



IMPACT REPORT

JULY 1, 2023 - JUNE 30, 2024



CATHOLIC COMMUNITY FOUNDATION
ARCHDIOCESE OF BALTIMORE

Share Your Blessings. Sustain Our Faith.



“I pray not only for them, but also for those who will believe in me through their word, so that they may all be one, as you, Father, are in me and I in you...”

— John 17:20-21

Dear Friends,

In the Gospel of John, Jesus prayed that his followers would be one as he is one with the heavenly Father. Moreover, the Holy Spirit has been poured out upon us together as one in the Church, the Body of Christ, so that together we might bear credible witness to Christ before the Lord and advance the Church’s mission of evangelization and service.

I am truly heartened to see this spirit of unity in action through the remarkable work of the Catholic Community Foundation and the unwavering support of our fund holders and donors. Despite the many, diversified interests of our generous contributors—some focus on beloved parishes or schools, others on cherished programs of charitable outreach, and still others assist our Clergy and Seminarians along their priestly and discernment journeys—the Foundation is a catalyst for effective collaboration. Together, we uplift our local Church, cultivating a rich legacy of faith for future generations to enhance and extend.

Through generosity of donors like you, the Catholic Community Foundation, by supporting and sustaining the Church’s mission, extends the love of the Risen Lord to many. Our parishes and schools are becoming more resilient, our charitable outreach is growing, and innovative ministries that illuminate the Light of Christ are flourishing, thanks in large part to those of you receiving this report.

Finally, let me extend my heartfelt gratitude to Foundation President John Balch and the dedicated members of the Foundation’s Board of Trustees and Committees for their steadfast leadership over this last year. Many thanks as well to each and every one of you who have generously offered your time, talents, and resources in support of our shared mission.

With grateful prayers for the continued safety and well-being of you and your loved ones, I am

Faithfully in Christ,

Most Reverend William E. Lori
Archbishop of Baltimore
Chairman, Catholic Community Foundation

IMPACT IS MORE THAN A MEASURE OF WHAT WE ACHIEVE; IT'S THE EMBODIMENT OF OUR SHARED MISSION TO SERVE AND STRENGTHEN OUR CATHOLIC COMMUNITY. IT IS THE FRUIT OF FAITHFUL STEWARDSHIP, THE LEGACY OF GENEROSITY, AND THE CONTINUED BLESSING OF HOPE FOR FUTURE GENERATIONS.

The Catholic Community Foundation is honored to share, in each of our Impact Reports, stories that illustrate how fund holders and donors are transforming lives and preserving faith.

This year, you will read about: a family establishing an endowment to honor their single parent; another continuing their ancestors' dedication and connection to a beloved parish and school; and a couple fostering vocations and seminarian discernment so that our faith can be sustained for future generations. We'll also check in with the Apostleship of the Sea ministry and an endowment assisting its efforts in a year most significant for this arm of maritime outreach.

These stories represent just a fraction of the impact made possible by the Foundation, and so you will also see just a small sampling of the beneficial impacts that grant distributions have made this year, distributions that touch a wide range of ministries and institutions across our Archdiocese and beyond.

From educational support to parish life, and from social services to spiritual formation, each endowment and grant distribution has the power to uphold and nurture our family of faith in lasting and profound ways.



HONORING A SINGLE PARENT'S STRENGTH AND SACRIFICES

The Regina Cecilia Jenkins Memorial Endowment Fund

When those who knew her speak of Regina "Jean" Jenkins, their voice invariably begins to quiver from the raw emotion the story this remarkable woman's life evokes.

David Jenkins, her son, spoke to us at length about Jean, her incredible life, and his family endowment fund that her life inspired. This fund is honoring her dedication and hard work by providing single-parent children in the Archdiocese of Baltimore with financial assistance to attend an archdiocesan Catholic school.

Jean Jenkins was no stranger to adversity. Growing up in a working-class family that fell on tough times, she shouldered the responsibility of supporting her family when her parents became ill. Her brother later went to live with relatives in Texas, leaving Jean to navigate life's challenges on her own. "Despite her brilliance," David said, "circumstances forced her to prioritize survival over personal aspirations."

