanks to a lead gift from Mr. Jack C. Taylor and his family, while an additional 82 students were able to attend various Catholic grade schools through a substantial gift from Dennis and Judy Jones. For the 2016-2017 school year, we estimate that over 189 students will benefit from SOAR! scholarships, thanks to the generosity of Jack C. Taylor, Dennis and Judy Jones, Edward Jones LP, and RubinBrown LLP.

### Hope Beyond Measure

While the figures here are significant, they only begin to show how many lives *Beyond Sunday* can touch. The positive ripple effect will reach countless others, far into the future.

#### *Education*

- 55,728 students
- 140 Catholic schools (113 elementary schools, 27 high schools)
- 10 special education schools and learning centers

#### *Faith*

- 515,251 Catholics
- 340 archdiocesan priests
- 273 religious order priests
- 136 religious order brothers
- 1,301 religious order sisters
- 262 deacons
- 54 archdiocesan seminarians

#### *Community*

- 191 parishes, chapels, shrines and oratories
- 11 counties



# Alive in Christ!





In Catholic education, there is a growing movement to integrate science, technology, engineering and mathematics (STEM) with the arts (A) and Religion (R). With STREAM, a balance of disciplines engages students in the learning process, encouraging both analytical and creative thinking.



# Growing Strong





## Statement of Financial Position

As of December 31, 2015 and 2014

	2015	2014
<b>Assets</b>		
Cash	\$ 2,746,380	\$ 384,906
Investments – at fair value	\$ 8,817,792	\$2,913,866
Pledges Receivable – net	\$22,141,810	\$4,325,672
Other Assets	\$ 148,749	\$ 32,280
<b>Total Assets</b>	<b>\$33,854,731</b>	<b>\$7,656,724</b>
<b>Liabilities</b>		
Accounts Payable and Accrued Liabilities	\$ 87,643	\$ 31,987
Funds Held for Others	\$11,871,857	\$ 255,000
Grants Payable	\$ 201,400	\$ –
<b>Total Liabilities</b>	<b>\$12,160,900</b>	<b>\$ 286,987</b>
<b>Net Assets</b>		
Unrestricted	\$ (872,232) *	\$ 533,076
Temporarily Restricted	\$14,531,449	\$ 582,686
Permanently Restricted	\$ 8,034,614	\$6,253,975
<b>Total Net Assets</b>	<b>\$21,693,831</b>	<b>\$7,369,737</b>
<b>Total Liabilities and Net Assets</b>	<b>\$33,854,731</b>	<b>\$7,656,724</b>

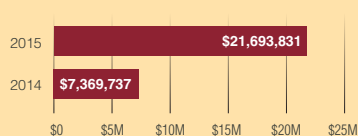
\* Beyond Sunday campaign expenses incurred to date exceed revenues restricted to pay campaign expenses to date.

## Statement of Activities

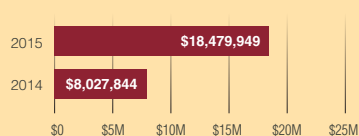
As of December 31, 2015 and 2014

	2015	2014
<b>Revenue</b>		
Total Contributions, including amounts raised for others	\$29,410,845	\$8,123,252
Less: Amounts raised for others	\$10,889,110	\$ 255,000
<b>Net Contributions</b>	<b>\$18,521,735</b>	<b>\$7,868,252</b>
Grants	–	\$ 90,000
Investment Management Fees	\$ 5,089	\$ –
Miscellaneous Income	\$ 5,606	\$ 25,409
Interest and Dividends	\$ 42,232	\$ 794
Investment Gains (Losses)	\$ (94,713)	\$ 43,389
<b>Total Revenues</b>	<b>\$18,479,949</b>	<b>\$8,027,844</b>
<b>Program Grants</b>		
<b>Total Grants</b>	<b>\$ 478,193</b>	<b>\$ 35,846</b>
<b>Operating Expenses</b>		
Programs	\$ 59,059	\$ –
General and Administrative	\$ 428,858	\$ 375,305
Fundraising	\$ 3,189,745	\$ 590,211
<b>Total Expenses</b>	<b>\$ 3,677,662</b>	<b>\$ 965,516</b>
Change in Net Assets	\$14,324,094	\$7,026,482
Beginning Net Assets	\$ 7,369,737	\$ 343,255
<b>Ending Net Assets</b>	<b>\$21,693,831</b>	<b>\$7,369,737</b>

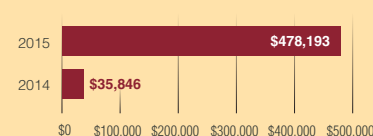
**Total Net Assets**



**Total Revenues**



**Total Grants**



# A Message from Archbishop Carlson


Dear Brothers and Sisters,

In Mark 4:30-32, Jesus compares the kingdom of God to a mustard seed which, when sown, “grows up and becomes larger than all the garden plants and forms large branches, so that the birds of the air can nest under its shade.” As Catholics, each of us is called to use our unique gifts to sow the seeds of God’s kingdom. Our gifts may start small, but when tended properly they can grow into a source of life and nourishment for others.

The Roman Catholic Foundation of Eastern Missouri was formed in 2013 to serve as the charitable giving resource for our local Catholic community. Through the *Beyond Sunday* campaign, the Foundation is also fulfilling a key priority of my *Alive in Christ!* Mission Advancement Initiative: the transformation of Catholic education in the Archdiocese of St. Louis. I could not be more pleased with the Foundation’s progress to date.

Thank you to the Board of Trustees and donors who have contributed to the early success of the Foundation’s mission, as well as to the leaders of our parishes, schools, and ministries who have embraced the Foundation as their planned giving partner. Please pray for the continued success of the Roman Catholic Foundation as it works to grow and sustain the kingdom of God for future generations.

Sincerely yours in Christ,

A handwritten signature in black ink, reading "+ Robert J. Carlson". The signature is written in a cursive, flowing style.

Most Reverend Robert J. Carlson  
Archbishop of St. Louis





**Roman Catholic Foundation  
of Eastern Missouri Board of Trustees**

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Michele and Rick Forshaw  
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