



Catholic Foundation

OF OKLAHOMA

2020
ANNUAL REPORT



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Dear Brothers and Sisters in Christ,

Saint Luke reminds us, “From everyone to whom much has been given, much will be required.” Indeed, everything we have, everything we are and everything we will become is a gift from God. As good stewards of those gifts, we are called as Catholics to assist our neighbors in need through prayer, financial assistance, and volunteering time and expertise.

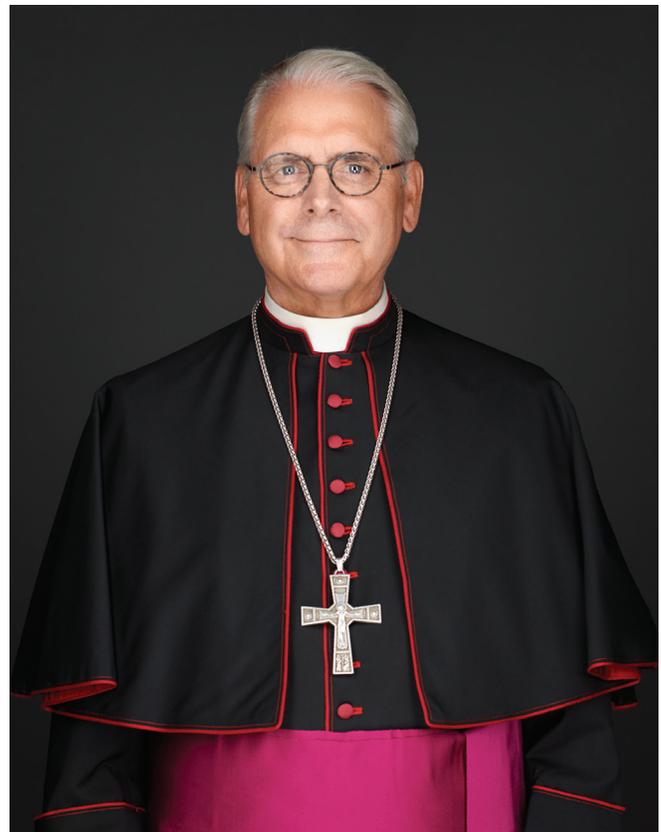
The Catholic Foundation supports our call to service in central and western Oklahoma by seeking creative and effective financial solutions for all of our parishes and ministries. The foundation also provides for future generations of Catholics through its many endowment funds while maintaining a strong Catholic identity. It is committed to ensuring that all investments and grant recipients align with Catholic teaching.

You are an integral piece of the foundation’s efforts to secure the future of our parishes and the Catholic Church in Oklahoma.

I am grateful for your continued support of these faith-filled initiatives through the Catholic Foundation of Oklahoma. I hope that as you read the 2020 Annual Report, you will strengthen the foundation’s capacity to support the Archdiocese of Oklahoma City in its mission to proclaim the Good News of Jesus Christ by considering a gift to the foundation in your will.

Thank you for answering God’s call to assist in the evangelization efforts of our Church to “Go make disciples.” With the assurance of my prayers and best wishes, I am sincerely yours in Christ,

Most Reverend Paul S. Coakley
Archbishop of Oklahoma City,
Chairman



Dear Friends,

One of the greatest honors of my professional career happened in February when I was named executive director of the Catholic Foundation of Oklahoma. I anticipate wonderful things for the foundation and its impact on the Catholic community in our state.

Throughout its 56-year history, the Catholic Foundation has worked to ensure a strong Catholic presence in ministry, education and service. For generations, those before us have made generous gifts during their lifetimes and have left gifts in their wills to establish their own personal Catholic legacy.

These gifts have created endowments that support the formation of seminarians, scholarships for children in Catholic schools, and grants to rural and urban parishes for everything from new hymnals to security systems. Stories about some of these programs are included in this annual report. You also will read about grants that have helped foster religious education, funded mission trips and helped with much-needed church renovations.

The Catholic Foundation provides families like yours with several opportunities to help the Church grow. These range from Charitable Gift Annuities that provide lifetime income back to donors to a Donor Advised Fund that allows you to advise on grants in the future. There are many ways to aid the foundation's work in the Catholic community! Our story in this annual report about a Donor Advised Fund established by a faith-filled family in Enid provides a wonderful example of gift-giving paying dividends for the Church and for the family.

As executive director, my goal is to increase giving to the foundation through various strategies, including a renewed focus on tax advantageous gift planning that may be of benefit to you. We seek to align the foundation's efforts with the goals outlined by Archbishop Coakley in his Vision 2030 Pastoral Plan. (You can find the plan at archokc.org/Vision2030.)

Strengthening the foundation with sound, responsible stewardship will help the Church expand and flourish in central and western Oklahoma for generations to come.

I ask for your prayers, and thank you for your generous support.

Peter L. de Keratry, KM Executive Director





An Easy Way to Give

David and Sharon Trojan of Enid enjoy the opportunity to GIVE to the Catholic community of Oklahoma. Sharon came up with the acronym, which stands for Gifts for Catholic purposes, Investing in the future of the faith, Volunteering financially and physically, and Enduring commitment.

A Donor Advised Fund through the Catholic Foundation of Oklahoma provides the Trojans with the perfect tool to meet their needs.

Donor Advised Funds are similar to charitable investment accounts. Cash, securities or other assets can be contributed to a DAF, with a minimum amount of \$10,000. Funds can be invested for tax-free growth and donors can recommend grants to virtually any IRS-qualified public charity and used for charitable purposes. They are one of the easiest and most tax-advantageous ways to give to charity.

