

2018 & 2019



**The Catholic Foundation**  
of Central Florida

Inspire Giving. Fund God's Work.



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# My Sisters and Brothers in Christ:

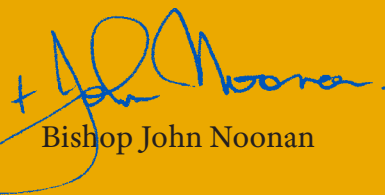
Leadership is a word we often hear bandied about and there are opinions about the type of leadership that is best for this or that. Jesus shows us a different type of leadership. It is our desire to walk within that leadership—to walk in its light. Jesus invites us to do that . . . to follow Him in a most profound manner . . . to give up power and privilege so that we offer God’s love to others. He invites us to a leadership that is not for our own doing, but of God’s.

Within this Impact Report of The Catholic Foundation of Central Florida, you will encounter invitation from an extraordinary leadership who teaches discipleship and walks us in the light of the Lord. The first encounter is with Kimberlee Riley, our newly appointed President, who led the formulation and completion of a strategic planning process resetting the framework of The Catholic Foundation of Central Florida. I am grateful to the Board of Directors and staff for their participation in this undertaking. Their fortitude to consider bold opportunities, not the “usual way of doing things” brings forward God’s light in every corner of the Diocese of Orlando.

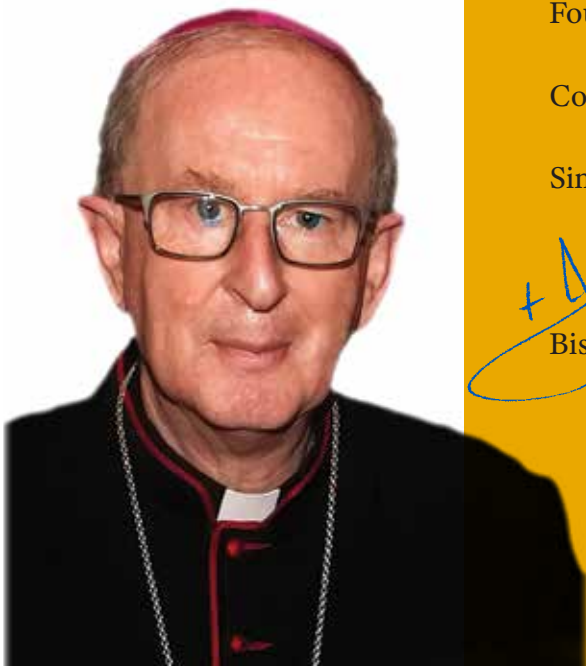
The strategic planning process led to an articulation of a vision to fund God’s work in order to impact lives and promote the Gospel, which builds the Kingdom of God. With a vision on building the Kingdom of God, The Catholic Foundation of Central Florida has already surpassed the “usual” business proforma. This vision requires excellence born out of growth, transparency, and accountability. All our parishes, schools and diocesan entities are blessed through the stewarding of gifts from The Catholic Foundation of Central Florida.

Come, turn the page. Let us walk in the light of the Lord.

Sincerely yours in Christ,



Bishop John Noonan





# Chairman's Letter

As chairman of The Catholic Foundation of Central Florida, I am honored and privileged to share with you our impact report for 2018 and 2019. Our two-year impact report illustrates how our partnership with generous donors like you has improved the quality of life for children, adults and families throughout Central Florida. We are serving more people than ever, strengthening faith life for our community in the Diocese of Orlando.

During this time, we designed and launched a new strategic plan in partnership with Bishop John Noonan, board members, pastors, staff and generous donors like you. It is a three-year strategic plan with a 10-year vision to guide our efforts in a manner that honors the principles and vision of our founding board members. Through this partnership, the Foundation created new vision, mission and values statements to guide us through the next decade. Exciting!

As we continued our excellent work, we were blessed to hire a new President & CEO, Kimberlee Riley, who came to us with 25 years of leadership experience in the private, public, and nonprofit sectors where she has led organizational and community growth. We launched a newly designed website that works well on mobile phones and makes it easier for donors to give to causes close to their hearts. We also modernized our communications by relaunching our monthly newsletters and social media outreach.

The results of our partnership with generous donors like you have been wonderful. In 2018 and 2019, we collected an average of \$16.5 million per year, surpassing our \$15 million annual goal for Our Catholic Appeal. The appeal provides critical support for our seminarians and retired priests, tuition assistance, healthcare and housing assistance to people in need, faith-formation programs, assistance for migrant workers and the disabled, and outreach programs such as Catholic Charities of Central Florida.

