



For it is **in GIVING** that we **RECEIVE**
~ St. Francis of Assisi

2022 Annual Report

Giving Today to Serve Christ Tomorrow



CATHOLIC
FOUNDATION
FOR NORTHWEST INDIANA

Serving Future Generations

“The Church will be here until the end of time; so, we better make sure we have financial resources available for all times, too.”

-the late Bishop Dale J. Melczek



*Judy Holicky,
Stewardship Coordinator*

We mourn the loss of founder and long-time shepherd, Bishop Dale. J. Melczek, on August 25, 2022. He shared the vision of the diocesan finance committee and demonstrated his commitment in action as well as words, establishing the Catholic Foundation in 2008. He initiated and funded endowments for Bishop Noll, Andrean, and Marquette Catholic high schools, as well as a fund for education initiatives in the Diocese of Fort-Liberte' in Haiti.

The Catholic Foundation for Northwest Indiana has been truly blessed to thrive under the leadership of Bishop Melczek, Bishop Donald J. Hying, and Bishop Robert J. McClory, as well as the many dedicated volunteers and board members over the past 13 years.

Thanks to each of you for your prayers and support, past, present, and future!

2022 Board of Directors

Most Reverend Robert J. McClory,
Chairperson

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Reverend Benjamin Ross

Mike Welsh



November 3, 2022

"I give thanks to my God always whenever I think of you and when I think of you, I pray with joy in my every prayer for you." Phil 1: 3-4

Dear Sisters and Brothers in Christ,

St. Paul's letter to the Philippians reminds us to be grateful for God's great love, his many generous gifts, and for the gift of one another.

As we live in the reality of the presence of Christ in our lives, we are more fully able to live lives that the Lord intends us to have. We know God is always with us. We keep in mind that the most important appointment we have in the course of the day is to spend time with God.

I sincerely thank each of you for your prayerful support of the Catholic Foundation for Northwest Indiana: donors, endowment holders, board and committee members and numerous volunteers, including the late Bishop Dale J. Melczek, founder of our Foundation (see pages 8 and 9 for a tribute to his leadership and vision). Taking time in silence and in prayer, we can experience God's work in our lives and it attunes us more fully to what he has called us to do.

I encourage each of you to pray for the grace to understand how God is working in your life, *"Jesus, help me to understand how I can serve you better."* Through the Foundation, we serve God by sharing his love and mercy with others. Your gifts and support of the Catholic Foundation for Northwest Indiana impact thousands every year.

I thank God for each of you with the great joy that comes from witnessing God's goodness in the Diocese of Gary. I thank you for sharing God's gifts to support the future of the many ministries funded by the Catholic Foundation.



*Most Reverend Robert J. McClory
Bishop of Gary*

Gratefully yours in Christ,

Most Reverend Robert J. McClory
Bishop
Diocese of Gary

2022 Mercy Fund Grant Recipients

The Mercy Fund is one of the 45 distinct endowment funds managed by the Catholic Foundation for Northwest Indiana. It is the only grant-making fund in the Foundation. Every year the Mercy Fund Grant Committee encourages all Catholic agencies and parishes in Northwest Indiana to submit a grant proposal for a new and innovative mission which serves their community.

Each must reflect the corporal and spiritual acts of Mercy as listed in the Gospel of Matthew. Pope Francis, in 2016, added an eighth work, “care for our common home.” As a spiritual work, we are to gratefully contemplate God’s world. As a corporal work, we are to perform daily gestures that help to build a better world.



WalkingWithMoms.com

is a national effort sponsored by the U.S. Catholic Bishops through which Catholic parishes and communities “walk in the shoes” of local pregnant and parenting women in need. It’s about 1) Assistance, helping to connect moms with information and resources to help them meet the many needs that they have in this time of their lives. They also provide 2) Accompaniment, “walking with her” and her family during this most critical part of her life.

<https://www.prolifegary.org/about-3>

Centers of Hope

is a ministry of the Franciscan Health Emergency Rooms across Northwest Indiana that specifically serves those who are survivors of sexual abuse. The hospitals provide Sexual Assault Nurse Examiners (SANE) so that survivors are treated with compassionate care and dignity. Survivors arrive at the Emergency Room in physical and emotional trauma and nothing but the clothes on their backs, which are often taken as evidence. This ministry provides them with personal items, new clothing, undergarments, and other necessities.