David, an attorney, is a former CFO board member and chairman. During his time on the board, he became keenly aware of the many needs of Oklahoma's parishes and schools, and pitched to Sharon the idea of creating a Donor Advised Fund. Sharon, a certified public accountant, agreed with the benefits of being able to make donations when needs arose, and the tax planning advantage of being able to "bunch" charitable deductions to establish and contribute to a Donor Advised Fund.

The Trojans have made many contributions since establishing their DAF in October

2005. These include helping with building and capital campaigns such as "One Church Many Disciples," St. Joseph Catholic School in Enid and St. John University Center in Stillwater.

When Catholic opportunities and needs arise, they can request distributions directed to those needs. The Trojans have done so for Catholic Charities, the Archdiocesan Annual Catholic Appeal, the Catholic Relief Fund, sponsorship



of youth group activities, in memory of deceased priests, scholarships, educational opportunities for priests and the Catholic community, and other causes.

This is a family commitment for the Trojans. They have named their sons as successor advisers for their fund, allowing them to continue to determine the fund's stewardship opportunities through the foundation.

Sharon and David also have encouraged many friends to create a Donor Advised Fund. The reason, Sharon says, is simple:

“It’s for Catholic purposes, and it’s an enduring commitment. The purpose is because we want our faith to grow.”



The Trojan Family

Helping Youth Spread the Gospel

In March 2019, 14 high school students and six adults from Our Lady of Victory Parish in Purcell traveled to Yabucoa, Puerto Rico, for a mission trip that still resonates with those who went.

The group spent each day helping to repair a chapel that had been damaged by a hurricane 18 months earlier. That experience, and others, proved profoundly moving.

One of those was a house-to-house visit one day with older shut-in residents of the village, to deliver food provided by Caritas Internationalis, a Catholic relief group.

“These were poor people,” says Father Jim Chamberlain, who was Our Lady’s pastor at the time. “They all had little block homes with tin roofs. I think that was probably the most important day for the kids. ...That was a powerful experience.”

Chelle McCaskill, one of the adult leaders, was moved immediately by the locals’ response to the group’s arrival.

“They were just beautiful people,” she said. “It was so impactful when they said, ‘We have been praying and praying for help, and you are the answer to our prayers.’”

The group stayed at a retreat center run by Dominican priests. Each evening ended with a devotional and songs. On the final night, Father Chamberlain celebrated Mass in the chapel attended by many local families.

“It was kind of their way of thanking us,” he said. “Many of the kids were in tears. A couple of



Students from Our Lady of Victory in Purcell visit shut-ins in Yabucoa, Puerto Rico



Students from Our Lady of Victory in Puerto Rico

boys who were not very expressive of emotion were in tears because of the way they felt when the people showed their gratitude. That articulated to me the impact the trip made.”

McCaskill says that even today, she gets choked up talking about the trip. As for the students, she put it this way:

“I can tell you, it changed several of them. ...The mission trip really, really impacted the kids on a spiritual level.”

The Catholic Foundation of Oklahoma played an important role by providing an Education and Evangelization Grant. The students also raised money through sales of tamales, baked goods and a Mardi Gras auction.

Chamberlain noted that many of the children who made the mission trip had modest means.

“They wouldn’t have been able to go without the foundation’s help, there’s no question,” he said.

Saluting Our Top RE Teacher

In the view of Father Tim Ruckel, pastor of Our Lady of Sorrows Parish in Chandler, Kendra Miller is the perfect fit as director of religious education.

“She knows how to reach out to the parents and talk to them,” Father Ruckel says. “At the kids’ level, she’s there welcoming them. ...Kendra knows how to come down to that child’s level, whether they’re in high school or in grade school.”

Miller’s work led to her being selected as 2020 Religious Educator of the Year by the Catholic Foundation of Oklahoma. The Catholic Foundation of Oklahoma presents the award every year for “outstanding leadership in Catholic education.” Last year’s other two finalists were Alicia Rios of Saint Joseph Parish in Norman and Chase Hohnke of Sacred Heart Parish in El Reno.

Miller, an elementary school teacher for nearly 30 years, has volunteered as a religious education catechist for 14 years. Father Ruckel’s introduction to Miller came soon after he was assigned to Our Lady of Sorrows, and Saint Louis in Stroud, in 2018. At that time, he says, the religious education program was struggling.

“With the program almost in limbo, she stepped in and just gained the respect of the parents,”

he says. Miller also helped the catechists with their needs, and connected with the children, whether through cookouts, Halloween “trunk or treat” parties or a monthly children’s Mass.

Before long, Father Ruckel says, the CCD program “was flourishing.”

“The parish was like Grand Central Station on Wednesday evenings,” he says. “Just a vibrant atmosphere. It just brought joy to your heart.”

The COVID-19 pandemic slowed that momentum, although Father Ruckel says he was heartened to see more youth returning to Mass this year as conditions continued to improve. He is optimistic.

The Catholic Foundation of Oklahoma honor includes \$500 for the winner and a \$5,000 grant for Our Lady of Sorrows. Father Ruckel says that due to the pandemic, the parish hasn’t yet spent its grant money. He is thrilled to have it, however, and says that with Miller leading the way, the money is sure to help children from Our Lady of Sorrows and Saint Louis grow in their faith.

**“I’m so blessed to have her,”
Father Ruckel says.**



Kendra Miller
Director of Religious Education
at Our Lady of Sorrows Parish



Saint Rose of Lima
Perry

Restoring a Church's Glory

The founders of St. Rose of Lima Parish in Perry did it right when they built the church nearly 100 years ago. The structure featured 39 beautiful stained-glass windows, several crafted by artists in the Munich Studios of Chicago.

