


SERVANT LEADERSHIP

2 0 1 0 A N N U A L R E P O R T





... WHOEVER
WISHES TO BE
FIRST AMONG
YOU WILL BE THE
SERVANT OF ALL.
FOR THE SON
OF MAN DID
NOT COME TO BE
SERVED BUT TO
SERVE ...

MARK 10: 43-45



SERVANT LEADERSHIP

Dear Member of FADICA:

The theme for the 2010 annual report is “servant leadership.” That rich concept best captures the amazing array of committed, generous and dynamic individuals with whom it was our privilege to collaborate in the past year.

It is also a theme that speaks of the values and goals we all hold in common as a philanthropic organization. These include: listening, empathy, healing, stewardship, commitment to human flourishing and building community.

What better examples of servant leadership could we find than in the work and experiences of women religious whose lives of service we celebrated throughout 2010?

Our report touches on the inspiring series of conversations we had with some of these remarkable women, while also putting the spotlight on other servant leaders in our ranks and their contributions to what was an eventful and highly fruitful year for FADICA.

We are confident that you will find inspiration in these pages, and we thank you for your generous participation in FADICA’s work this year.

Sincerely,

Francis J. Butler
President



LEADERSHIP AND INGENUITY

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CATHOLIC SISTERS: A LEGACY OF SERVANT LEADERS

In the beginning of 2010, the Smithsonian Institution in Washington, DC hosted the opening of a spectacular new exhibit called *Women & Spirit*. Overflow crowds were drawn to take in this unique tribute to the history of Catholic sisters in the U.S. and their awe-inspiring achievements.

The expansive and dramatic display of photos and artifacts told the compelling story of Catholic sisters over a span of three centuries, during which they made crucial contributions not only to the Catholic church in the U.S. but to the country as a whole. Foremost among these are:

- ❖ Establishing the largest private school system in the world
- ❖ Laying the foundation for an extensive network of hospitals and special-care facilities that today treats 6 million patients in a single year
- ❖ Founding 110 colleges and universities
- ❖ Serving the poorest and most vulnerable members of American society.

Fittingly, in 2010 the Catholic foundation and donor community of FADICA also paid tribute to the leadership, ingenuity and limitless philanthropy of women religious. This came in the form of three conferences—one highlighting the broad range of their ministries in the U.S. today, a second examining their work around the world, and a third reflecting on their missions in rural and underserved areas of the country.

Sr. Marlene Weisenbeck, FSPA, president of the Leadership Conference of Women Religious, opened the discussion at the first of FADICA's three sessions devoted to the sisters. She said that, despite a decline in numbers, religious life is very much alive today and continually reshaped by and adapting to what she described as "the need to create structures of compassion in a world of increasing depersonalization."

At the January meeting, more than twenty sisters enthralled FADICA members with presentations on their ministries and philanthropy. Across the board they affirmed that their impact—past and present—is indissolubly linked to the Catholic values and principles that permeate their work: compassion, concern for human dignity and social justice, and their self-identification as agents of God's love and mercy.

- ❖ Sr. Jean Keniry, OSF, gave foundations and donors a glimpse of her experiences overseeing the mission of the famed Mayo Clinic in Rochester, MN.
- ❖ Immaculate Heart Sisters Constance Touey and Jeannette Lucey gave a moving account of the day-to-day running—and keeping financially afloat—of St. Francis De Sales, a 500-student inner-city Catholic school in Philadelphia.



JOYFUL PHILANTHROPY

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❖ Sister of Charity Barbara Busch, a noted advocate for affordable housing, talked with pride of her work in Cincinnati with poor families who, thanks to a partnership with her community, were able to build and buy their own homes, bringing much-needed stability to their neighborhood.

In June, in Los Angeles, the international missions of American sisters were showcased at a FADICA conference entitled *Global Partnerships for Human Progress*, which was co-sponsored by the Conrad N. Hilton Foundation. Sisters can be found almost everywhere today—from the halls of the United Nations, where they are working for peace, to the Democratic Republic of Congo, where they are teaching environmentally sound farming methods to poor women.

Over and over again, sisters impressed upon conference participants that the effectiveness women religious so often enjoy in their ministries derives from their closeness to those to whom they minister. “The strength of our ministry,” said Sr. Carol Zinn, SSJ, one of FADICA’s guest speakers, “is distinguished by an intimacy with the community in which we serve.”