*"Amen, I say to you, whatever you did for one of these least brothers of mine, you did for me."
(Mt. 25:40)*



Joining Hands with Phil's Friends

is a mission of the children at St. John the Evangelist School (SJE) who got involved with Phil's Friends Cancer Center in Crown Point through a fellow SJE student Blake Boswell, who is battling B-cell lymphoblastic leukemia lymphoma. This ministry touches the hearts of all the students, parents, teachers, and parishioners at St. John, connecting with many families who are served by the Cancer Center with care packages, Cards of Hope, telephone calls and other forms of volunteering.

Labors of Love Ministry at St Michael's

is all about comforting those in need. Hand-crocheted and knitted items: blankets, scarves, loveys, and rosaries are made with love and provide emotional support to victims of trafficking, residents of nursing homes, shelters for the homeless, the Women's Care Center and other ministries where help is greatly needed within our Gary diocese. These anonymous angels provide their time and talents, also donating materials. This grant will help them to provide more materials so they can continue to serve as needs grow.



Active Endowment Funds

For more information, contact the Foundation Development office at 219-769-9292 x 268.

Anne Verbeke Lay Ecclesial Ministry Endowment

Provides scholarships to students enrolled in the Diocese of Gary Lay Ecclesial Ministry program who have financial need.

Beverly Hutton Endowment Fund for St. Paul's School

Was established as a memorial to Mrs. Hutton who was a longtime volunteer; enhances curriculum and technology to support STEM/STREAM programs.

Bishop Carl Mengeling Nativity School Endowment

Supports the work of Nativity of Our Savior School in Portage.

Bishop Dale J. Melczek Fund for Andean High School

Provides scholarship support to Gary Diocese Catholic students in need attending Andean High School.

Bishop Dale J. Melczek Fund for Bishop Noll Institute

Provides scholarship support to Gary Diocese Catholic students in need attending Bishop Noll Institute.

Bishop Dale J. Melczek Fund for Marquette High School

Provides scholarship support to Gary Diocese Catholic students in need attending Marquette High School.

Bishop Grutka Scholarship Fund for North American College: Rome

Supports the education and formation of Diocese of Gary seminarians attending North American College.

Camp Lawrence Endowment

Supports Camp Lawrence's operational expenses and capital improvements.

Cathedral of the Holy Angels Endowment

Supports the Cathedral's operational needs and capital expense.

Catherine Mary Huerta Catholic Education Endowment

Provides financial assistance for children who desire to enter or continue kindergarten at Aquinas School.

Catholic Charities Diocese of Gary Endowment

Supports the general services and needs of Catholic Charities.

Catholic Foundation Operating Endowment

Supports the general operations of the Catholic Foundation for Northwest Indiana.

Class of 1969 Scholarship

Provides scholarship support to students at Andean High School; was funded by Andean alumni, Class of 1969.

Diocese of Fort-Liberté, Haiti

Supports educational efforts in our Sister Diocese of Fort-Liberte' in Haiti, the poorest diocese in Haiti.

Diocese of Gary Scholarship for Andean High School

Supports Gary Diocesan Catholic students in need attending Andean High School.

Diocese of Gary Scholarship for Bishop Noll Institute

Supports Gary Diocesan Catholic students in need attending Bishop Noll Institute.

Diocese of Gary Priests' Retirement Endowment

Provides supplemental support to the priests' retirement plan.

Diocese of Gary Seminarian Fund

Supports the education and formation of Diocese of Gary seminarians.

Dyer Catholic Education & Formation Endowment

Promotes Catholic education and formation in the Dyer community.

Gary Diocesan Cemeteries Endowment Care Fund

Provides support to meet the long-term needs of the Gary Diocesan Cemeteries.

Helen Pukoszek Scout Educational Scholarship Endowment

Provides scholarships for two boys (one high school, one college) currently registered in Troop 542.

Holy Name Society Scholarship

Supports an annual college scholarship awarded to a graduating high school senior from Sacred Heart Parish in LaPorte.