Current and former members of the parish, with an assist from the Catholic Foundation of Oklahoma, are making sure those windows are around for the church's second century.

Weather and decomposition caused several of the windows to decay on the church. With an eye on the church's 2023 centennial, parish leaders began a campaign to raise the roughly \$160,000 needed to restore the windows. One of those parishioners was Allison Stevens, a parish council member and active volunteer who led the fundraising efforts.

"We had to do it in three rounds," Stevens says. "There were three large, more structurally significant windows that had to get repaired immediately. We used whatever funds we had in our church building fund at that point to get it going."

From there, determinations were made on which windows needed to be repaired based on their deterioration. Only a few didn't need at least some work, Stevens says.

Fundraising within the parish was more successful than anticipated. "I was really amazed by the contributions from descendants and from people who no longer attend the church but grew up here," Stevens says.

In July 2019, the church received a grant of \$28,652 from the Catholic Foundation of Oklahoma, in partnership with the Bobby Dean Little Trust.

That grant "was very significant," Stevens says. It came at the outset of the larger campaign and "filled in a hole when we didn't know where we were going to come up with it."

Now, the church has met its fundraising goal and completed the restoration, and is looking forward to celebrating St. Rose's centennial.

Stevens, who grew up in the parish and returned to it about 10 years ago with her husband and children, said she has seen a renewed appreciation among parishioners for the beauty of the art work embodied in the windows.

"It's a sense of, we could lose these and there's not any great option to replace this," she says. "It really got people interested in our history and also thinking, 'What do we want it to be in the next 50 years?'"



Students at the piano purchased for St. Mary of Ponca City through a Catholic Foundation grant

Funding Music, Arts in Schools

Officials at St. Mary Catholic School in Ponca City found themselves in a pickle in 2019 after their digital piano petered out. A grant from the Catholic Foundation of Oklahoma helped get them out of it.

The piano is used by students who wish to learn how to play, and they are featured in the school's annual end-of-year talent show and St. Mary's Christmas and spring music programs. Without an instrument of its own, the school had to rely on piano instructor Angela Bunch to provide her personal instrument—hardly ideal.

The school applied for a grant from the foundation, received one, and used it to

purchase a new digital piano that, as bad luck would have it, arrived at about the same time COVID-19 shut down everything.

“We had it in time to use for last year’s spring program,” Bunch recalls. “But the kids were out for spring break and then wound up being out for the rest of the year.”

This school year was much better. In-person classwork resumed in August, allowing Bunch to tutor her roughly two dozen students in grades 1 through 8. The children played their piano Christmas solos as usual, with the performances recorded and posted to the school’s Facebook page. Bunch planned to do the same with a spring 2021 piano program.

She is grateful for the new piano because she has seen the impact the instrument has had on students.

“Over the years I’ve had several students who struggle with various things, and piano became

something they had—it was their time to shine,” Bunch says. “Before piano, maybe they just hadn’t found their niche yet.”

One boy who was a sixth-grader during the 2020-21 school year matched that profile. Bunch says he wasn’t an athlete and had some difficulty fitting in in other ways.

“He has taken off with this,” she says. “He loves performing and learning his song and playing it in front of everyone. He had not found

something that was HIS passion. It’s really been awesome to watch him flourish.”

The youngster is one of scores of students who have benefited from exposure to the instrument.

Thanks to the foundation, many more at St. Mary in Ponca City will get the same opportunity to find their niche.



Students at St. Mary in Ponca City enjoying their new piano



A Loving Legacy

Janie Brunette will tell you she owes a great deal to her Catholic school education. An endowment in her parents' name helps provide the same opportunity for students at St. James the Greater Catholic School in Oklahoma City.

In 2015, Brunette and others started the Mildred and Clair Brunette Family Memorial Endowment, which is managed by the Catholic Foundation of Oklahoma. The purpose of the endowment is to help with books and other learning materials.

Her parents “were one of the founding families at St. James” and active volunteers, Janie says. She recalled that one of “Millie” Brunette’s last volunteer stints at the school was tutoring students and helping to teach them to read.

After her mother’s death in 2015, Janie said, she wanted to use her inheritance to create something “that would be a legacy and something my parents would be proud of.”

Her parents “always believed in the future,” she said. “They were always good savers and always believed in Catholic education and the Catholic way of life.”

Janie, who made her career in hospital administration and as a clinical nurse specialist, noted that she and her six siblings all attended St. James and then Mount St. Mary Catholic High School.

“I know that I and my family, any of the kids, would not be successful professionals had we

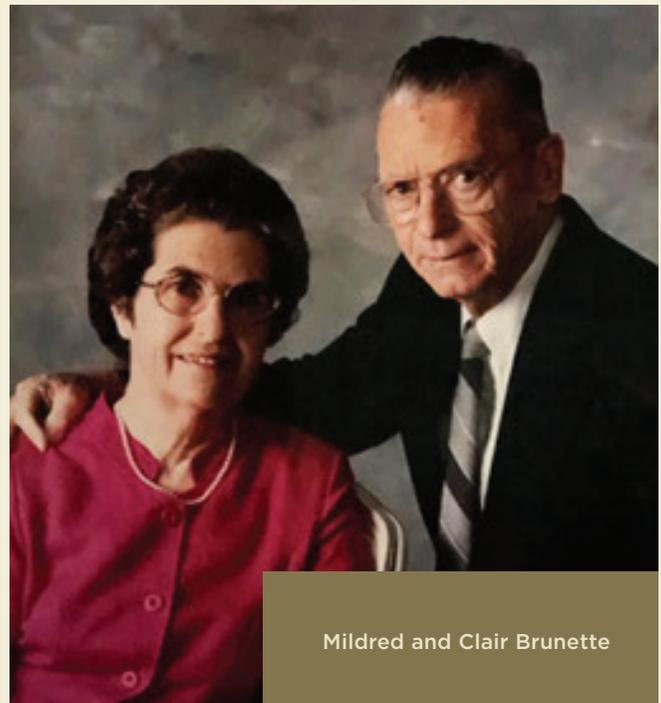
not had the type of education we had through St. James and the Mount,” she says. “This is something that allows the family to live on.”