In the same period, we received \$2.43 million in planned gifts benefiting our parishes, Catholic Schools, and Diocesan ministries. Our campaign services redeemed \$2.8 million for our parishes. We helped participating parishes increase annual giving by an average 13.5% with our Offertory Enhancement Initiative.

On behalf of The Catholic Foundation, our board and staff, I want to say thank you again for helping us to transform lives in Central Florida. We look forward to continue serving you.

God bless you.



Orlando L. Evora  
Chairman, Board of Directors  
2014-2019





## Our Board and Staff

Top (left to right): John Kancilia, Ron Henkelman, Orlando Evora, Thomas Chandler, Very Rev. Stephen Parkes, Very Rev. John Giel, Very Rev. Ivan Olmo, Very Rev. Richard Trout, and Kevin Bowler. Bottom (left to right): Karen Monteleone, Sister Maria Acosta, Lori Tolland, and Kimberlee Riley. Not pictured: James Croson, Eric Holm, Allan Keen, Richard Strube, Stephen Zepf, and Victor Zollo.



Top (left to right): Marco Robles, George Garcia, Rafael Gerena, Janet Caramello, Marta Sweeney, Susan Diaz, Crystal St. Julien, and Riley Arnemann. Middle (left to right): Madelyn Weed, Kimberlee Riley, Doris Quinones, Rosie Camous, Shana Coulthurst, and Teresa Herran. Bottom (left to right): Susan Hunt, Dana Swanson, Stephanie Patel, and Carolyn Ell.



## Visible Community Leadership and Impact

Improve and increase partnership experiences with value-added support and services.

# Engaging Donor Experiences

Deepen faith and relationships by engaging with donors' Catholic values and provide educational opportunities on philanthropy.

# Distinctive Faith-Based Investing Management

Grow and preserve assets with enhanced giving programs that increase awareness of endowments and fund reserves supporting our community needs.





2019-2021

# Plan

## Organizational Excellence and Sustainability

Enhance governance and increase operational effectiveness.



## Vision

To be the foremost philanthropic organization through which our community contributes to fund God's work in order to impact lives and promote the Gospel, which builds the Kingdom of God.

## Mission

To inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.

## Values

### Faith-filled Passion

We nurture our faith to inspire others to transform lives through charitable giving.

### Collaboration

Through partnerships, we leverage community resources to maximize impact.

### Stewardship

We recognize that all gifts are from God and we are called to honor donor intentions and use prudence to return gifts with increase.

### Transparency

We are open and honest in our communications to provide access to information.

### Servant Leadership

We listen and learn from our community and invest in initiatives to meet their needs.

### Impact

We engage donors in serving the needs of our community and advancing ministries of the Catholic Church.

INSPIRE  
GIVING

STEWARD  
GIFTS

DEEPEN  
FAITH

SERVE  
OTHERS

SUPPORT  
COMMUNITY

IMPACT  
LIVES



[www.cfocf.org](http://www.cfocf.org)



**The Catholic Foundation  
of Central Florida**

OFFERTORY ENHANCEMENT INITIATIVE



“It truly works when you follow the Offertory Enhancement Initiative (OEI) process. The task is easy, it takes work but it flows. Our parish not only incurred donations for the offertory but our school did too. It’s important for us to ask the faithful to share their gifts! I’d have our parish participate in the program every four years. The Catholic Foundation is great to work with!”

Fr. Matthew Mello,  
Pastor at Divine Mercy, Merritt Island

## Participating Parishes

- Divine Mercy, Meritt Island
- St. Andrew, Orlando
- Our Lady of the Springs, Ocala
- St. Charles Borromeo, Orlando
- St. John Vianney, Orlando
- St. Joseph of the Forest Mission, Silver Springs
- St. Mary of the Lakes, Eustis
- St. Matthew, Winter Haven
- St. Teresa of Avila, Titusville
- St. James Cathedral, Orlando
- St. Patrick, Mount Dora





Offertory giving is one of the ways we, as disciples of Christ, return our gifts to God. It also plays an important role in how the parish is able to serve the community and minister to God's people. The Catholic Foundation facilitates an Offertory Enhancement Initiative to assist pastors and parishes throughout the Diocese of Orlando in achieving their missions. This one-year program is an informative and prayerful journey focused on offertory giving with a spiritually-based approach.

