

# FEBRUARY UPDATE

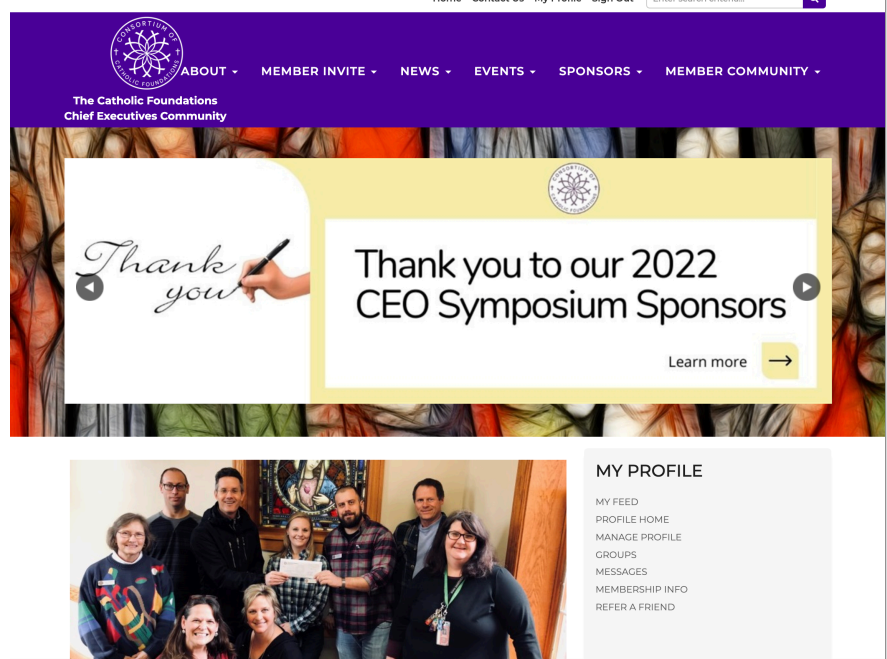
*Actively-curated Content | Best Practice peer Exchange | Chief Executive Community-building*



## Steering Committee Latest News

**Please join us,** Catholic Foundation chief executives from across the U.S. this Spring, May 3-4-5 2022 in Sioux Falls, SD to celebrate the *tenth annual, CEO Symposium* gathering for best practice learning, leadership exchanges and overall enjoyable peer community-building!

- Ten topics of member-driven content will focus timely and relevant peer discussions!
- Seven new Sponsors with particularly expertise in investing, technology and marketing will inspire you!
- Go to our new website and **register to join us. The link is on page 2 of this newsletter!**



## Welcome to the Consortium's new Digital Community!

Friday 14 January 2022 was an exciting day, it was LAUNCH DAY of the Consortium's new public website <https://www.consortiumofcatholicfoundations.org> and members-only portal! Founding Members received in the morning a welcome email blast with the site URL, their log-in information, and temporary password to access their new peer-to-peer chief executive member community. Within the first hour following receipt of announcement, founding members began posting messages in their site feeds of excitement and gratitude to each other for being part of the



## Welcome Founding Member

Michael Shade

CEO & President

Catholic Community Foundation of  
Northeast Indiana, Fort Wayne, IN

"I think the Consortium is a wonderful, more formalized way to connect with community Foundations that are Catholic. Loren Brown invited me to attend the 2019 CEO Symposium in Atlanta and it was great!

Over the next couple of years I hope the Consortium experience increases my ability to learn what others have successfully done leading their Foundations. I am particularly interested in learning more about Catholic Foundation awareness-building and branding, board governance and growth as an independent Foundation, and continuing to enhance our outreach and engagement when discussing estate planning."

creation of the new tech platform, and delight with their branded mousepad gift to celebrate the launch! Early favorite features are 24/7/365 access to members' profiles and Directory, 1 to 1 private messaging, Member Community Forums for Q & A's, as well as the new Community File Library, filled with valuable, current content and documentation used to lead and manage Catholic Foundations!