Annual distributions from the endowment total about \$600. For the 2020-21 school year, the money went to help pay for badly needed computer upgrades—Janie Brunette and other family made personal donations to cover much of the cost.

The principal at St. James, Alicia Vazquez, is grateful for the annual payout from the Brunette endowment. Computer programs are on her wish list.

“There are lots of programs we can get, especially the way our students learn in these times. We have to keep up with the way they learn,” Vazquez said.

More books for the library always are an option. The school has made sure students are aware of the Brunettes’ gift.



Mildred and Clair Brunette

Tech Upgrades Pay Off

After arriving as pastor of St. Peter the Apostle Parish in Guymon in 2018, Father Christopher Brashears identified a clear need to improve internet access. A grant from the Catholic Foundation of Oklahoma helped meet that need.

The grant paid for internet upgrades, along with the purchase of 10 televisions and 10 Chromecast devices, leaving the parish much better able to serve students and families through online education offerings.

The parish essentially “had nothing” previously, Brashears says. “They had very slow internet. You couldn’t stream movies on it—even streaming one movie would be asking a lot, never mind having multiple rooms watching.”

Brashears, 40, grew up during the digital revolution and is comfortable with the many media platforms available to help promote the faith. He is a big fan of formed.org, the Catholic website that offers thousands of programs, movies and books.

Prior to the technical upgrades, St. Peter’s religious education teachers used books only. Now, “they’ve incorporated a lot of formed.org into their classes,” Brashears says. “We have entire group studies based around some of their programming.

“We did the Real Presence program from formed.org. It’s a real nice study on the real presence of Christ in the Eucharist. We’ve done different Bible studies. The Confirmation class uses streaming from the Chosen series.”

The list goes on. Ultimately, the upgrade provided the parish with an invaluable way to reach young people where they are most comfortable. Parents are enjoying it, too, as illustrated by one mother’s reaction.

“She came up recently and said, ‘Oh Father, I heard you talk about it but had never gotten on. But I’ve been binge-watching this stuff since my daughter set it up for me.’”

Formed.org’s resources are available in Spanish, which is especially important for St. Peter the Apostle Parish given its large Hispanic population.

The foundation grant proved especially beneficial after the COVID-19 pandemic ended in-person Masses for a time. Without the new technology, Brashears notes, the parish would not have been able to live-stream its Masses, which were well received.

Also popular during COVID was an online series called Not by Bread Alone. “It really took off among the Latino community,” Brashears says.



Father Jerome Krug instructs Religious Education students at St. Peter the Apostle Parish in Guymon

Easing Students' Burdens

With help from the Catholic Foundation of Oklahoma, Noah Staudt is on his way to becoming an engineer. Another student, Taylor Akin, plans to do software development upon graduation. Yet another, Dominick Denney, is studying for the priesthood.

They are among the scores of students who have earned scholarships through the foundation. This year, the Catholic Foundation of Oklahoma awarded more than \$100,000 to 77 students in the archdiocese. These scholarships are based on scholastic achievement, service to the church and community, and financial need.

Staudt, of Guthrie, is a member of St. Mary Parish and a graduate of Mount St. Mary Catholic High School. He used the Catholic Foundation of Oklahoma scholarship awarded in 2017 to attend Oklahoma State University, where he earned a double degree in aerospace engineering and mechanical engineering.

Akin, of Purcell, is a member of Our Lady of Victory Parish. He won a Catholic Foundation of Oklahoma scholarship in 2019 and used it to help defray costs at Princeton University. Akin received other grants and aid, but is grateful for the foundation scholarship because it fills gaps where other scholarships can't.

Denney, from St. Francis Xavier Parish in Enid, is a junior studying philosophy at Conception Seminary College in Missouri. The foundation awarded him a four-year scholarship worth \$1,500 per year.

"It's a big help," Denney says. "Most people don't know that college seminarians pay their own room and board, about \$13,000 per year. Anything helps, honestly."

Denney says the cost of seminary can cause young men to choose another path instead of the priesthood. His mother, Regina, encouraged him to apply for all the aid he could, including through the Catholic Foundation of Oklahoma, as did his former pastor, Father Joseph Irwin.