Her resilience deepened as she became a single mother in the late 1970s. "She worked tirelessly to ensure we had the opportunities she lacked," David said. "From taking odd jobs to pursuing her college degree in her forties at Morgan State University—where she often brought me to class—Jean epitomized determination."

A devout believer in Catholic education, Jean worked three jobs to send David to Catholic schools, knowing they would instill in him a foundation of faith, discipline, and service. Her sacrifices were not made in vain. "I excelled," David said, "and I developed a strong work ethic, inspired by my mother's example." He worked after school to help with family finances and became deeply connected to his Catholic community.

When Jean passed away last June, David and his wife, Michelle, knew they had to honor her legacy. "We wanted to establish an endowed fund with the Catholic Community Foundation," David said, "to help children of single-parent homes like mine."

With a fervent desire to extend his mother's spirit of selflessness and perseverance to others, David and Michelle worked with the Foundation to establish *The Regina Cecilia Jenkins Memorial Endowment Fund*. They found the process seamless and easy. "Terry [Brashears, Assistant Director for the Foundation] walked us through everything. The Foundation established the fund within two weeks of our alerting them to our decision."

The Regina Cecilia Jenkins Memorial Endowment Fund will mean the world of difference to single-parent households in our community.

"While all Catholic school families make great sacrifices," Dr. Donna Hargens, Superintendent of Catholic Schools for the Archdiocese, said, "single parents can face unique challenges. Endowment funds like this provide them and their children access to a 21st century education that can break barriers. Endowments like *The Regina Cecilia Jenkins Memorial Endowment Fund* offer not only financial support, but also hope—helping to build futures grounded in faith, perseverance, and the promise of opportunity."

The Regina Cecilia Jenkins Memorial Endowment Fund stands as a tribute to Jean Jenkins's unwavering faith, grit, and love, encouraging a cycle of giving.

"Mom changed the trajectory of our family tree," David reflected, a message he was able to share with Jean prior to her passing, "and we felt an urge to help uplift other families similarly in her honor."



Regina "Jean" Jenkins

Photo courtesy of the Jenkins Family



CELEBRATING FAMILIAL BONDS TO A BELOVED PARISH AND SCHOOL

The Sparr Family Endowment for Catholic Education Fund

The legacy of the Sparr family is woven deeply into the fabric of St. Stephen Parish and School in Kingsville, where generations have been baptized, married, and educated. Now, through the newly established Sparr Family Endowment for Catholic Education Fund, this legacy will continue to make a difference in the lives of students at St. Stephen School for years to come.



Karen Arnold (formerly Sparr), baptized at St. Stephen, had always felt connected to the school and parish, even after relocating from the area. Both her parents attended the elementary school, and Karen’s mother was a member of one of the last graduating classes of St. Stephen High School.



Karen and her husband, Lee, further strengthened this family history to Catholic education when they began raising their own children. “I wanted our children to have the same opportunity for a Catholic education that I did,” Karen said. “The values and moral foundation it provides are so important, and Catholic schools help instill these in a way that secular schools cannot.”



The idea for the fund emerged after the passing of Karen’s father, Philip Terrence “Terry,” in 2022. His strong connection to St. Stephen, along with his and his wife’s shared belief in the power of Catholic education, inspired Karen and her daughter, Jacqueline, to establish the endowment in his honor. The fund provides tuition assistance grants to students at St. Stephen, helping families who may otherwise face financial barriers to a Catholic education.



Karen and Lee had been quietly supporting Catholic causes for years, but their philanthropy had always been a private matter. It was only recently that they shared their story with others, recognizing that this new fund could make a broader impact.

Photos this page courtesy of St. Stephen School

Jacqueline “Jackie” Guice, Karen’s daughter, has also long been a strong proponent of Catholic education. Her experiences at Mount de Sales Academy, where theology studies were both deep and thought-provoking, shaped her view on the importance of faith and education. “Seeking truth through prayer is a lifelong process,” Jackie said. “That’s what Catholic education taught me, and it’s what I want for other children.”