James & Barbara Thorstad Scholarship

To provide tuition assistance for a student at St. Patrick School, Chesterton.

Joseph Hagenow/Justin Tylka Memorial Scholarship Endowment

Supports an annual college scholarship awarded to a Catholic Communities' high school senior.

Luke DeBold Memorial Scholarship

Provides scholarship support to students at Andrean High School; was funded by classmates, teammates, and alumni in memory of Luke, who lost his battle with cancer in 2010.

Marquette High School Scholarship Fund

Provides scholarship assistance to Marquette High School students.

Mercy Fund Endowment *(see more details pp.4-5)*

Was established in 2016 to support projects engaged in acts of mercy throughout the Diocese of Gary. Annual grant cycle runs April 1 to August 1; grants are awarded in November.

Nativity of Our Savior Church Endowment

Provides for the care and maintenance of the church buildings.

Our Lady of Czestochowa Endowment Fund

Dedicated to preserving the Shrine and Grounds of the Salvatorian Fathers and Brothers in Merrillville. Masses are said daily in English and Polish.

Sacred Heart Whiting Fund Endowment

To maintain operations and improvements of Sacred Heart Church and to support ministry programs in the parish.

St. Casimir School Endowment Fund

To provide tuition assistance and scholarships for students at St. Casimir School and cover school-related expenses.

St. Mary Crown Point Altar and Rosary Society Endowment

Supports the charitable works of the Altar and Rosary Society of St. Mary's Church, Crown Point.

St. Mary Griffith Church Endowment

This endowment supports the operating needs of this parish community.

St. Matthias Parish Endowment

Supports the facilities and ministries of St. Matthias Church.

St. Matthias Religious Education Endowment

Supports St. Matthias' faith formation program.

St. Michael the Archangel Cemetery Endowment

Provides for the care and maintenance of the parish cemetery.

St. Patrick School Fund, Chesterton

To support any Catholic education purpose at St. Patrick School.

St. Paul School Endowment

To promote Catholic education and formation, ministry, religious education and adult formation.

St. Stanislaus Kostka Parish Endowment

Support the care, maintenance and renovation of St. Stanislaus Kostka Parish building.

St. Stanislaus Kostka School Endowment

Supports the St. Stanislaus Kostka School in Michigan City.

St. Teresa of Avila College Scholarship Endowment

Provides one scholarship each to a sophomore, junior and senior attending Valparaiso University, and one to a graduating high school senior registered at St. Teresa and attending college at VU or elsewhere.

St. Thomas More School Endowment

Supports the St. Thomas More parish school in Munster.

St. Thomas More-Andrean Scholarship Endowment

Provides a St. Thomas More student with a scholarship to Andrean High School.

St. Vincent de Paul Society Endowment

Supports charitable services and activities of the Catholic Communities' St. Vincent de Paul Society in Wanatah.

Staley Scholarship Andrean High School

Provides scholarship assistance to students of Andrean High School.

A Tribute to Bishop Melczek

Excerpts used with permission. Go to <https://catholicmagazines.org/northwest-indiana-catholic> for complete coverage. Authored by Anthony D. Alonzo.

Foundation Ensures Future Support



Bishop Dale J. Melczek maintained an active ministry in the diocese for 30 years as a spiritual leader. In fiduciary matters, he promoted efforts to improve diocesan financial management controls, and he established a non-profit foundation to responsibly manage endowed funds that will continue to benefit the faithful into the future.

According to retired area banking professional and lawyer Cal Bellamy, Bishop Melczek quickly identified the need for the diocese to have long-term plans and accountability. He said the third Bishop of Gary “displayed the highest standards” with “attention to detail” and desired to ensure the Church would continue to have resources to evangelize, educate and offer charity.

“As (Bishop Melczek) would say, ‘The Church will be here until the end of time; so, we better make sure we have financial resources available for all times too,’” said Bellamy, who advised the diocesan finance council. “The (Catholic) Foundation for Northwest Indiana provides a means to ensure ongoing support even beyond our lifetime. Contributions remain in the fund with

“Bishop Melczek’s love for the Haitian people and his concern was evident. He understood the financial need as well as the spiritual needs of the diocese of Fort-Liberté.