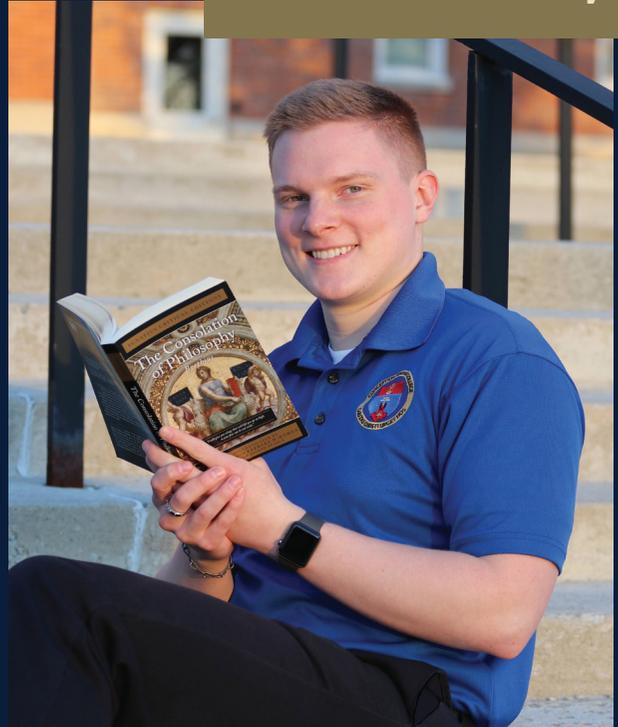
Denney also knew of the foundation opportunity because his sister, Katherine, had won a Catholic Foundation of Oklahoma scholarship that helped her attend the University of Oklahoma.

Denney said the first few years at seminary were difficult, especially his sophomore year when the COVID-19 pandemic led to students being sent home. After so much turbulence, "this year has proved to be very fruitful in regard to my prayer life, my formation and my academics," he says.

Meredith Malatin



Dominick Denney



“I’m definitely where God wants me to be. I am confident and at peace saying that.”

Lan Anh Do



Information is available at cfook.org/grants-awards.

Making Catholic Education Possible

Father Danny Grover has enjoyed Bishop McGuinness Catholic High School sporting events since his time as a student there. One night at the basketball gym stands out, however.

It was the homecoming game in February where Grover received a phone call with great news—the Catholic Foundation of Oklahoma could help pay to send 30 Burmese children from his parish, Corpus Christi in Oklahoma City, to St. Charles Borromeo Catholic School in Oklahoma City.

“I’ll never forget it,” Grover said.

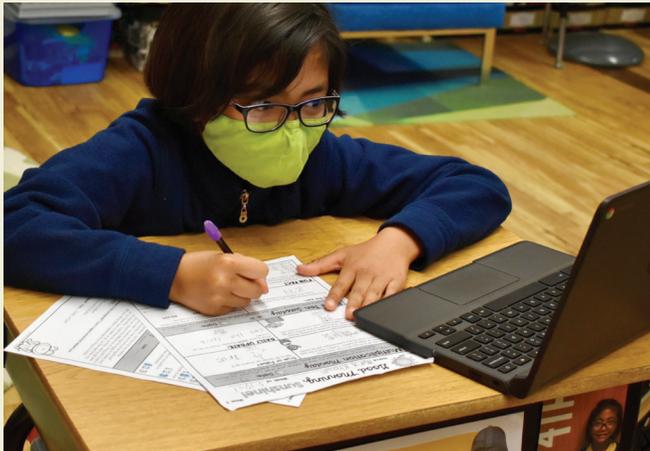
The effort to give these children a Catholic education began soon after Grover arrived as pastor at Corpus Christi in July 2016. He found that roughly 45 percent of parishioners at the time were first-generation immigrants from Myanmar; their children all attended public schools, even though, as Grover said,

the Burmese people make up “one of the most Christo-centric communities that I have ever been a part of.”

Grover began exploring possibilities. At one point, the bishop from Myanmar came to Oklahoma City and visited with Grover and Archbishop Paul Coakley about the immigrant families and their education goals. The Myanmar bishop was so enthused, he subsequently assigned one of his priests,



Some of the Burmese students from St. Charles Borromeo



Father Titus Pau, to Corpus Christi.

Meetings with families showed that 30 children would be interested in a Catholic school education. Grover approached Todd Gungoll, principal at St. Charles Borromeo, which is located not far from a Habitat for Humanities neighborhood that is home to several Corpus Christi families.

Gungoll and other school leaders were interested in helping the students. A hurdle, however, was the \$90,000 gap between what the families could pay and the school’s costs.

Grover then turned to Peter de Keratry, head of development for the archdiocese. “I told him, ‘I’m not a fundraiser, how do I raise \$90,000?’” Grover said.

The answer: Use funds from Catholic Foundation of Oklahoma and from the state of Oklahoma’s tax credit scholarship fund. Doing so allowed the 30 students to enroll for the 2020-21 school year, and will help to keep them—and new students—at St. Charles in the years ahead.

Scholarship Summary

2019-2020

\$149,040

TOTAL AWARDED

84

NUMBER OF STUDENTS

2018-2019

\$128,032

TOTAL AWARDED

88

NUMBER OF STUDENTS

2017-2018

\$113,350

TOTAL AWARDED

83

NUMBER OF STUDENTS



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A CITY

A Catholic Foundation of Oklahoma scholarship helps Daniel Trieu (right) attend Southwestern Oklahoma State University in Weatherford. Trieu is pictured with his father and Archbishop Paul Coakley.