### Offertory Impact for Parishes



**Expand parish ministries**



**Enlarge parish facilities**



**Renovate parish facilities**



**Upgrade parish technologies**

# 13.5%

2018 & 2019 average increase

# \$8.7 Million

Total increase since program inception in 2012



**The Catholic Foundation**  
of Central Florida  
CAPITAL CAMPAIGN

Capital Campaigns at the parish and diocesan level address large-scale projects that go beyond routine operating budgets. We help parishes, schools, and other Catholic entities identify critical factors for campaign success and engage the faithful in meeting essential facility and ministry needs. Feasibility studies and planning services determine capacity and define the case for support. Our expert staff support pastors and lead parishioners from launch to pledge redemption to ensure successful campaigns.





**A total of more than \$6.4 Million**  
**was pledged through parish and**  
**school campaigns between July**  
**2018 and June 2019.**

St. Vincent de Paul, Wildwood  
Bishop Moore Catholic, Orlando  
Blessed Sacrament, Clermont  
St. Joseph, Palm Bay  
Good Shepherd, Orlando  
Basilica of St. Paul, Daytona Beach

**A total of more than**  
**\$2.8 Million was**  
**redeemed through**  
**parish campaigns in**  
**fiscal 2018 & 2019.**





# Community Impact



**Leadership & Parish Life:** 2018 ~ 28% | 2019 ~ 23%

Vocations & Seminarian Education, Clergy Formation, Permanent Diaconate, Bishop's Office, Liturgy, Liturgical Music, Consecrated Life, Tribunal, Ministry to Senior Priests, Ministry to International Priests



**Education:** 2018 ~ 17% | 2019 ~ 15%

Catholic Schools, Mission Office/Sister Diocese of San Juan de la Maguana, San Pedro Spiritual Development Center



**Human Dignity & Solidarity:** 2018 ~ 11% | 2019 ~ 14%

Bishop Grady Villas, Catholic Charities of Central Florida, Farmworkers Ministry, Tourism Ministry



**Discipleship & Stewardship:** 2018 ~ 10% | 2019 ~ 13%

Parish, School and Diocesan Development and Investment Management Services



**Laity, Family & Life:** 2018 ~ 7% | 2019 ~ 10%

Children's Ministry, Family Ministry, Catholic Campus Ministry, Multicultural Ministry, Youth Ministry, Adult Ministry, Mission Integration



2018 Goal:  
**\$15 Million**

2019 Goal:  
**\$15 Million**



2018 Raised Through  
12/31/2018

**\$16.6 Million**

2019 Raised Through  
12/31/2018

**\$16.4 Million**





### **Ecclesiastical Properties:** 2018 ~ 7% | 2019 ~ 7%

Cemeteries, Design & Construction, Facilities Management, Real Estate, Security



### **State & National Outreach:** 2018 ~ 6% | 2019 ~ 5%

United States Conference of Catholic Bishops, Florida Conference of Catholic Bishops, Southeast Pastoral Institute



### **Financial Services:** 2018 ~ 6% | 2019 ~ 5%

Finance, Information Technology, Parish Shared Accounting Services, Printing & Distribution, Risk Management



### **Human Resources :** 2018 ~ 4% | 2019 ~ 4%

Parish, School and Diocesan Human Resources, Victim Assistance, Safe Environment Certification

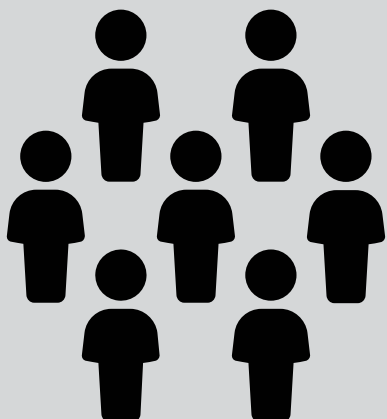


### **Communications:** 2018 ~ 4% | 2019 ~ 4%

Archivist, Communications, Florida Catholic Newspaper, Faith Fit App

**2018** 119 Corpus Christi Society Members  
828 Lumen Christi Society Members  
21,572 Fidelis Society Members

**2019** 121 Corpus Christi Society Members  
155 Spes Christi Society **NEW**  
719 Lumen Christi Society Members  
20,839 Fidelis Society Members

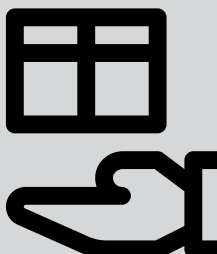


2018 Donors  
Contributed  
**41,814**

2019 Donors  
Contributed  
**40,278**

2018 Average Gift  
**\$397**

2019 Average Gift  
**\$408**



# Our Giving Societies



**Corpus Christi Society**

**"Body of Christ"**

\$10,000 + annual gift



**Lumen Christi Society**

**"Light of Christ"**

\$2,500 to \$4,999 annual gift

Not everyone can make the same size gift,  
but everyone can make the same size sacrifice.