In 2013, he established an endowment fund with the Catholic Foundation for Northwest Indiana and continued to fund it through his lifetime.

The Fort-Liberté endowment will continue to provide financial support for Fort-Liberté in perpetuity.”

-Judy Holicky, Catholic Foundation for Northwest Indiana

earnings paid out for the donor’s designated purpose.”

In 2014, Bishop Melczek made personal contributions to the Foundation totaling \$100,000 toward endowments. Those have yielded funds supporting several scholarships for students at Andrean High School, Bishop Noll Institute, Marquette Catholic High School and educational initiatives in the Diocese of Fort-Liberte’ in Haiti.

Bishop Melczek reiterated his wholehearted support of Catholic education. “I think there’s nothing better that we can do for our young people than to provide them with a good, strong, faith life... because it affects their all-around future.

“I’m a firm believer of the benefits of Catholic education at all levels and, very particularly, I am partial to the high school level,” Bishop Melczek said. The Catholic Foundation he founded and personally supported will continue to provide financial assistance to many Catholic organizations forever.

A Charitable, Spiritual Connection



Both immensely grateful and profoundly sad, Deacon Mikinson Henry, a native of Haiti, recently remembered the man he “looks up to like a dad” and someone who made a positive difference for people near and far.

“Bishop Melczek is a true disciple of Christ; he has touched so many lives, even beyond the U.S.”

Since 2008, the Diocese of Gary has had a spiritual and charitable relationship with the Diocese of Fort-Liberté in Haiti. Established by Bishop Dale J. Melczek, diocesan parishes have provided material resources and prayer support to the poorest diocese in the poorest country in the Western Hemisphere.

Deacon Henry is a witness of Bishop Melczek’s take-it-to-the-people charitable efforts and also someone who understands the challenges on the ground in Haiti. The deacon’s countrymen have endured a depressed economy, natural disasters and what he called a corrupt “dictatorship” of a government.

Accompanying a group of diocesan deacons to Haiti in 2014 and assisting with translations, Henry said he was impressed at the leadership of the third Bishop of Gary in his former homeland.

“Bishop Dale understood the Haitian people. He understood the culture, too,” Deacon Henry said. “He said, ‘We are not going there to dictate what the people need, but to see how we can help them - not tell them what to do.’”



He credits the eagerness of Bishop Melczek, who sought to make a difference in the lives of everyone he met.

“(Bishop Melczek) treated people with dignity and respect,” Deacon Henry said. “He was always happy to see the people of God.”

Mission trips to Haiti were transformative for the deacon contingent, including Deacon Stephen Grandfield. Bishop Melczek asked Grandfield to join the group traveling to Haiti in 2014, just one year after the bishop had ordained him to the permanent diaconate. The two would later work together at St. Mary of the Lake in Miller until the bishop’s passing.

“Soon after we arrived, an insurrection developed, resulting in street riots, Molotov cocktails and tire burnings,” recalled Deacon Grandfield. The group found themselves needing to take shelter while rioters and government forces battled it out in the streets.

Calling him a mentor, Deacon Grandfield said the bishop’s closeness to the Lord and fearlessness helped those encountering this unexpected scenario.

“We were together for three days. We talked a lot. Deacon Grandfield continued. “His spirituality was real and intimate. You know how Jesus would always say, ‘Do not be afraid’ — trust me, Bishop Melczek was not afraid.”



Ways to Give



Your Catholic faith is central to your life. You care deeply about the work of the Church within the Diocese of Gary. Pair your faith with your passion through a gift that will last forever. There are many ways to create a legacy of faith through the Catholic Foundation for Northwest Indiana.

Cash

Cash is one of the easiest ways to make a charitable contribution. A cash contribution can be a check, money order or cashier's check. Donors whose gifts are matched by a company will receive credit for the matching amount. You can either establish an endowment fund or give to an existing fund.

Securities

Gifts of securities are accepted by the Catholic Foundation. The securities may be given so that the donor receives a tax deduction equal to the fair market value of the donated assets while avoiding capital gains tax on the donated assets. The Catholic Foundation will work with you to facilitate the donation of both marketable and closely held securities.