For the Sparr family, this endowment is a way to ensure that the values of Catholic education—centered on Christ, grounded in a strong moral code, and reinforced with theological understanding—continue to thrive. As Karen explains, “Catholic schools today seem to have a sturdier underpinning in the faith. They are dynamic and theological, not just ‘rote’ as it had been in the past. It’s the best of both worlds.”

“We deeply appreciate that St. Stephen has meant so much to the Sparr family that they have committed to seeing it continue to thrive for future generations of students,” Marianne Kozlowski, Principal of St. Stephen School, said. “Our Catholic community is very fortunate that so many, like the Sparrs, are profoundly engaged. Their generosity ensures that students of today and tomorrow will benefit from the strong faith-based education our school offers, and reflects the commitment of Catholics in the Archdiocese of Baltimore to nurture and sustain our beloved schools and values.”

YEAR-IN-REVIEW

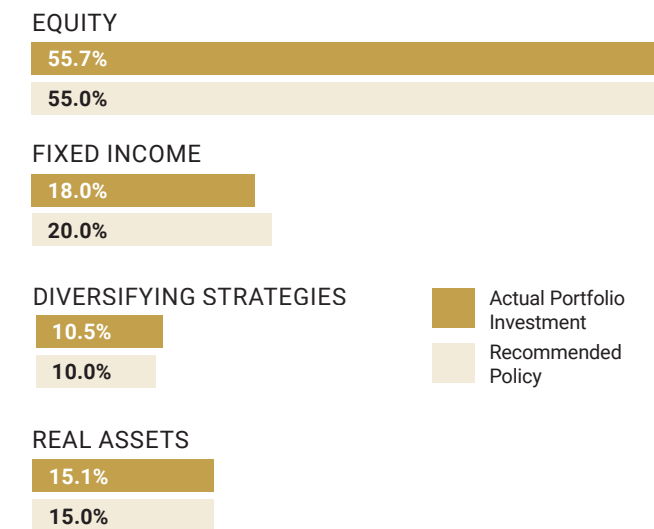
Over fiscal year 2024, the Catholic Community Foundation’s portfolio increased from \$112.4 to nearly \$115.9 million. Importantly, with 8 new funds established, this brought the Foundation’s total amount of endowment funds to 541, and donor-advised funds to 10.

Equity markets experienced a continuation of strong performance from 2023, which led to new highs in major domestic indices and strong returns globally. From an economic perspective, real GDP came in below expectations in the first quarter of 2024. Inflation has moderated but remains above the Federal Reserve’s preferred two-percent level, which has justified keeping interest rates at current levels. Domestic growth was supported by consumer spending, which slowed marginally at the beginning of the year, having been above trend for an extended period. Employment has remained relatively healthy according to the monthly Bureau of Labor Statistics data.

Ultimately, however, the Catholic Community Foundation’s endowment underperformed its policy benchmark by 0.7%. This was largely due to private equity and venture capital investments, which are valued on a one-quarter lag and have trailed the strong public equity markets. While these investments tend to be volatile within shorter time horizons, they have been the primary source of the Foundation’s outperformance over the long term. Diversifying and inflation-hedging investments such as hedge funds, private natural resources, and real estate, contributed positively to the Foundation’s relative performance during fiscal year 2024.

If you have any questions on any of the information presented in this section, please contact Daniel Bowles, Assistant Controller for the Foundation, at Daniel.Bowles@archbalt.org.

INVESTMENT REVIEW ASSET ALLOCATION DETAIL



ENDOWMENT MARKET VALUES

Annual 2021-2024

Jun 2024	\$	115,861,352
Jun 2023	\$	112,418,318
Jun 2022	\$	110,721,175
Jun 2021	\$	112,898,643



GRANT DISTRIBUTIONS

The Catholic Community Foundation is pleased to report that more than \$5 million in grant distributions were made in FY24. Below is just a small sample of how these distributions from Foundation endowments are strengthening our Catholic community.