Education and Evangelization Grants

	NUMBER OF GRANTS	TOTAL AWARDED
2019-2020	58	\$192,936
Schools	17	\$49,503
Parishes/Missions	37	\$129,929
Other	4	\$13,504
2018-2019	36	\$116,695
Schools	15	\$41,440
Parishes/Missions	20	\$72,055
Other	1	\$3,200
2017-2018	57	\$99,746
Schools	20	\$38,111
Parishes/Missions	37	\$61,635

Pastoral Music and Fine Arts Grants

	NUMBER OF GRANTS	TOTAL AWARDED
2019-2020	27	\$120,668
Schools	9 ●	\$36,011 —
Parishes/Missions	18 —	\$84,657 —
<hr/>		
2018-2019	20	\$105,668
Schools	5 ●	\$26,371 —
Parishes/Missions	14 —	\$78,962 —
Other	1	\$335
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2017-2018	27	\$85,030
Schools	8 ●	\$27,285 —
Parishes/Missions	19 —	\$57,745 —



CLE Seminar

YEAR	SPEAKERS	PROFESSION	ATTENDEES
2019-2020	Samual A. Donaldson	Professor of Law at Georgia State University	77
2018-2019	Douglas J. Stanley	A Partner at Bryan Cave Leighton Paisner in St. Louis	75
2017-2018	Cynda Ottaway & Lauren Ottaway Johnson	From Crowe & Dunlevy, P.C. in OKC	100+

Religious Educator of the Year

YEAR	HONOREE	PARISH
2019-2020	Kendra Miller	Our Lady of Sorrows, Chandler
2018-2019	Jane Nusz	St. Anthony of Padua, Okeene
2017-2018	Janis Mollman	St. Mark the Evangelist, Norman

Catholic School Educator of the Year

YEAR	HONOREE	PARISH
2019-2020	Julia Anderson-Holt	Bishop McGuinness Catholic High School
2018-2019	Nancy McCabe	St. Elizabeth Ann Seton, Edmond
2017-2018	Denis Heard	Mount St. Mary Catholic High School

Catholic Nurse of the Year

YEAR	HONOREE	PARISH
2019-2020	Patricia A. Culbert, ARNP	Saint Andrew Catholic Church, Moore
2018-2019	Laura Miller, RN	St. Joseph Catholic Church, Ada
2017-2018	Angie Tomlinson, RN	St. Philip Neri Catholic Church, Midwest City

We are living through an unprecedented moment in time.

But what gives me hope is our equally unprecedented commitment to responding to the needs of our archdiocese—our parishes, schools and agencies. The Catholic Foundation of Oklahoma has been able to help many programs and services during the pandemic. This highlights the importance of the archdiocese having a strong Catholic Foundation that stands ready to assist not only during times of certainty but during times of uncertainty.

For 56 years, the Catholic Foundation of Oklahoma has helped donors transform passion into impact on the programs and services they care about most. We are mindful that every dollar we grant represents the legacy and an investment of a donor whose intent was to strengthen a parish, a school or one of the agencies of the Archdiocese of Oklahoma City.

Every day, we see the impact of our donors' generosity and investments. The lasting, impactful change the archbishop lays out in his pastoral plan for the archdiocese in his "Vision 2030" will certainly take time. That is why the Catholic Foundation of Oklahoma invests for the long term. We can do this because of the incredible faith and foresight of our donors, who make permanent commitments to their Catholic faith. Their legacies will continue changing futures for generations to come here in our archdiocese.

With Vision 2030, Archbishop Coakley has given us a blueprint to enable us to focus our commitment to the following areas: Family, Discipleship, Education, Young People, Cultural Groups, Catholic Social Teaching and Parish Life. The Catholic Foundation of Oklahoma has made several changes that will help us align with this vision. We have welcomed a new executive director, Peter de Keratry, and we have been executing a 2030 strategic plan for the foundation.

To all our donors and agency partners who have let us share in their generosity, and on behalf of our dedicated and talented board and staff at the Catholic Foundation of Oklahoma, I offer my sincere gratitude. Thank you for inspiring us, and we invite you to join us in helping make Archbishop Coakley's Vision 2030 become the success and have the impact on the archdiocese that we all hope for.

My challenge is for all Catholics in the archdiocese to ask themselves what their Catholic legacy will be. The Catholic Foundation of Oklahoma stands ready to assist you and your family in finding the answer.