Sisters enjoy the trust of the community they serve through their talent for relationship-building. This fundamental fact was driven home during emotional testimony in October, when members of FADICA heard from several women who had been helped by sisters during times of grave difficulties for themselves and their families. Some of these were Native American women whose lives had been transformed by the intervention and witness of sisters living among them.

They spoke at a FADICA conference, co-sponsored by the Catholic Extension Society, which generously supports the work of the sisters in the home missions. As one young single mother put it, “I don’t believe I would be alive today if it were not for these good women.”

The sisters stressed the urgency of the development of new forms and expressions of lay leadership that could guide the church of the future—especially in remote areas of the country and in the service of underserved and underprivileged populations. In their own missionary work, the sisters are facing the reality of diminishing ranks and the risk of leaving those most in need without a church leader—unless the laity rises to the challenge.

THROUGHOUT ITS DISTINGUISHED HISTORY, FADICA
HAS LIFTED UP THE MINISTRY OF WOMEN RELIGIOUS ...
AND MANIFESTED A REMARKABLE SPIRIT OF SOLIDARITY
AND SUPPORT FOR WHICH WE ARE TRULY GRATEFUL.

SR. JOYCE MEYER, PBVM
EXECUTIVE DIRECTOR
CONRAD N. HILTON FUND FOR SISTERS



THE POWER OF PARTNERSHIPS

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CATHOLIC SCHOOLS AND PHILANTHROPY: SERVANT LEADERS IN ACTION

The extensive network of Catholic schools throughout the U.S.—some 6,000 in all—is a tribute both to the faithful who built and financially supported them and to the religious women and men who once staffed almost all of them.

Today, this legacy is in the hands of devoted lay teachers and principals. They face the daunting challenge of accommodating ever larger numbers of poor children in the inner-city whose families cannot afford private school tuition. In recent years, hundreds of schools have succumbed to mounting financial costs linked to diminishing enrollment caused, in part by increased competition from charter schools and improving public schools.

Since the 1960s, the number of Catholic schools has almost been cut in half. That, however, is not the whole story.

In major cities like Chicago, New York, Los Angeles, Boston, and Baltimore—as well as in the medium-sized metropolitan areas of Bridgeport, CT, Indianapolis, and Dayton, OH—Catholic school leaders are experimenting with bold, innovative approaches. These new strategies are demonstrating the power of partnerships as the key to the long-term sustainability of Catholic schools.

❖ In Chicago, the Big Shoulders Fund—an organization dedicated to the support of inner-city schools in the city—has entered into a partnership with the Joffrey Ballet to provide arts education. Big Shoulders has also collaborated with the Chicago Community Trust to work for improvements in the teaching of math and science. What's more, Peoples Energy, a local natural gas utility, and Union Pacific Railway have joined Big Shoulders in financing after-school programming at thirty-four Catholic schools.

❖ The Archdiocese of Boston is collaborating with the Lynch School of Education at Boston College to give students at fourteen of the city's Catholic elementary schools access to health and social services in the community. The project, called City Connects in Catholic Schools, addresses non-academic barriers to learning for nearly 4,000 children.

❖ In the Diocese of Bridgeport—where 40 percent of the Catholic schools have been awarded the much sought-after “U.S. Blue Ribbon” distinction for excellence—1,000 teachers, representing four clusters of ten schools, are collaborating on the development of school curricula. Their success hinges on partnerships with the diocesan schools' office, pastors, proactive lay boards, as well as local universities—all contributing to a process that ensures the schools' highest possible performance and accountability.



NEW STRATEGIES





In Los Angeles, nine Catholic inner-city schools were able to team up thanks to a partnership with the Specialty Family Foundation, which has provided for a professional team of development and marketing directors to increase revenue and enrollment for participating schools.

The debate over the future of the Catholic schools in the U.S. is more spirited than ever. FADICA will continue to do its part by highlighting the key issues, especially by showcasing, supporting and encouraging innovative partnerships and approaches that help make the operation of Catholic schools sustainable.