Archbishop Curley High School's distribution is helping to cover the costs of general school needs, so these costs are not added to the school's tuition and, thus, not passed on to its school families.

Bishop Walsh High School is utilizing a distribution for tuition assistance grants, expanding access to this excellent school for families who, otherwise, could not consider it.

Funds distributed to **Catholic Community of South Baltimore** are helping the parish augment opportunities for evangelization through gatherings at its retreat house, pilgrimage walks, Christmas caroling events, and other occasions designed to enfold families more deeply into parish life.

Church of the Nativity's distribution is making it possible for the parish to purchase new equipment that will improve the broadcast quality of its live-streamed Masses.

Divine Mercy Parish used a distribution for multiple outreach initiatives: to help supply local food pantries; to support Archway Station in aiding children and young adults with disabilities; to strengthen local care centers for seniors; and to assist expectant mothers through 1st Way Pregnancy Center.

John Carroll School in Bel Air is setting a Christ-centered example for its students by providing outreach to St. Rose of Lima School in Haiti with a distribution, while a second distribution is helping underwrite a scholarship awarded to an incoming student with the best application essay.

Monsignor Slade Catholic School used a distribution to build a more secure vestibule.

A **Notre Dame Preparatory School** distribution is empowering the school to offer emergency assistance to families facing acute financial hardship.

A distribution to **Our Lady of the Mountains** enabled the parish to offset expenses of a new sound system for its choir loft.

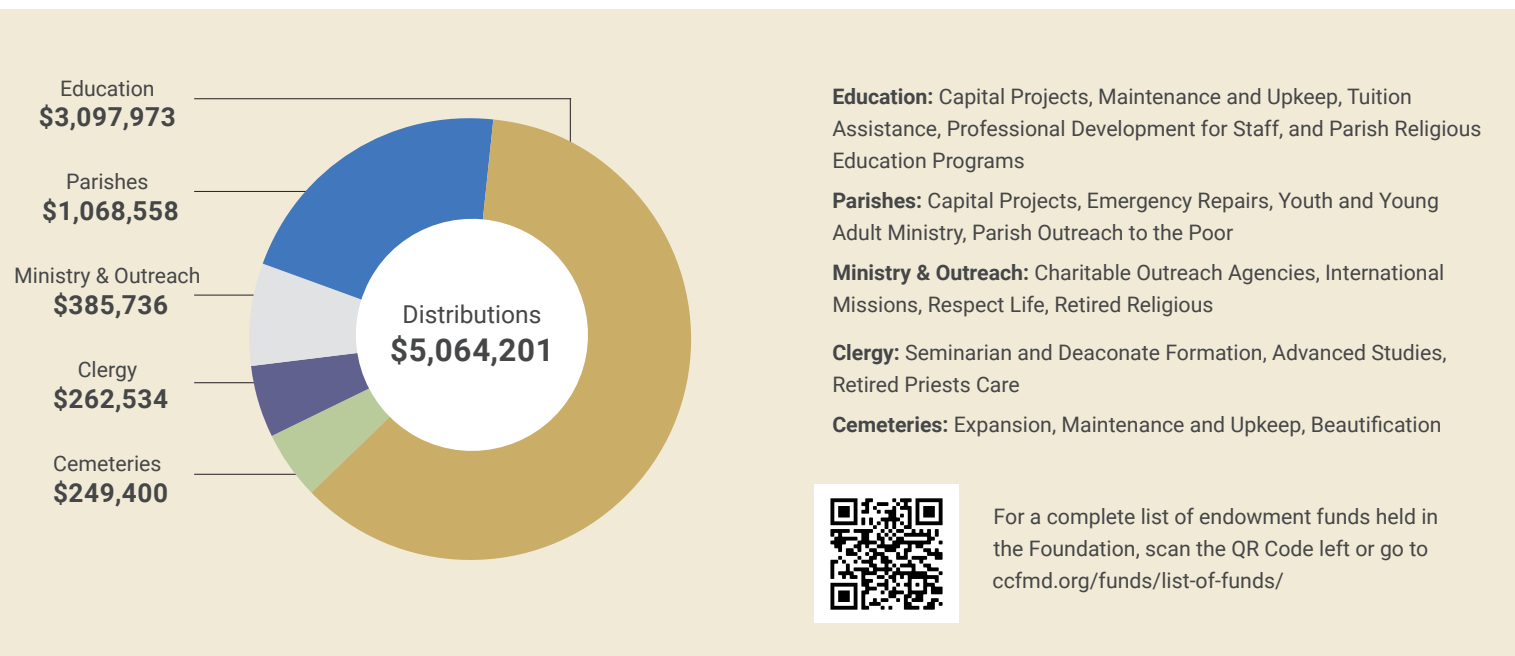
Children in the Catonsville community are benefitting from a distribution to **St. Agnes**, which the parish is using to support its popular summer camp program.