OUR CATHOLIC APPEAL

The Catholic Foundation of Central Florida



**Spes Christi Society**

**"Hope of Christ"**

\$5,000 to \$9,999 annual gift

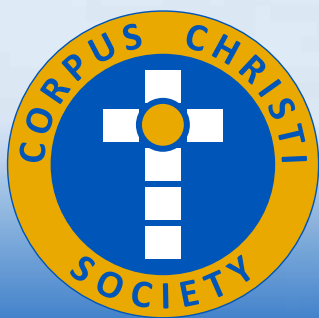


**Fidelis Society**

**"The Faithful"**

Any size gift for  
5 consecutive years

All contributions from the smallest to  
the largest are gratefully appreciated.



# Corpus Christi Soc

Latin for "Body of Christ," the Corpus Christi  
leaders who made a gift of \$10,000 or more

## 2018

Anonymous

Joseph and Kim Algero

Selim and Huguette Ayoub

Timothy and Anita Behler

Diane and Frank Bergau

Albert and Mary Bergeron

Joe and Carol Bert

Michael and Melissa Bianculli

James and Brenda Bond

Kevin and Jennie Bowler

Harry and Sharon Brandt

Eric and Cherie Brinkman

Christopher and Maureen Brockman

Michael and Jetnareth Broom

Patrick and Beth Brown

Dr. Barbara Bunster-Bornstein

†John and Alice Burgess

Kenneth and Mary Pat Burke

Mrs. Julie Burkey

Jim and Lisa Burrell

Edmund and Susan Cain

Mr. Andrew P. Caneza

Larry and Cece Carroll

Tom and Peggy Chandler

Patrick and O'Ann Christiansen

Mr. Gerard Close

Mrs. Jean Corr

Peter and Deborah Costello

Estefano and Norma Crisafi

Mr. Nicholas Degel

Mrs. Mary Demetree

David and Lynda Dennis

William Dingman and Debra Wert

David and Anne Dore

James and Deborah Doyle

James and Lorraine Durrell

Ms. Cathy Engelman

Michael and Fredrika Erdman

Ernest and Tina Euler

Orlando and Carolyn Evora

Thomas and Joan Flavin

Rawls and Teresa Fortenberry

Edward and Karen Gallagher

Mr. Clarence P. Geis

Mrs. Shirley Geitner

Mike and Pam Gilardi

Leida Haddock and Robert Wright

Andrew and Linda Hannigan

Mrs. Helene A Harmon

Alfred and Mary Harms

Mrs. Rose Haynick

Tony and Laura Hemgesberg

Ron and Celeste Henkelman

Miss Gretchen Hofmann

Eric and Diane Holm

Richard and Josephine Irumudomon

Michael and Aimee Kakos

Samuel and Constance Kaleel

Joseph and Nan Kearn

Allan and Linda Keen

Mark and Cindy Keenan

Christopher and Lisa Killer

Robert and Judy Kryger

Chip and Ann Landon

Richard and Frieda Licursi

Douglas and Jennifer Lieb

Jerry and Lois Locey

Brian and Janet Lower

Michael and Catherine Manese

Mel and Kitty Martinez

Harvey and Carol Massey

Mr. Charles McNulty

Carl and Maritza Mitchell

John and Ultima Morgan

Larry and Lisa Mullinax

Mr. Thomas Myers

James and Mary Nealy

Dr. Michael A. Nocero, Jr.

Francisco and Gloria Noda

Dennis and Jillian O'Connor

Kevin and Mary O'Donnell

Mr. George O'Neill, Jr.

