

SEPTEMBER UPDATE

Actively-curated Content | Peer Exchange | Chief Executive Learning & Community-building



Tech Partner YourMembership.com

With the resources of our YM implementation specialist, a "small tech workgroup," our admins, and the support services of instructional videos and literature, *we are deep in training*, learning how to set up and operate the future Consortium tech platform! A public website will also be designed, a member portal provided, your library of curated materials, are just some of the new features. Still on track for Beta testing & year-end launch - monthly member updates will be provided.

2022 CEO Symposium Planning Underway!

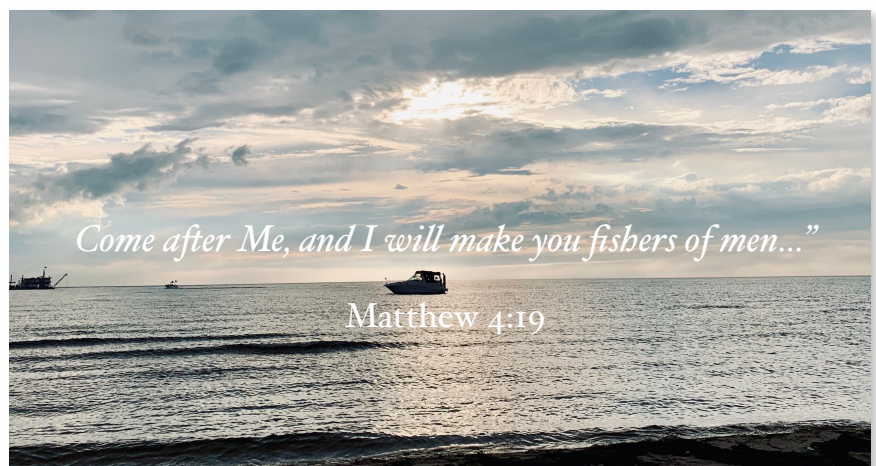
This month's steering committee meeting is being held in Denver to begin to plan the 3-4-5 May 2022 CEO Symposium! If you have a topic you would like to see featured, and/or would like to present a topic/ facilitate a peer discussion, please contact Colleen by 9/17 - we would very much like to hear from you!

What's NEW *this Month?*

The Consortium's Steering Committee met on Tuesday 31 August to primarily discuss the new YourMembership.com tech platform configuration, and learned more about the administrator training experiences currently underway for the next 12 weeks; all in an effort to "ready" the system for Member usage by the end of the calendar year.

A three-year, pro forma forecast has been approved by the Consortium's steering committee. As a planning tool, this financial statement will help provide line-of-sight to a member growth outlook, identify any risks of starting up, and provide a pathway to financial stability and sustainability during the Consortium pilot. Our appreciation to Sean Finigan of the Catholic Community Foundation in San Jose, CA for sharing his financial planning expertise!

The "Development Phase" for this first year of the Consortium, and its "introductory" member fee has been met with great



NEW FOUNDING MEMBER



WELCOME,

Patricia DiSandro!



Meet **Patty DiSandro**, Executive Director for the **Catholic Foundation, Diocese of St. Augustine**, Florida.

<https://cf.dosafl.com/>

Patty was given added responsibilities two years ago to manage their Foundation, begun in 1987, while serving as the Diocese's Associate Director of Development & Stewardship! Recently, Patty was recently invited to focus *full-time on leading the Foundation!* **Congratulations, Patty, wonderful!**

- "A question we often ask is, 'What are our peers doing?' I joined, hopeful the Consortium will be an important resource in strategically moving our foundation forward to better serve..."
- "Leading our Foundation is an honor...God doesn't always call the equipped, but he does equip the called!"

Consortium Pilot: Development Phase

support from new Founding Members. See the list of [the latest Founding Members](#) at the time of our publishing on page 3!

Chief Executive
Conversation Corner



Sharing highlights of recent email peer exchanges on a pertinent topic

One of the many benefits that Consortium members enjoy is being able to "Ask Your Peer Chief Executive" a timely question regarding a pertinent strategic question. Lifting up what's on your mind to peers across the country results in receiving a collection of responses, (often with many examples) to help accelerate a response to the member question! Just this past month, several "*Chief Executive Conversation Corner*" summaries were published for members reflecting current activities on topics, such as: cryptocurrency, alternative investments, the latest cloud-based software, the connection of the Foundation with the Diocese, and more. Once the new tech platform is operating, these Q & A's will be so easy to do, virtually accessible, and the digital member library will archive all information shared for future reference! *Really exciting!*

We remain humbled and thrilled with the growth of the Consortium of Catholic Foundations community! We will be accepting new members throughout our introductory year, fiscal year 30 June 2022. We are very grateful for the 30 who have joined as *Founding Members*, and made an additional contributions beyond dues to help support the Consortium's development and start-up expenses. *How generous is that?!*

If you would like to receive additional information about joining this new peer chief executive Catholic Foundation community, **please contact Colleen Mitchell**, member services steward at colleend.mitchell@gmail.com or call 617-224-8400.

*May God continue to bless you and your leadership of your Catholic Foundation! **Enjoy the last few days of summer!***

Welcome new August *Founding Members* of the Consortium of Catholic Foundations!

Michele Brock	Executive Director	Catholic Foundation in the Archdiocese of Dubuque
Alison Cochrane	CEO & President	The Catholic Community Foundation for the Roman Catholic Church of the Archdiocese of San Antonio
Josh Diedrich	Executive Director	Catholic Foundation for the Diocese of Green Bay, Inc.
Sarah O. Hanley	President and CEO	The Catholic Foundation of Greater Philadelphia
Monica Herman	Executive Director	Catholic Foundation of Southern Minnesota
Lisa Louis	Executive Director	Catholic Foundation of Northwest Pennsylvania
Mary "Sue" McEntee	Executive Director	Catholic Foundation of Southwest Iowa
Manuel "Manny" Rubio	CEO	Catholic Community Foundation of San Diego
Ron Schatz	Interim Executive Director	Catholic Foundation of Western North Dakota
Michael W. Shade	CEO	Catholic Community Foundation of Northeast Indiana
Kristin M. Smith	Executive Director	Catholic Community Foundation of Mid-Michigan
Sister Mary Tracy, SNJM	Executive Director	The Catholic Foundation of Eastern Washington
Pete Waldron	President	Catholic Foundation of Eastern Pennsylvania
Scott Whitaker	Executive Director	Catholic Foundation, Diocese of Austin