Blessings,

Daniel C. Stith, CFP
President of Catholic
Foundation of Oklahoma



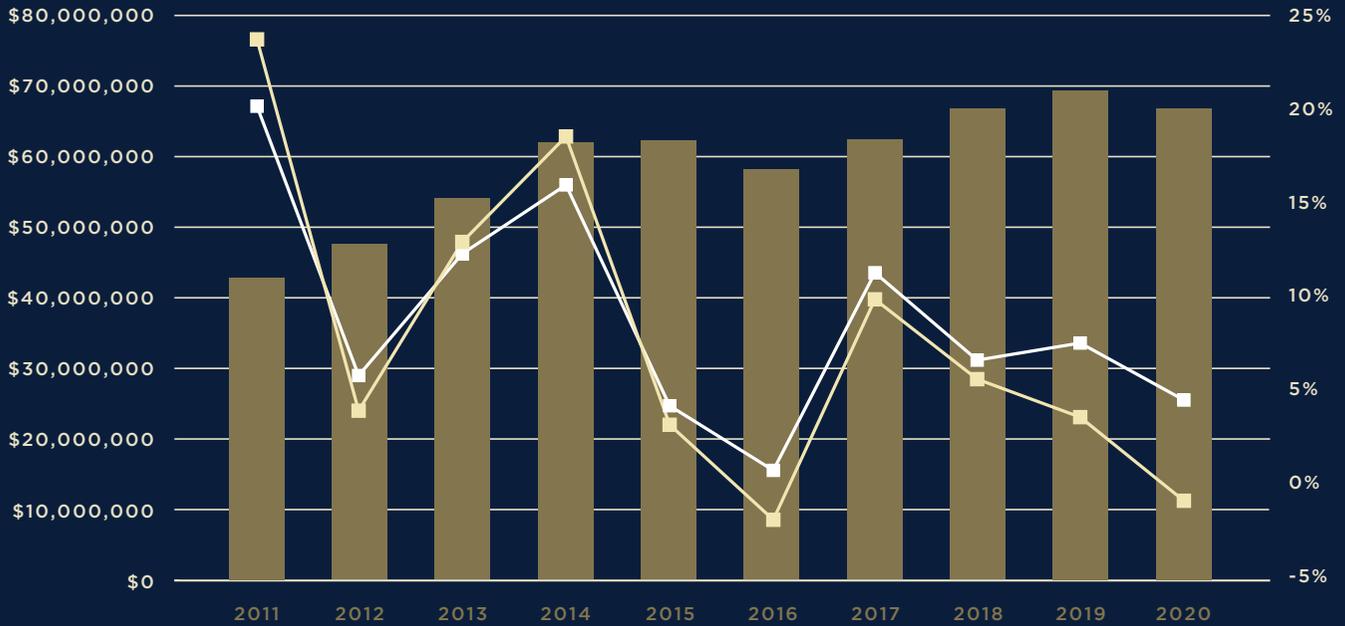
Statement of Financial Position

ASSETS	JUNE 30, 2020	JUNE 30, 2019
Cash	\$424,963	\$184,105
Accounts Receivable	\$42,871	\$191,841
Investments	\$67,119,870	\$69,058,717
Other Assets	\$415,679	\$394,857
Total Assets	\$68,003,383	\$69,829,520
LIABILITIES	JUNE 30, 2020	JUNE 30, 2019
Grants and Program Services Payables	\$40,210	\$64,367
Deferred Revenue	\$44,967	\$96,141
Annuity Contracts Payable	\$1,368,778	\$1,083,803
Charitable Funds Held for the Benefits of Other Organizations	\$49,161,287	\$52,390,794
Total Liabilities	\$50,615,242	\$53,635,105
NET ASSETS	JUNE 30, 2020	JUNE 30, 2019
Without Donor Restriction	\$8,217,530	\$8,616,658
With Donor Restrictions	\$9,170,611	\$7,577,757
Total Net Assets	\$17,388,141	\$16,194,415
Total Liabilities and Net Assets	\$68,003,383	\$69,829,520

Statement of Activities

REVENUES AND SUPPORT	JUNE 30, 2020	JUNE 30, 2019
Contributions	\$2,646,458	\$472,363
Investment Return (Net)	(\$249,109)	\$506,174
Administrative Fees and Other Income	\$142,150	\$134,000
Royalties	\$186,294	\$208,731
Other	\$91,099	\$69,250
Total Revenue and Support	\$2,816,892	\$1,390,518
EXPENSES AND DISTRIBUTIONS	JUNE 30, 2020	JUNE 30, 2019
Expenses and Distributions	\$111,045	\$291,679
Grants and Program Services	\$1,122,693	\$331,090
General and Admin	\$385,809	\$299,962
Development	\$3,619	-
Total Expenses and Distributions	\$1,623,166	\$922,731
CHANGE IN NET ASSETS	JUNE 30, 2020	JUNE 30, 2019
Change in Net Assets	\$1,193,726	\$467,787
Net Assets at Beginning of Year	\$16,194,415	\$15,726,628
Net Assets at End of Year	\$17,388,141	\$16,194,415