Teachers and staff at **St. Mary's Schools** in Annapolis are benefitting from advanced coursework and training that a Catholic Community Foundation distribution is funding.

St. Vincent de Paul's distribution is strengthening its 22 programs of outreach, while Catholic Charities' **Our Daily Bread Employment Center** is using a distribution at its discretion, where it identifies the greatest need.

More than **15 archdiocesan parishes** are using distributions they received to maintain and beautify their memorial gardens.

If your organization has benefitted from a distribution from a Foundation endowment, we invite you to email us at CatholicCommunityFoundation@Archbalt.org, so that we may share the good news with others and help increase the Foundation's potential for good.



For a complete list of endowment funds held in the Foundation, scan the QR Code left or go to ccfmd.org/funds/list-of-funds/



NEW FUNDS

In addition to the wide array of beneficiaries aided in ministry by Foundation distributions in FY24, more good news came in the form of eight new funds established by families and organizations with an interest in ensuring a thriving future for the funds' beneficiaries.



St. Mary's High School

The Neighbors in Need Endowment Fund

Established by Mr. Stephen Kowalski: provides financial support for the St. Teresa of Calcutta Conference of the Society of St. Vincent de Paul

The Sparr Family Endowment for Catholic Education Fund (see page 4 of this report)

Established by Karen Sparr Arnold and Jaqueline Guice: provides tuition assistance for students attending St. Stephen Catholic School, Bradshaw

Our Lady of Sorrows Cemetery Endowment Fund

Established by Our Lady of Sorrows parish for the care and maintenance of the parish cemetery

St. Mary's Schools in Annapolis established these five new funds to enhance the schools and expand access to them through scholarships:

- **The Carmine Blades Basketball and Scholarship Endowment Fund**

Provides financial support for the Girls Basketball program including, but not restricted to, scholarships for basketball players

- **The Dr. Ingrid Merkle Fund**

Provides support for the distinctive academic programs at St. Mary's High School—The Honors Societies, The Parvis Scholar Program, The St. Isidor Cyber Program, The Charles Carroll Scholars Program, The Fine Arts Program, and The Environmental Studies Program

- **The James D. Oldson Diversity Scholarship Fund**

Provides 4-year scholarships for students who demonstrate a need for tuition assistance to attend St. Mary's High School; intended for, but not limited to, students from diverse backgrounds

- **The Robert B. Smith II Scholarship in Honor of Coach Brad Best and The Ruane Family Scholarship Endowment Funds**

Provide scholarships to 8th graders registered at St. Mary's High School



SELECTED FINANCIAL INFORMATION

Statements of Financial Position as of June 30, 2024 and 2023

ASSETS	2024	2023
Cash	\$ 7,370,804	\$ 666,630
Investments	115,861,352	112,418,318
Split interest agreements and other assets	589,463	626,106
Agency funds held for others	2,140,768	2,017,965
Contributions receivable, net	-	-
Total assets	\$ 125,962,387	\$ 115,729,019
LIABILITIES AND NET ASSETS		
Liabilities		
Accrued grant liabilities	\$ 4,972,025	\$ 4,515,942
Accrued expenses	272,598	243,999
Agency funds held for others	2,140,768	2,017,965
Total liabilities	\$ 7,385,391	\$ 6,777,906
Net assets		
Without donor restrictions	\$ 12,677,609	\$ 11,224,208
With donor restrictions	105,899,387	97,726,905
Total net assets	\$ 118,576,996	\$ 108,951,113
Total liabilities and net assets	\$ 125,962,387	\$ 115,729,019