Mark and Robin Ogier

Gordon and Christina Olson

Bill and Jody Orosz

Louis and Paulette Paradiso

Randolph and Thelma Perdue

Mr. Michael A. Perry

Mr. Richard Pesola

Randy and Kathy Poliner

Tom and Selby Prince

Terry and Jeanne Quigley

Pat and Louise Rainey

Jose and Pearl Ramirez

Juan and Maria Rivera

Steve and Susan Rosbury

Mrs. Marilyn C. Russell

Dwight and Isabel Saathoff

Ms. Janice Salerno

Joe and Penny Savona

Peter and Teresa Schaefer

John and Helen Schaffer

Lee and Mariann Schmudde

Mrs. Marilyn Sciortino

Hanscy and Sandra Seide

Richard and Dolores Shantz

Todd and Lisa South

David and Mary Spacone

Stephen and Cindy Strube

Lawrence and Kelley Teixeira

Steven and Jill Thagard

Keith and Donna Van Allen

Mrs. Theresa Wahl

Robert and Mary Wells

Roderick and Mary Whelan

George and Charlotte White

Thomas Winters and Rebecca Moroosse

Frank and Nita Witt

Steve and Lori Zepf

Robert and Renda Zielke

Victor and Jaquelynn Zollo





# Society Members

Sti Society is a group of generous and faithful Catholic  
e to Our Catholic Appeal.

## 2019

Anonymous  
Selim and Huguette Ayoub  
Timothy and Anita Behler  
Frank and Diane Bergau  
Albert and Mary Bergeron  
Joe and Carol Bert  
Michael and Melissa Bianculli  
Kevin and Jennie Bowler  
Paul and Susan Boylan  
Eric and Cherie Brinkman  
Christopher and Maureen Brockman  
Patrick and Beth Brown  
Dr. Barbara Bunster-Bornstein  
Mrs. Alice Burgess  
Kenneth and Mary Pat Burke  
Mrs. Julie Burkey  
Jim and Lisa Burrell  
Edmund and Susan Cain  
Mr. Andrew P. Caneza  
Larry and CeCe Carroll  
Tom and Peggy Chandler  
Ms. Roberta Cheever  
Patrick and O'Ann Christiansen  
Mrs. Jean Corr  
Peter and Deborah Costello  
Estefano and Norma Crisafi  
Ron and Paula Davoli  
James and Patricia Dawson  
Mr. Nicholas Degel  
Mr. Frank J. Deluca  
Mrs. Mary Demetree  
David and Lynda Dennis  
William Dingman and Debra Wert  
David and Anne Dore  
James and Deborah Doyle  
Ms. Cathy Engelman  
Michael and Fredrika Erdman  
Ernie and Tina Euler  
Orlando and Carolyn Evora  
Ms. Virginia M. Farget  
Ms. Amber Farrell  
Gavin and Annette Ford

Edward and Karen Gallagher  
Mr. Clarence P. Geis  
Ms. Shirley Geitner  
Mike and Pam Gilardi  
† David and Christeen Gray  
Leida Haddock and Robert Wright  
Andrew and Linda Hannigan  
Mrs. Helene A Harmon  
Alfred and Mary Harms  
Mrs. Rose Haynick  
Tony and Laura Hemgesberg  
Ron and Celeste Henkelman  
Shaun and Georgette Hillary  
Miss Gretchen Hofmann  
Eric and Diane Holm  
Richard and Josephine Irumudomon  
Robert and Kathleen Jankowski  
Samuel and Constance Kaleel  
Joseph and Nan Kearn  
Allan and Linda Keen  
Mark and Cindy Keenan  
Christopher and Lisa Killer  
Robert and Judy Kryger  
Chip and Ann Landon  
Mrs. Cathy Lawrence  
Salvador and Jacqueline Leccese  
Richard and Frieda Licursi  
Douglas and Jennifer Lieb  
Brian and Janet Lower  
Mel and Kitty Martinez  
Harvey and Carol Massey  
Mr. Charles McNulty  
Carl and Maritza Mitchell  
John and Ultima Morgan  
Larry and Lisa Mullinax  
Mr. Thomas J. Myers  
James and Mary Nealy  
Dr. Michael A. Nocero, Jr.  
Francisco and Gloria Noda  
Kevin and Mary O'Donnell  
Mr. George O'Neill, Jr.  
Mark and Robin Ogier