To make more concrete progress on this front, FADICA has begun planning for a grant-makers' conference called *Sustainable Partnerships for Catholic Schools of the Future*. The conference will demonstrate that an environment that values quality, fosters creativity, and promotes dynamic partnerships is one in which Catholic schools are guaranteed to flourish.

In addition, FADICA will encourage research and discussion on the merits of a nationwide initiative to tell the story of Catholic schools as they are poised to become laboratories of educational innovation benefitting the whole country.

I BELIEVE THAT CATHOLIC SCHOOLS CAN
MODEL WHAT IT MEANS TO BE THE BEST SCHOOLS ...
AND I BELIEVE THAT THE
CATHOLIC PHILANTHROPIC COMMUNITY,
ACTING THROUGH FADICA, HAS BEEN
AND WILL BE AN IMPORTANT INFLUENCE IN
SHAPING THE FUTURE OF CATHOLIC SCHOOLS.

DR. LORRAINE OZAR
FOUNDING DIRECTOR
LOYOLA UNIVERSITY CHICAGO
CENTER FOR CATHOLIC SCHOOL EFFECTIVENESS



A REVITALIZED FUTURE

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LEADING THE CHURCH WITH IMAGINATION: SERVANT LEADERS WITH VISION

From its founding, FADICA has been richly endowed with the membership of extraordinary philanthropists who can truly be called spiritual entrepreneurs. Like their predecessors, today's leaders in Catholic philanthropy have their feet firmly planted in the often troubling pastoral realities of the day—but their vision allows them to see beyond current obstacles. They have the foresight and good sense to prepare for an emerging future, laying the foundations for new and lasting solutions.

One of the great challenges facing the U.S. church today is the development of a pastoral strategy in response to the phenomenal growth of the Hispanic Catholic community. FADICA's engagement with the Catholic Church Extension Society, one of its newest members, sparked thought-provoking discussion on the subject.

The Hispanic population of the U.S. is fast approaching fifty million. Catholic Extension's talented president, Fr. Jack Wall, told FADICA that research makes it abundantly clear that the church's pastoral and financial means to serve, embrace and engage this community in the church's life, are vastly "incommensurate with this reality."

❖ Almost 40 percent of the entire U.S. Catholic population is Hispanic. Hispanic Catholics are projected to form the majority of Catholics in the U.S. by the middle of the century. Already, more than half of all U.S. Catholics under the age of twenty-five are of Hispanic descent.

❖ Hispanics account for 70 percent of the growth of the U.S. church in recent years, but the church is struggling mightily to welcome and empower Hispanic Catholics as full members of the Catholic community.

❖ Hispanic Catholics represent less than 4 percent of students enrolled in U.S. Catholic schools.

To help turn the tide, Catholic Extension—in collaboration with more than eighty home mission dioceses with large Hispanic populations—has embarked on an ambitious but carefully-crafted plan to create one hundred new lay positions in the church. These will be given to young, talented Hispanic church leaders whose formation will enable them to lead the church's ministry in the home missions well into the future. This \$15 million pioneering effort will aim to engage foundations and donors in a partnership that promises historic progress, amounting to a genuine revitalization of U.S. Catholicism.

In a parallel development, Catholic Extension will also work with the Mexican American Catholic College (MACC) in the Archdiocese of San Antonio to respond to the acute need in higher education across the United States to provide pastoral leaders in Hispanic Ministry.

Catholic Extension, working through MACC, will prepare students – including seminarians, women religious and laity – to exercise multi-cultural leadership roles in campus-based parishes and within home mission dioceses through a new master's program in ministry.

For decades MACC has been doing superb work in theological education and multi-cultural pastoral preparation and this new partnership with Extension and other funders bodes well for the future of the entire church in the U.S.

Whatever the challenges at hand, managing and financing the church's mission today requires not only competence but a real passion for adhering to the best operational practices.

On this score, throughout 2010 FADICA viewed with continued admiration the groundbreaking work of the National Leadership Roundtable on Church Management—and in particular, the leadership of Bishop Dale J. Melczek of the Diocese of Gary, IN. Bishop Dale was, three years ago, the first ordinary to implement the Roundtable's *Standards for Excellence: An Ethics and Accountability Code for the Catholic Sector*.