Statements of Activities and Changes in Net Assets Year Ended June 30, 2024 and 2023

REVENUE, GAINS AND OTHER SUPPORT	2024	2023
Contributions	\$ 4,059,512	\$ 2,066,871
Other income (Loss)	(62,816)	12,355
Investment earnings, net	11,799,106	7,065,598
Total revenue, gains and other support	\$ 15,795,802	\$ 9,144,824
EXPENSES		
Management fees	\$ 977,271	\$ 1,201,274
Grant expense	5,192,648	4,214,712
Total grants and expenses	\$ 6,169,919	\$ 5,415,986
Changes in net assets	\$ 9,625,883	\$ 3,728,838
NET ASSETS		
Beginning of year	\$ 108,951,113	\$ 105,222,275
End of year	\$ 118,576,996	\$ 108,951,113





SUPPORTING SEMINARIAN FORMATION AND ADVANCED STUDIES FOR PRIESTS

The Smith and Wendelken Family Endowment Fund

Joe and Kathy Smith were at a turning point in their philanthropy, a time for reflection, not only on their personal faith but also on the future of the Church. From a practical perspective, they recognized a need that struck at the heart of their family’s faith journey—they needed priests to administer the sacraments now, and their children and grandchildren would need them in the future too.



Photo courtesy of Joe and Kathy Smith

With a growing awareness of the challenges facing the priesthood, the Smiths set out to make a meaningful difference. “We were re-evaluating our charitable giving,” Kathy explained. “And from a selfish standpoint, we saw that priests were essential for our lives—and would be for generations to come.”

Kathy’s background as an executive at a non-profit organization provided increased insight. She understood the critical importance of financial support for seminarians and priests. To that end, the Smiths established *The Smith and Wendelken Family Endowment Fund* in the Catholic Community Foundation, a fund designed to support both seminarians and priests in need of financial assistance for their education and continued formation.

“There was no grand inspiration from any one priest,” Joe said. “It wasn’t about any individual. It was about being intentional with our giving and making a difference for the Church’s future.”

The process of establishing the fund was surprisingly simple. Joe and Kathy met with Jim Edwards, then-Director of the Foundation, and within two weeks, the fund was set up. “It was very easy,” Joe said. “We were signing the agreement in no time.”

The Smith and Wendelken Family Endowment Fund provides vital resources not only for seminarians just beginning their priestly journeys, but also for priests already in ministry seeking advanced studies. “We wanted all priests and seminarians to benefit from our fund,” Kathy added. “It was about strengthening the Church today and into the future.”

Father Steven Roth, Director of Vocations for the Archdiocese, underscored the profoundly beneficial impact such endowments have on the Church. “By lessening financial burdens on our seminarians and priests,” he said, “endowments like *The Smith and Wendelken Family Endowment Fund* help ensure that the Church continues to thrive with an ever-rich pipeline of strong, dedicated leaders.”

For anyone considering making a similar commitment, Joe offers a simple piece of advice: “To borrow the Nike line, ‘JUST DO IT’...but also, pray about the decision. Can you commit to establishing a fund and to continuing to support it?”

Their decision to establish *The Smith and Wendelken Family Endowment Fund* took on even more significance later when Joe and Kathy learned that three of their grandsons—brothers—were all in the process of discerning calls to the priesthood, a revelation that further reinforced their decision.

As they reflected further, the Smiths were quick to acknowledge that the decision to establish the fund was clearly God’s plan. “Ultimately, it wasn’t our idea,” Kathy said. “It was His.”



