



INTERNATIONAL CATHOLIC STEWARDSHIP COUNCIL

## ICSC Forum for Catholic Foundations

Gaylord Opryland Hotel, Nashville, Tennessee  
October 27-28, 2018



MISSIONARY DISCIPLES:  
*Stewards of the Gospel*

The Ascension of Christ, Garofalo, oil on panel, 1510, Rome, Italy

26300 Ford Road #317, Dearborn Heights, MI 48127 | P. 800.352.3452 | F. 313.446.8316  
[www.catholicstewardship.com](http://www.catholicstewardship.com)

# AGENDA

**Saturday, October 27, 2018**

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**1:00 pm – 1:45 pm**

**Pre-conference Registration**

*Lincoln A, Presidential Mezzanine (Level M)*

**1:45 pm – 2:00 pm**

**Opening Prayer/Welcome Remarks**

*Lincoln A*

Patrick Grace, Executive Director  
Catholic Community Foundation  
Cleveland, Ohio

Lesle Knop, CFRE, Executive Director  
Catholic Foundation of Northeast Kansas  
Archdiocese of Kansas City, Kansas

**2:00 pm – 3:45 pm**

**Session 1 – Foundation Lifecycles Panel**

**New (1 to 4 years), Intermediate (5 to 10 years)  
and Advanced (10+ years)**

**Moderator:** Josh Diedrich, Executive Director  
Catholic Foundation

Diocese of Green Bay, Wisconsin

**Intermediate** – Amy Ponson, Executive Director  
Catholic Foundation

Diocese of Houma-Thibodaux, Louisiana

**Advanced** – Cory Howat, Executive Director  
Catholic Foundation

Archdiocese of New Orleans, Louisiana

**3:45 pm – 4:05 pm**

**Break Sponsored by #iGiveCatholic**

Josephine Everly and Cory Howat

**4:05 pm – 6:00 pm**

**Session 2 – Legacy Giving Seminars**

Scott Hartman, Vice President of Development  
Catholic Foundation of Ohio, Columbus, Ohio

Carolina Scipioni, Planned Giving and Endowment  
Program Manager, Catholic Community Foundation  
of Santa Clara County, California

**6:15 pm**

**Dinner, Patio of the Fuse Bar, Gaylord Hotel**

**Sponsored by**

**Christian Brothers Investment Services (CBIS)**

Sean McCaffrey

**Fund Evaluation Group, LLC**

Matt Finke

**Sunday, October 28, 2018**

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**7:00 am**

**Mass**

*Presidential Boardroom A*

Presider – Monsignor Jacques Plante  
Pastor, St. Aidan and St. Patrick Parishes  
Cumberland, Rhode Island

**7:30 am – 8:30 am**

**Continental Breakfast**

*Lincoln A*

**Sponsored by Asset Strategy Consultants**

David E. Saunders, II

**8:30 am – 9:45 am**

**Session 3 – Benchmarks for Catholic  
Foundations: Structural and Operational**

Jim Kelley, Director of Development  
Diocese of Charlotte, North Carolina

Andrea Krupp, Esq., Executive Director  
Catholic Foundation of Rhode Island

Joe Langenderfer, CFRE, CEO  
Catholic Education Foundation  
Crest Hill, Illinois

**9:45 am – 10:05 am**

**Break Sponsored by Greater Mission**

Thomas Sonni, Tony Gwiazdowski, and  
Donna Marino

**10:05 am – 12:00 pm**

**Roundtable Discussions on the following topics  
of attendees choosing:**

- Board Engagement
- Hiring and Training/Educating Staff
- Crisis Messaging for Donors
- Donor Advised Funds
- Charitable Gift Annuities
- Professional Advisory Councils

Attendees will have an opportunity to periodically rotate to a different discussion group during the roundtable discussions. Each table will have an assigned facilitator.