Bishop Melczek is a fine example of a church leader with vision. His encouragement and support of the Roundtable in its development of the *Standards for Excellence* for both dioceses and parishes has been invaluable.

The *Standards for Excellence* program is unique in providing Catholic dioceses, parishes and nonprofits with a common sense approach to achieving the highest standards in governance and management—while staying focused on their pastoral mission in service of its people and communities.

In 2010 the Carnegie Corporation of New York, in tandem with the University of Notre Dame, conducted in-depth research in the Diocese of Gary and recorded dramatic improvements in all aspects of parish ministry, from governance to fundraising. As the final research report noted, "the *Standards for Excellence* initiative provides a common ground of sorts—both needed and welcomed—for ethical and responsible parish practices within the diocese."



The documented success of the *Standards for Excellence* bodes well for their adoption by a growing number of dioceses across the country.

Another inspiring example of challenges met and overcome is the work of Sister of St. Joseph Donna Gunn. She is based in the Diocese of Jackson where she has served on the leadership team of a small rural parish in Camden, MS. Today, she is helping the entire diocese prepare for its future. Members of FADICA had the privilege of meeting Sr. Donna in 2010, along with a number of other extraordinary sisters, as part of our year-long series of discussions on women religious.

In the Jackson Diocese—where only about 2 percent of the general population is Catholic, and where just thirty-five priests must minister to a hundred parishes and mission churches—a well-formed lay church leadership is an urgent necessity.

In order to stay vibrant, faith communities scattered across a territory of 38,000 square miles must somehow be held together and led, even when Mass cannot be celebrated every Sunday.

This is where Sr. Donna’s work is crucial: she is recruiting and preparing new lay leaders to keep the faith alive in the parish communities. Candidates are required to have advanced degrees in theology and undergo rigorous pastoral skills training. Cooperative arrangements with Catholic universities in the region are facilitating this vital process.

Sr. Donna told FADICA that foundations and donors need to appreciate more fully that “the movement of the Spirit is pushing us forward ... [and] calling the laity to a capacity of leadership.” The wisdom of this gifted sister will continue to influence and guide FADICA’s conversations about how philanthropic resources can best help with the tasks at hand.

FOR OVER THREE DECADES THE MEMBERS OF FADICA HAVE BEEN BUILDING UP A CULTURE OF CATHOLIC PHILANTHROPY DISTINCTIVE IN ITS EXPRESSED CONCERN FOR FUTURE GENERATIONS OF CATHOLICS.

FR. JACK WALL
PRESIDENT
CATHOLIC CHURCH EXTENSION SOCIETY



COLLABORATION TO REBUILD

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A GLOBAL CHURCH: THE COMPASSION OF SERVANT LEADERS

The year 2010 began shockingly with a catastrophic earthquake virtually leveling Port-au-Prince, the capital of the impoverished nation of Haiti. More than 200,000 people died and 300,000 were injured. Some 250,000 homes and 30,000 commercial buildings were severely damaged. A million people were left homeless. The earthquake also destroyed churches and schools, killing many church ministers, including priests and sisters as well as the Archbishop of Port-au-Prince, Joseph Serge Miot.

U.S. Catholic non-governmental organizations, such as the Catholic Medical Mission Board and Catholic Relief Services, mobilized instantly to deliver life-saving provisions in the form of food, water, medical supplies, and shelter materials. Members of FADICA offered generous help in the form of donations, with some making personal visits to the suffering island nation.

The American bishops raised more than \$80 million through parish collections, and collaborated with their counterparts around the world—including the bishops of Haiti—to establish PROCHE (“Close By”), an agency that will plan and coordinate the rebuilding of Haiti’s churches and other Catholic institutions.

Sr. Ellen Flynn, RSM, who has spent twenty years in Haiti, urged the members of FADICA—gathered for the Global Partnerships for Human Progress symposium—to bear in mind that Haiti’s lack of infrastructure means that the aid effort must rely on small, nimble organizations to deliver and administer aid where it is needed most. “Think about having a small group of sisters on site. Your money will always be well spent and fully accounted for,” she said.

Given the country’s enormous needs, the rebuilding of Haiti—which even before the earthquake was in very poor shape—will undoubtedly take a very long time. However, the Catholic church can play a pivotal role in the rebuilding effort and in giving the people in this highly devout nation moral and spiritual support. Accordingly, the foundation and donor community of FADICA anticipates that Haiti will continue to command attention for at least several years to come.