Investment Growth



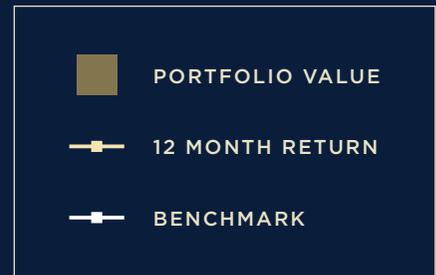
10 YEAR RATE OF RETURN AVERAGE

7.82%

CFO

8.86%

BENCHMARK

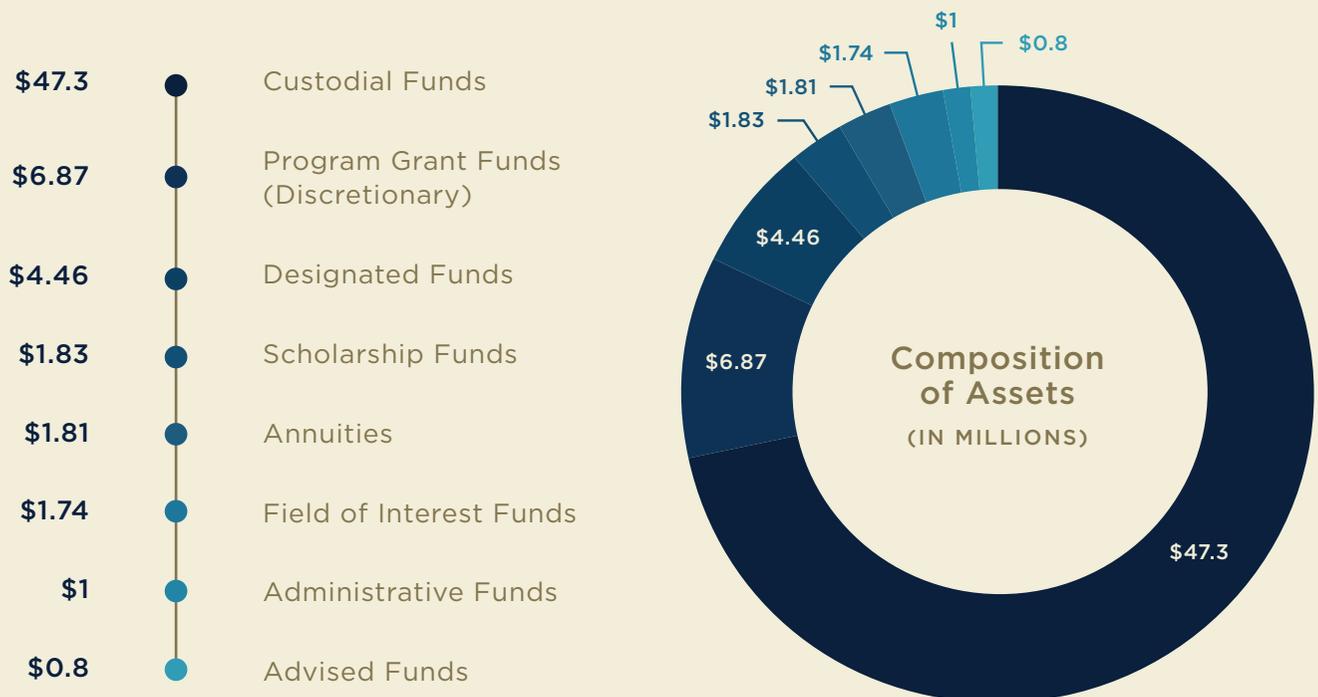


10 YEAR OVERALL GROWTH

\$23,964,335

Fiscal Year 2020 Investment Performance

	06/30/2020	CALENDAR YR	3 YEARS	5 YEARS
EQUITY ORIENTED				
Catholic Foundation of Oklahoma	17.9%	-3%	2.7%	3.1%
MSCI World Index	19.4%	2.8%	6.7%	6.9%
INCOME ORIENTED				
Catholic Foundation of Oklahoma	4.7%	3%	3%	3%
BloomBarc U.S. Aggregate Bon Index	2.9%	8.7%	5.3%	4.3%
INFLATION ORIENTED				
Catholic Foundation of Oklahoma	5.9%	-3.2%	4.4%	5.9%
TOTAL RETURN				
Catholic Foundation of Oklahoma	11.6%	-0.8%	2.9%	3.3%
60% MSCI/35% Bloomberg Barclays Bond/5% Real Assets Custom	13.2%	4.5%	6.2%	6.1%





Fund Types

The Catholic Foundation of Oklahoma seeks to inspire generosity to support parishes and other ministries of the Church. Benefactors may contribute to or establish the following types of funds:

CFO Ministry Fund

The general philanthropic fund of the foundation providing annual grants to parishes, schools, and other ministries throughout the archdiocese.

Donor Advised Fund

Provides flexibility for charitable giving with significant tax advantages and limited administrative oversight.

Designated Endowment Fund

Focused giving to a specific parish, school, or ministry (i.e. St. Mary School).

Field of Interest Endowment Fund

Giving to a specific need (i.e. youth ministry initiatives) with the Catholic Foundation administering distribution of funds to address the need.

Custodial Fund

Funds managed by the foundation in support of a parish, school or affiliated organization with assets and distributions returned to the fund owner.

Ways to Give

Qualified Charitable Distribution (QCD)

If you are age 70 1/2 or older and own an IRA, you may use a portion of it to give to the Catholic Foundation of Oklahoma or to your church, school or favorite ministry by using a Qualified Charitable Distribution. A QCD is a direct transfer of funds from your IRA to a qualified charitable organization. U.S. tax law requires that beginning at age 72, owners of IRAs must make annual required minimum distributions from their accounts. Using a QCD while doing this benefits your charity and it benefits YOU because the amount given does not count as taxable income.

Donor Advised Funds

A Donor Advised Fund at the Catholic Foundation of Oklahoma is your personal charitable giving account. Donor Advised Funds allow you to direct where and how often you want to give. After opening your Donor Advised Fund, you simply contact the Catholic Foundation of Oklahoma to make distributions from the fund. You can support your parish and other ministries you care about. The Catholic Foundation of Oklahoma manages the investment, administrative, audit and distribution process. A Donor Advised Fund at the Catholic Foundation of Oklahoma is a great option for those who want the flexibility to give to various ministries over time.

Why Open a Donor Advised Fund with the Catholic Foundation of Oklahoma?

- If distributions meet Catholic Foundation of Oklahoma guidelines, funds may be distributed as you wish.
- You can make additional contributions to your Donor Advised Fund as frequently as you'd like.
- Any contribution you make to your Donor Advised Fund will receive the maximum tax deduction allowed by the IRS.
- Donor Advised Funds at the Catholic Foundation of Oklahoma are invested to maximize the impact of your giving.
- The Catholic Foundation of Oklahoma team can help you identify ministries that align with your personal values and giving goals.
- You can give to other ministries and organizations you care about.



Gifts in Wills

You can support The Catholic Foundation of Oklahoma through a gift in your will. The language can be quite simple.

For example:

“I give (amount/percentage/item/asset) to The Catholic Foundation of Oklahoma EIN#73-0773715 for the use and benefit of the general charitable, religious and educational purposes of the Foundation.”

Catholic Foundation of Oklahoma
7501 Northwest Expy
Oklahoma City, OK 73132
Phone: 405-721-4115

In addition, language similar to the following may be added:

“This bequest is to be used to create a new permanent endowment to benefit (parish, school, other ministry).”

“This bequest is to be added to the (Fund Name) at the Catholic Foundation of Oklahoma.”

More information about gifts in wills can be found at **cfook.org**.

For additional help, call Owen Canfield, associate director of gift planning, at 405-721-4115, or email him at ocanfield@cfook.org.

Get in Touch

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**Catholic
Foundation**
OF OKLAHOMA

2020
ANNUAL REPORT