IRA Charitable Distribution

Using a Qualified Charitable Distribution (QCD) is a tax-savvy strategy that allows you to transfer up to \$100,000 per year from your IRA directly to a qualified charity, such as the Catholic Foundation. It is only available to IRAs and individuals who have reached a Required Minimum Distribution (RMD) age. Any amount processed as a QCD counts toward your RMD requirement and reduces the taxable amount of your IRA distribution. This lowers both your adjusted gross income and taxable income, resulting in a lower overall tax liability. Check issued by Custodian must be payable to charity.

Memorial Gifts

Making a donation in memory of someone special reflects your desire to make a lasting impact on the lives of others, just as your honoree has done. You may also include the desire for memorial gifts to be made in your name as part of your final plans. Whether to establish a named endowed fund or encourage others to make individual gifts to an existing fund in your memory or that of special someone, contributions will make a difference for the Catholic cause closest to your or your loved one's heart.

Bequest

A bequest in your will is one of the simplest ways to make a charitable gift. You can specify an amount or percentage from your estate naming the Catholic Foundation to permanently benefit your designated parish, school, or other Diocesan entity or ministry forever.

Sample bequest language:

I give, devise, and bequeath to The Catholic Foundation for Northwest Indiana, the sum of \$_____ (or percentage or a description of the specific asset), for the benefit of The Catholic Foundation for Northwest Indiana and its general purposes.

Or

I give, devise, and bequeath to The Catholic Foundation for Northwest Indiana, the sum of \$_____ (or percentage or a description of the specific asset), for the creation of a permanent endowment fund for the benefit of NAME OF PARISH, SCHOOL, OR MINISTRY to be administered by The Catholic Foundation for Northwest Indiana.

Life Insurance

Life insurance is an easy way to make a significant contribution. You may give a policy that is no longer needed, take out a new policy, or name the Catholic Foundation as a beneficiary of an existing policy. Direct the proceeds, cash value of policy, or any portion of it to benefit your designated parish, school, or other Diocesan entity or ministry.

Retirement Accounts

The Catholic Foundation may be designated as the beneficiary under a donor's qualified retirement plan benefits, including IRAs, 401(k)s, 403(b)s, and Keogh (HR-10) plans. Retirement benefits may be the most tax-efficient way to make a gift to the Foundation.



Financial Summary

July 1, 2021 - June 30, 2022

After experiencing strong portfolio growth in 2021, the portfolio of stock, bond and real estate investments gave back a portion of that performance in the fiscal year ended June 30, 2022. Geopolitical headwinds, inflation, and higher interest rates have obliged the capital market to adjust to new economic realities. As we are monitoring current economic events, we continue to weather the storm, maintain a longer-term investment perspective, and believe this is the best method to grow wealth over time.

There are currently 2 parishes that are in the process of creating endowment funds with the Catholic Foundation from their diocesan savings accounts. We encourage all parishes, schools, and parish organizations to utilize endowment investing as a tool for securing a perpetual stream of revenue for their organization.

The Catholic Foundation has over \$12,800,000 with 45 endowment accounts. The portfolio is invested with consideration to Catholic moral teachings according to the guidelines of the USCCB.

Bi-annual distributions totaled \$218,673 for the fiscal year with many fund holders deciding to reinvest to increase their individual portfolios.

Annual audited financial statements for our fiscal year ended June 30, 2022 and prior are available for review at the Foundation office.

Giving Today to Serve Christ Tomorrow



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Thanks to 2022 Friends of the Foundation

Friends of the Foundation are a group of local businesses, working with the Foundation to empower Catholic individuals and families, just like you, to express their faith through giving.



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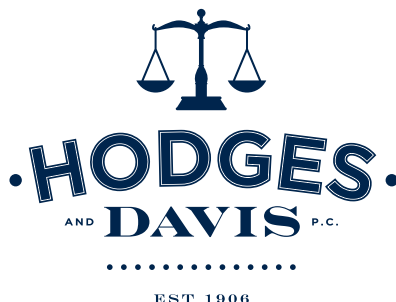


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