Gordon and Christina Olson  
Bill and Jody Orosz  
Louis and Paulette Paradiso  
Mr. Richard Pesola  
Randy and Kathy Poliner  
Tom and Selby Prince  
Terry and Jeanne Quigley  
Pat and Louise Rainey  
Jose and Pearl Ramirez  
Daniel and Jill Renuart  
Melvin and Terri Riecher  
Mr. Donald Rieth  
Steve and Susan Rosbury  
Phillip and Lina Ruhlman  
Mrs. Marilyn C. Russell  
Dwight and Isabel Saathoff  
Ms. Janice Salerno  
Joe and Penny Savona  
Peter and Teresa Schaefer  
John and Helen Schaffer  
Lee and Mariann Schudde  
Mrs. Marilyn Sciortino  
Hanscy and Sandra Seide  
Richard and Dolores Shantz  
David and Mary Spacone  
Rick and Marlys Strube  
Stephen and Cindy Strube  
Steven and Jill Thagard  
Keith and Donna Van Allen  
Mrs. Theresa Wahl  
Robert and Mary Wells  
† Roderick and Mary Whelan  
George and Charlotte White  
Thomas Winters and Rebecca Moroosse  
Frank and Nita Witt  
Steve and Lori Zepf  
Robert and Renda Zielke  
Victor and Jaquelynn Zollo

† May God grant eternal rest to these faithful  
friends of the Church. They are greatly missed.



The Catholic Foundation  
of Central Florida  
PLANNED GIVING

# Leaving a Lasting Legacy



Planned Gifts Received

**\$2.43 Million**

Gifts

**48 60**

Families Gave

**37** New Commitments





**409**  
**Active Members**

## **Recipients Benefiting From Planned Giving**

Catholic Charities of Central Florida  
Diocese of Orlando, Shepherd's Fund  
and Seminarian Fund  
4 Catholic Schools  
22 Parishes

Note: Data is for fiscal 2018 & 2019 combined



**The Catholic Foundation**  
of Central Florida

INVESTMENT AND ENDOWMENT MANAGEMENT

# Endowments

## 2018 Total

\$ 49.5 Million in 109 funds

## 2019 Total

\$ 51.5 Million in 111 funds





Endowed funding provides a permanent source of revenue that supports the work of the Church in perpetuity. Your charitable impact is enhanced with our socially responsible investments. Your original gift is invested in compliance with our Catholic values and continues to grow, providing parishes, schools and other ministries with a steady stream of income.

## 2018 Endowment Highlights

**\$500,000** Parish operations

**\$202,000** Food, health, adoption and housing assistance throughout Central Florida

**\$187,000** Food, housing and tuition assistance for victims of Hurricane Maria

**\$79,000** Church leadership

**\$480,000** Catholic school scholarship and tuition assistance

**\$23,000** Catholic college and university

**\$1.471 Million total distributions**



## 2019 Endowment Highlights

**\$512,000** Parish operations

**\$258,000** Food, health, adoption and housing assistance throughout Central Florida

**\$146,000** Church leadership

**\$45,000** Clerical life

**\$933,000** Catholic school scholarship and tuition assistance

**\$30,000** Catholic college and university

**\$1.924 Million total distributions**

## Catholic College & University

2018 Total \$ 1,475,000 | 2019 Total \$1,500,000

Catholic Campus Ministry Endowment Fund (AIC)

Catholic Campus Ministry Endowment Fund

## Catholic Education

2018 Total \$ 18,665,000 | 2019 Total \$ 19,125,000

AIC Tuition Assistance

Adelaida Valdes Endowment Fund

Deforest W. and Margaret Y. Bullard Scholarship Fund

Fr. Frank Zammit Endowment Fund

Holy Redeemer Catholic School Endowment Fund

Our Lady of Hope Catholic Education Endowment Fund

Our Lady of Lourdes (Melbourne) School Endowment Fund

Resurrection Catholic School Endowment Fund

St. Timothy Catholic Church Educational Endowment Fund

The Michael Scheve Endowment Fund

The St. Teresa Catholic School Endowment Fund

Tuition Assistance Scholarship Endowment Fund

Xavier Leyva Quintana Scholarship Endowment Fund

## St. John Vianney Catholic School

St. John Vianney Catholic School Endowment Fund

The Sister Elizabeth Murphy Tuition Assistance Fund

## Church of Our Saviour Catholic School

Church of Our Saviour Catholic School Endowment Fund

Fr. Sean Heslin Scholarship Endowment Fund

## Father Lopez Catholic High School

Leonard T. (Pat) Murphy Scholarship Endowment

Bud Farmer Scholarship Fund

The Ian A. Gilmore Memorial Scholarship Endowment

The Dorothy and Walter Shelley Family Scholarship Endowment Fund

The Henry S. Sitkowski Memorial Scholarship Endowment

The Jillian Elizabeth Blais Memorial Scholarship Endowment Fund

The Sylvia Hope Horrigan Memorial Scholarship Endowment

## Bishop Moore Catholic High School

Guardian Angel Endowment Fund

Joe Skinner Endowment Fund

Ann Hefferin Memorial Endowment Fund

Dave Powers Memorial Endowment Fund

Dawn Michelle Aberwald Memorial Endowment Fund

Joe Cadden Memorial Scholarship Endowment Fund

Kelly Reen Memorial Fund





## Church Leadership & Development

2018 Total \$ 8,800,000 | 2019 Total \$ 8,900,000

The Catholic Foundation of Central Florida Endowment Fund  
Recruiting and Forming Clergy and Lay Leaders Endowment Fund (AIC)