# THANK YOU TO OUR SPONSORS



## Asset Strategy Consultants

ASC is an independent, investment consulting firm focused on endowments, foundations, retirement plans, and operating reserves portfolios. With five offices along the East Coast, our goal is to provide best-in-class service, and to utilize technology to maximize the benefit and value of our consulting services on \$9.5 billion assets under management. Our 27-year history enables us to offer a more diverse suite of deliverables, and to better negotiate with the providers that deliver services to our clients. From our consultants and analysts to our business development and client support teams, ASC maintains an array of clients and long-term relationships.



## Christian Brothers Investment Services (CBIS)

Christian Brothers Investment Services, Inc. (CBIS) is a specialist investment manager in Catholic responsible investing. CBIS works exclusively with Catholic institutions and their fiduciaries offering a broad spectrum of investment strategies in equities and fixed income. CBIS is the investment firm of choice for numerous dioceses, foundations, colleges and universities, religious institutes and health care systems. Our primary objective is to deliver highly competitive risk adjusted returns in a manner consistent with the ethical and social teachings of the Catholic Church. We currently manage over \$6 billion in assets globally and have offices in the U.S. and Europe.



## Fund Evaluation Group, LLC

Fund Evaluation Group, LLC (FEG) provides investment consulting, portfolio management, and research services to predominantly institutional clients. Established in 1988, the independently-owned firm has approximately \$50 billion in total client assets under advisement.<sup>1</sup> FEG specializes in designing sophisticated, institutional portfolios. Services include investment policy development, portfolio design, asset allocation, manager due diligence, research and education. <sup>1</sup> For full disclosures, visit: [www.feg.com/disclosures](http://www.feg.com/disclosures).



## Greater Mission

*Greater Mission* is focused entirely on helping the Catholic Church fulfill its sacred mission of bringing the world to Jesus Christ. *Greater Mission* has provided strategic development services specifically to Arch/Diocesan Catholic Foundations in Baltimore, Orlando, Cleveland, Richmond, Lansing, Palm Beach and Steubenville. Our executive team understands how to build these foundations from the inside out, having also led them as Arch/Diocesan staff in Providence, Baltimore, Venice, and St. Petersburg for more than 50 years collectively! *Greater Mission* has become one of the nation's top leaders in conducting large-scale capital campaigns, often building major endowments and bridging to ongoing legacy gift initiatives. Our approach is deeply mission-driven and our success has been truly extraordinary. The work we do leading up to and following these campaigns also distinguishes *Greater Mission* as being truly dedicated to the service of the Church's mission in both the near and the long term.



## #iGiveCatholic

#iGiveCatholic is a bishop-led, nonprofit organization developed in partnership with lay leaders in Catholic philanthropy. Its mission is to promote Catholic philanthropy that builds the capacity of Catholic ministries and invites donors into the joy of charitable giving. #iGiveCatholic provides an online giving platform that gathers the Catholic community to give thanks and give back during a 24-hour online giving day and provides resources and trainings in fund development best practices. Our nation's first-ever Catholic giving day, #iGiveCatholic has raised \$6.76 million for parishes, schools, and nonprofit ministries in just three years. The giving day inspires faithful stewards to "give Catholic" on #GivingTuesday, a global day of giving. Declared "the most successful Catholic crowdfunding event to date" by the National Catholic Register, the #iGiveCatholic event was created in 2015 by The Catholic Foundation of the Archdiocese of New Orleans. In 2018, 28 arch/dioceses will participate.



The International Catholic Stewardship Council (ICSC) is a professional organization recognized internationally as a source of education, networking and information to advance the ministry of Christian stewardship as a way of life in the Roman Catholic Church, and to promote the cause of Catholic philanthropy in dioceses and parishes worldwide.

ICSC is the only organization dedicated exclusively to advancing Christian stewardship, Catholic philanthropy and resource development in North America as well as overseas. Founded in 1962, ICSC has over 1,200 members representing over 800 dioceses and archdioceses, parish communities, Catholic organizations and professional firms internationally.

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