MORE THAN 230,000 PEOPLE DIED, AND MANY, MANY MORE PEOPLE WERE INJURED. SISTERS DIED AND MANY OTHER SISTERS WERE SERIOUSLY INJURED. WE HAD SISTERS WHO SURVIVED BUT WHO WERE JUST AS TRAUMATIZED AS THE REST OF THE PEOPLE. THERE WAS NEVER AN EARTHQUAKE OF THIS MAGNITUDE IN HAITI. NEVER... AND YET, AS THE DAYS UNFOLDED, THE SPIRITUAL FOUNDATION OF THE PEOPLE BECAME EVIDENT. THEY DIDN’T BLAME GOD, THEY JUST PRAISED GOD THAT THEY HAD SURVIVED AND ASKED GOD TO HELP THEM.

SR. ELLEN FLYNN, RSM
U.S. MISSIONARY TO HAITI

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A SPIRIT OF ENTERPRISE AND SELFLESS SERVICE



FADICA GROWTH AND TRANSITION: PREPARING FOR THE FUTURE

The past year was a time of new growth for FADICA, as it gratefully welcomed five new members:

❖ The Y and H Soda Foundation of Oakland, CA was the creation of the late Mr. and Mrs. Y. Charles Soda, who were committed to helping low-income families improve their lives. Mr. Soda was one of the original owners of the Oakland Raiders football team and a co-founder of the Port of Oakland.

❖ The Catholic Medical Mission Board was founded in 1928, its mission rooted in the healing ministry of Jesus. In partnerships with both for-profit and nonprofit organizations, it provides quality healthcare programs and services to the most needy communities in developing nations. Last year, it sent donated medicines valued at more than \$64 million to Haiti.

❖ The Sisters of Charity of Cleveland Foundation, and the Sisters of Charity of South Carolina Foundation, both joined FADICA in 2010. The foundations are focused on supporting the most vulnerable people, especially targeting families, women and children living in poverty.

❖ Our Sunday Visitor (OSV) Institute is a charitable agency associated with one of the biggest and most diversified Catholic publishing houses in the country, which, among many other titles, publishes *Our Sunday Visitor*, the weekly newspaper. The OSV Institute has a long history of funding programs that focus on catechesis, educating Catholics about discerning and being faithful to personal vocations, and supporting initiatives that integrate the principles of stewardship into the daily lives of all Catholics.

These new additions to FADICA represent a combined total of some \$270 million in annual giving. Their experience in the world of Catholic giving and their unique perspective on key areas of Catholic philanthropy will greatly enrich FADICA's discussions and enhance the organization's ability to be of service to the church.

FADICA looks forward to 2011 when it will again devote much attention to new financial and governance formulas that can ensure the long-term sustainability of Catholic schools. We will also be exploring further ways to meet the enormous need for more lay leadership formation throughout the U.S., especially in light of the fast-growing Hispanic population.

The Catholic environment continues to undergo rapid change, marked both by surprising new growth and the struggle of institutions facing pressures almost to the breaking point. To help church-related institutions and programs deliver the Christian message of divine love and compassion to today's hurried and broken world, philanthropists must exhibit a spirit of enterprise and selfless service. More and more, as this past year has amply demonstrated, this is an indispensable touchstone for servant leaders.

Informed and rich discussion at FADICA conferences and the solidarity among its members will continue to guide their steps and sustain them during this most adventurous journey.

FINANCIALS

STATEMENTS OF FINANCIAL POSITION

DECEMBER 31, 2010

CURRENT ASSETS

Cash and cash equivalents	\$ 689,366
Investments	364,474
Accounts receivable	42,759
Promises to give	42,500
Inventory	29,799
Interest receivable	5,184
Prepaid expenses	<u>1,786</u>

Total current assets	<u>1,175,868</u>
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PROPERTY AND EQUIPMENT

Furniture, fixtures and equipment	107,225
Accumulated depreciation	<u>[91,129]</u>

Total property and equipment	<u>16,096</u>
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OTHER ASSETS