## Clerical Life

2018 Total \$ 1,900,000 | 2019 Total \$ 2,500,000

Priests' Retirement Fund  
Bishop Dorsey Endowment  
Prince-Olson Family Vocation Scholarship Endowment Fund  
Seminarian Fund

## Outreach Ministries

2018 Total \$ 6,100,000 | 2019 Total \$ 6,200,000

Bishop Grady Villas Sr. Elizabeth Marie Stoup Endowment Fund  
Bishop Thomas G. Wenski Endowment Fund for Charity  
Catholic Charities Endowment Fund (AIC)  
Catholic Charities of Central Florida, Inc. Endowment Fund  
Fred Enck Justice Ministry Endowment Fund  
The Hackl Family Endowment for Charity

## Parish Life

2018 Total \$ 12,600,000 | 2019 Total \$ 13,300,000

Albert J. and Christine M. Hackl Endowment Fund for the Benefit of Holy Spirit Church  
All Souls Catholic Church Capital Improvement Fund  
All Souls Catholic Church Endowment Fund  
Annunciation Catholic Church Endowment Fund  
Ascension Catholic Church Endowment Fund  
Basilica of St. Paul Endowment Fund  
Blessed Sacrament Catholic Church, Clermont Endowment Fund  
Blessed Trinity Catholic Church, Ocala, Endowment Fund  
Blessed Trinity Catholic Church, Orlando Endowment Fund  
Church of our Saviour Endowment Fund  
Church of the Epiphany Endowment Fund  
Church of the Nativity Endowment Fund  
Corpus Christi Catholic Church Endowment Fund  
Divine Mercy Catholic Church Endowment Fund  
Holy Family Catholic Church Endowment Fund  
Holy Name of Jesus Catholic Church Endowment Fund  
Holy Spirit Catholic Church, Lake Wales Endowment Fund  
Holy Spirit Catholic Church, Mims Endowment Fund  
Immaculate Conception Catholic Church Endowment Fund  
Immaculate Heart of Mary Catholic Church Endowment Fund  
Most Precious Blood Catholic Church Endowment Fund





Our Lady of Grace Catholic Church Endowment Fund  
Our Lady of Hope Catholic Church Endowment Fund  
Our Lady of Lourdes Catholic Church, Daytona Beach  
Endowment Fund  
Our Lady of Lourdes Catholic Church, Melbourne  
Endowment Fund  
Our Lady of the Springs Catholic Church Endowment Fund  
Our Lady Star of the Sea Endowment Fund  
Prince of Peace Catholic Church Endowment Fund  
Queen of Peace Catholic Church Endowment Fund  
Resurrection Catholic Church, Winter Garden  
Endowment Fund  
Sacred Heart Catholic Church Endowment Fund  
St. Andrew Catholic Church Endowment Fund  
St. Ann Catholic Church, Debary Endowment Fund  
St. Ann Catholic Community, Haines City Endowment Fund  
St. Anthony Catholic Church Endowment Fund  
St. Augustine Catholic Church Endowment Fund  
St. Brendan Catholic Church Endowment Fund  
St. Catherine of Siena Catholic Church Endowment Fund  
St. Charles Borromeo Catholic Church Endowment Fund  
St. Faustina Catholic Church Endowment Fund  
St. Francis of Assisi Catholic Church Endowment Fund  
St. James Cathedral Endowment Fund  
St. John Neumann Catholic Church Endowment Fund