*Thank you, Consortium 2022 Sponsors of our 10th Anniversary CEO Symposium!*

We are thrilled to welcome several new partners of great expertise and value to our members to our Consortium community! Both Presenting and Patron Sponsors will be providing remarks at our 3-4-5 May 2022 CEO Symposium in Sioux Falls, SD. Registration is now open for members and prospective members/guests! **See our website to register!**

**<https://consortiumofcatholicfoundations.org/event/202210thanniversaryceosymposium>**





**Sneak-peek at the 2022 CEO Symposium Agenda!**

***THEME: Though Many, We are the Body of Christ!***

**Member-led Discussions:**

- Marketing & Communications that Truly Inspire
- Pastors & Priests as Active Foundation Partners
- Scaling-up Priorities at Different Organizational Life-stages
- Utilizing Your Board's Governance leadership at each Foundation Life Stage
- Measuring the Success of your Donor Development Program's "Seed-planting"
- Keeping your Tech Capabilities Current & Protected
- The Future of our North American Multi-Cultural Church & Implications for Catholic Foundations

**Sponsor-led remarks:**

- Our Unique Path of Consulting & Appeals for Growth & Mission Reach
- Trends in Re-imagining the Growth of Donor and Mission Impact
- Engaging Faith Leaders, Congregations and the Community to Maximize the Impact of your Foundation
- Private Markets: Aligning Financial Objectives with Catholic Values
- Using Advanced Technology for Sustainable Fundraising
- A Catholic Foundation Growth Journey
- The Future of Catholic Responsible Investing

**We invite you to join your peer Catholic Foundation chief executives in  
Sioux Falls, SD May 3-4-5, 2022!**

*See the Consortium's new website to register!*

## 2022 Consortium & CEO Symposium Sponsors



### Presenting Sponsors



Clearstead is an institutional investment consulting and private wealth management firm. We are relentless in providing financial solutions so clients can exceed their aspirations and build legacies for their families, organizations, communities and themselves.

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We combine the fresh thinking of an investment boutique with the deep knowledge and vast resources of Morgan Stanley to deliver customized, innovative solutions designed to meet the complex needs of our Catholic Foundation clients.



Mercer is committed to helping Catholic organizations make the world a better place today — and for years to come. With more than two decades of experience serving faith-based institutions and more than 40 Catholic client relationships, we're equipped to advise you on strategies uniquely tailored for endowments and foundations, as well as defined contribution and defined benefit plans (including church plans). From risk monitoring to operational support, and investment advisory to fully delegated solutions, we offer a full suite of services specifically tailored and customized to faith-based organizations.



Stellar is the leading provider of philanthropic fiduciary enterprise solutions and professional services. Stellar's iPhi™ software solutions power some of the most well-respected Community Foundations, Religious Philanthropies and Commercially-sponsored, Donor-advised Fund (DAF), Planned Giving, and Endowment Programs in the nation.

## Patron Sponsors



The Catholic Foundation of Greater Philadelphia (CFGP) is an independent, nonprofit community foundation committed to growing philanthropy according to the teachings of Jesus Christ.



Foundant Technologies has worked to help maximize the impact of the philanthropic community through technology solutions since 2007. Through a company-wide dedication to honest, lasting relationships and an obsession with client service, the Foundant Team strives to ensure success for its grantmaker, grantseeker, and community foundation clients, above all else.



We are a team of technology and nonprofit consultants with extensive experience working with nonprofits for over a decade. Our goal is to provide our clients with an intuitive and easy-to-use online donation platform that serves to increase nonprofit financial health and sustainability.

## Friends Of The Consortium Sponsors

We are **Cornerstone**, one of the nation's leading independent investment consulting firms. We are committed to building and preserving the assets of institutions and wealthy families, now and into the future.