Cash and cash equivalents (including restricted cash and cash equivalents of \$112,968)	672,346
Investments	4,022,147
Rent deposits and other assets	<u>1,907</u>
Total other assets	<u>4,696,400</u>

TOTAL ASSETS	<u>\$ 5,888,364</u>
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CURRENT LIABILITIES

Accounts payable	\$ 2,400
Accrued expenses	9,621
Deferred revenue	<u>34,090</u>
Total current liabilities	<u>46,111</u>

TOTAL LIABILITIES	<u>46,111</u>
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NET ASSETS

Unrestricted	526,230
Unrestricted - board designated	2,826,457
Temporarily restricted	1,123,738
Permanently restricted	<u>1,365,828</u>
Total net assets	<u>5,842,253</u>

TOTAL LIABILITIES AND NET ASSETS	<u>\$ 5,888,364</u>
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STATEMENTS OF CASH FLOWS

DECEMBER 31, 2010

CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	\$ 669,893
Adjustments to reconcile change in net assets to net cash used by operating activities	
Depreciation	9,398
Contributions received, restricted for long-term investment	(455,969)
Unrealized (gain) loss on investments	(467,779)
Realized (gain) loss on sale of investments	113,095
(Increase) decrease in operating assets	
Accounts receivable	1,500
Promises to give	85,587
Inventory	5,759
Interest receivable	(5,184)
Prepaid expenses	(350)
Increase (decrease) in operating liabilities	
Accounts payable	(1,217)
Accrued expenses	(3,041)
Deferred revenue	22,390
Pass-through grant payable	(15,000)
Net cash used in operating activities	<u>(40,918)</u>

CASH FLOWS FROM INVESTING ACTIVITIES

Property and equipment purchases	(686)
Proceeds from sale of investments	693,883
Purchases of investments	<u>(793,670)</u>
Net cash used in investing activities	<u>(100,473)</u>

CASH FLOWS FROM FINANCING ACTIVITIES

Contributions received, restricted for long-term investment	455,969
Net cash provided by financing activities	<u>455,969</u>
NET INCREASE IN CASH AND CASH EQUIVALENTS	314,578
CASH AND CASH EQUIVALENTS - BEGINNING OF YEAR	<u>1,047,134</u>
CASH AND CASH EQUIVALENTS - END OF YEAR	\$ <u>1,361,712</u>

Significant non-cash investing and financing activities: During 2010, the Organization disposed of assets with an aggregate basis and accumulated depreciation of \$8,396 and \$8,396, respectively.

ASSISI FOUNDATION OF MEMPHIS
Memphis, TN

BARRETT BATEMAN FOUNDATION
Nashville, TN

BIG SHOULDERS FUND
Chicago, IL

BOISI FAMILY FOUNDATION
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ROBERT BRUNNER FOUNDATION
New York, NY

CASSIN EDUCATIONAL INITIATIVE FOUNDATION
Menlo Park, CA

CATHOLIC CHURCH EXTENSION SOCIETY
Chicago, IL

CATHOLIC MEDICAL MISSION BOARD
New York, NY

CONNELLY FOUNDATION
West Conshohocken, PA

CUSHMAN FOUNDATION
New York, NY

CARRIE ESTELLE DOHENY FOUNDATION
Los Angeles, CA

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Pittsburgh, PA

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Pittsburgh, PA

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Fairfield, CT

LOYOLA FOUNDATION
Fairfax, VA

MGR FOUNDATION
New York, NY

MATHILE FAMILY FOUNDATION
Dayton, OH

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New York, NY

MOREY CHARITABLE TRUST
Tiburon, CA

W. O'NEIL FOUNDATION
Chevy Chase, MD

I. A. O'SHAUGHNESSY FOUNDATION
Bloomington, MN

OUR SUNDAY VISITOR INSTITUTE
Huntington, IN

PORTICUS NORTH AMERICA FOUNDATION
New York, NY

RASKOB FOUNDATION FOR CATHOLIC ACTIVITIES
Wilmington, DE

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THE ONLY
TRULY VIABLE
INSTITUTIONS
WILL BE THOSE
THAT ARE
PREDOMINANTLY
SERVANT-LED.

ROBERT K. GREENLEAF
FOUNDER
GREENLEAF INSTITUTE
FOR SERVANT LEADERSHIP