St. John Vianney Catholic Church Endowment Fund  
St. Joseph Catholic Church, Orlando Endowment Fund  
St. Joseph Catholic Church, Palm Bay Endowment Fund  
St. Joseph Catholic Church, Winter Haven Endowment Fund  
St. Joseph, Lakeland, Catholic Church Endowment Fund  
St. Mark the Evangelist Catholic Church Endowment Fund  
St. Mary Catholic Church Endowment Fund  
St. Mary of the Lakes Catholic Church Endowment Fund  
St. Matthew Catholic Church Endowment Fund  
St. Matthew Catholic Church Endowment Fund (OCA)  
St. Maximilian Kolbe Catholic Church Endowment Fund  
St. Patrick Catholic Church Endowment Fund  
St. Paul Catholic Church Endowment Fund  
St. Peter Catholic Church Endowment Fund  
St. Philip Phan Van Minh Endowment Fund  
St. Stephen Catholic Church Endowment Fund  
St. Teresa Catholic Church, Titusville Endowment Fund  
St. Theresa Catholic Church, Belleview Endowment Fund  
St. Timothy Catholic Church Endowment Fund  
St. Vincent de Paul Catholic Church Endowment Fund  
Sts. Peter and Paul Catholic Church Endowment Fund  
The Assets of the Endowment Fund of the Basilica of  
Mary Queen of the Universe Shrine







## National Awards

The Catholic Foundation earned a record five awards for stewardship excellence in 2019 and two awards in 2018. The national awards were granted by the International Catholic Stewardship Council. The International Catholic Stewardship Council recognizes organizations that best promote the theology of stewardship and best practices of Catholic philanthropy.

### 2019 Awards

Annual Appeal Video  
 Annual Appeal Poster  
 Total Planned Giving Effort  
 Total Foundation Effort (*Honorable Mention*)  
 Appeal Brochure (*Honorable Mention*)

### 2018 Awards

Total Foundation Effort  
 Total Planned Giving Effort (*Honorable Mention*)





# The Catholic Foundation of Central Florida

## Statements of Financial Position

### Assets

		June 30	
		2019	2018
<b>ASSETS</b>			
	Cash and cash equivalents	\$884,696	\$838,208
	Investments	6,183,085	5,510,208
	Investments restricted for long-term purposes	12,366,079	11,818,319
	Agency funds held	38,284,744	40,221,162
	Other assets	757,813	683,093
	<b>Total assets</b>	<b>\$58,476,417</b>	<b>\$59,070,990</b>

### Liabilities and Net Assets

<b>LIABILITIES</b>	Accounts payable and accrued expenses	\$10,060	\$8,967
	Agency obligations	38,284,744	40,221,162
	Other liabilities	717,776	501,980
	Deferred revenue	150,293	143,100
	<b>Total Liabilities</b>	<b>\$39,162,873</b>	<b>\$40,875,209</b>
<b>NET ASSETS</b>			
	Without donor restrictions	1,046,870	943,959
	With donor restrictions	18,266,674	17,251,822
	<b>Total net assets</b>	<b>19,313,544</b>	<b>18,195,781</b>
	<b>Total liabilities and net assets</b>	<b>\$58,476,417</b>	<b>\$59,070,990</b>

**Audited by Batts Morrison Wales & Lee, P.A.**  
**Audited Financial Statements are available upon request.**



# Statements of Activities

For the Year Ended

## Public Support and Revenue and Net Assets Released From Time and Use Restrictions

	June 30	
	2019	2018
Development and stewardship service fees	\$2,005,094	\$2,101,060
Investment management service fees	250,257	251,308
Campaign service fees	217,090	202,898
Investment income, net - with donor restrictions	841,966	824,464
Investment income, net - without donor restrictions	828,922	1,004,981
Net assets released from time and use restrictions	24,067	16,172
Total public support and revenue and net assets released from time and use restrictions	\$4,167,396	\$4,400,883

## Expenses

### Program activities

Our Catholic Appeal	873,997	747,886
Distributions to other Diocesan and Catholic entities	554,913	509,645
Parish campaigns	354,785	257,172
Major and planned giving services	290,422	184,128
Investment management services	126,039	118,837
Educational campaigns	124,170	41,713
Offertory enhancements	100,246	135,146
Alive in Christ	7,116	101,571
Total program activities	2,431,688	2,096,098

### Supporting activities

Management and general	617,945	597,028
Total supporting activities	617,945	597,028
Total expenses	3,049,633	2,693,126

Change In Net Assets	1,117,763	1,707,757
NET ASSETS - Beginning of year	18,195,781	16,488,024
NET ASSETS - End of year	\$19,313,544	\$18,195,781

Audited by Batts Morrison Wales & Lee, P.A.  
Audited Financial Statements are available upon request.

"If we wish to serve God and love our neighbor well, we must manifest our joy in the service we render to Him and them."

-St. Katharine Drexel



**The Catholic Foundation**  
of Central Florida  
Inspire Giving. Fund God's Work.