ASSISTING SEAFARERS FAR FROM HOME

The Monsignor FitzGerald Fund for the Apostleship of the Sea

In 2013, Reverend Monsignor John FitzGerald took a visionary step that would create a lasting impact on the Apostleship of the Sea (AOS) ministry in the Archdiocese of Baltimore. A devoted Navy Chaplain for nearly 30 years, who retired with a rank of Captain, Monsignor FitzGerald understood the unique challenges faced by seafarers— isolated from their families, often in need of spiritual care, and navigating difficult lives on the high seas.



Monsignor John FitzGerald

His deep commitment to this ministry led him to establish *The Monsignor FitzGerald Fund for the Apostleship of the Sea*, a lasting revenue stream to support AOS’s vital work, within the Catholic Community Foundation.

As Monsignor FitzGerald’s fund has grown over the years, it now provides distributions that directly benefit the seafarers AOS serves. “Monsignor FitzGerald was the right person at the right time for this job,” Andy Middleton, Director for the AOS said. “He was a wonderful fundraiser and a people person, and, importantly, someone who genuinely cared about seafarers and understood the necessity of creating long-term financial stability for this ministry that aids them.”

The Monsignor FitzGerald Fund for the Apostleship of the Sea, built up over the past decade, serves as an auxiliary fundraising source for AOS, sources that also include donations from loyal donors, suggested contributions from participating ships, and annual fundraising events.

This year, distributions from the endowment played a key role in AOS’s response following the collapse of the Francis Scott Key Bridge, offsetting the expense of SIM cards for the stranded *Dali* crew, so they could stay connected with their families at home. Distributions also helped pay for a day of sightseeing

for crew members in Washington, DC, offering them some much-needed respite. “These are the kinds of moments we want to create—where seafarers remember that, in their time of need, the Archdiocese of Baltimore saw, appreciated, and cared for them. They come away thinking of the Port of Baltimore, as ministered to by the Apostleship of the Sea, as a safe haven,” Middleton said.

Looking to the future, Middleton has ambitious goals for Monsignor FitzGerald’s fund. “We will use distributions to help seafarers stay connected to their faith,” he says. “Whether providing Catholic reading materials, prayer cards, or supporting outreach efforts to non-Catholic seafarers, we’re looking to evangelize the Catholic faith in a way that speaks to their hearts.”

“*The Monsignor FitzGerald Fund for the Apostleship of the Sea* is a perfect example of the Catholic Community Foundation working as intended,” Kim Montgomery, Executive Director for the Foundation, said. “Monsignor FitzGerald’s desire to create lasting revenue for the Apostleship of the Sea has come to fruition. The AOS and seafarers across the globe are benefitting from his acute foresight of many years ago.”

Through *The Monsignor FitzGerald Fund for the Apostleship of the Sea*, Monsignor FitzGerald’s legacy of compassion for the world’s seafarers and their families, will long endure.



Andy Middleton



THE LEGACY LEAGUE

Sustaining our Catholic Mission for generations to come

The Legacy League is an integral component of the Catholic Community Foundation, recognizing individuals who have ensured that their commitment to parishes, schools, and cherished ministries of the Archdiocese of Baltimore will continue well into the future, by including these entities in their estate plans and/or by establishing an endowed fund with the Foundation.

Legacy League members have made a profound impact on our Catholic community and are helping to forge a future where the Church and its ministries will flourish for generations to come. In this way, they bring ongoing blessings to our family of faith, reaffirm their commitment to God's work on earth, and leave a pathway for their descendants to stay connected to the ministries and institutions they value.

If you have planned a gift (or gifts) in support of the Archdiocese, a parish, school, favorite ministry, or other Catholic institution, please reach out to us at 410-547-5461 or online at CatholicCommunityFoundation@archbalt.org. We would be pleased to forward you a Legacy League Member Profile to complete, so that we may facilitate your welcome.



To learn more about the Legacy League and to view our roster of Legacy League members please scan the QR code left, or visit us at ccfmd.org/catholic-funds/legacy-league/

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