

Welcome to
*The impact of Catholic women's
Philanthropy; myth or reality?*

A National Catholic Community Foundation Webinar

Our webinar will begin shortly.

Welcome to our webinar!

The impact of Catholic women's philanthropy; myth or reality?



Valerie Mullen Pletcher

Senior Director of Philanthropy,
FOCUS – Fellowship of Catholic
University Students and NCCF Trustee



**National Catholic
Community Foundation**

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through philanthropy"*

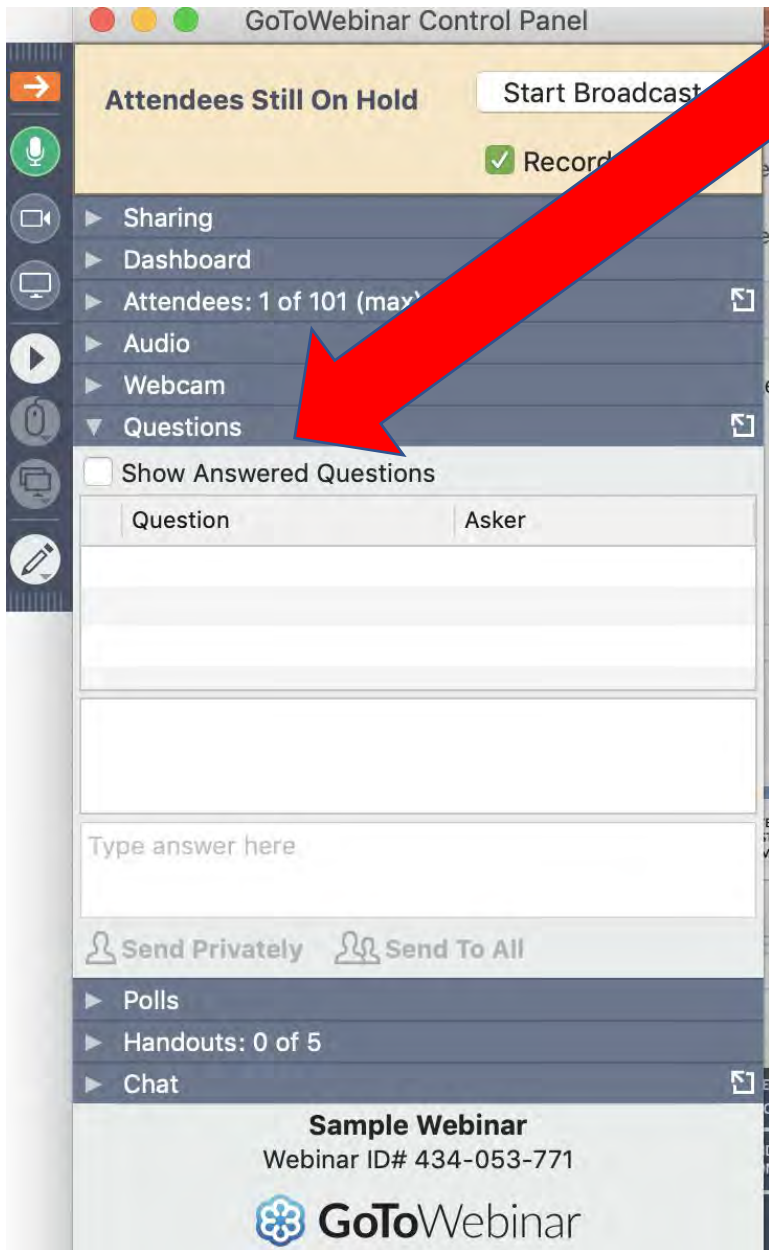
Renee Fusick

Director, National Catholic Community
Foundation



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Housekeeping



Go To Meeting TOOLS
Q&A In your Menu



All attendees are in
listen only mode

Webinar Learning Objectives

- Insights into the myths and realities of Catholic women's philanthropy.
- A deeper understanding of how to apply emerging and effective strategies to increase your philanthropic impact – no matter the size of your charitable giving budget.
- Stories from women who've leveraged their networks and giving strategies to care for others now, and leave a legacy for generations to come.

Expert Speakers and Special Guests

Dana Robinson, Chairman of the NCCF Board of Trustees

Dr. Susan Raymond, Vice President of Program Integration and Chief Innovation Officer, Edmundite Missions and Senior Counsel, Changing Our World

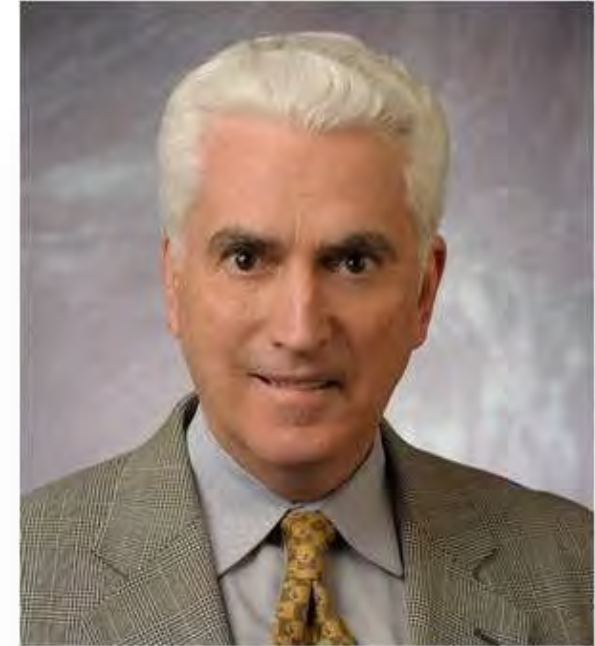
Josephine Everly, Associate Vice President for University Advancement, Catholic University of America and Chair of the NCCF Network Council

Diana Dalton Stieffel, CFP®, Senior Vice President - Wealth Management, UBS Financial Services

Sister Donna Liette, CPPS, Precious Blood Ministry of Reconciliation

Dana Robinson

Chairman of the Board of Trustees of
the National Catholic Community
Foundation.



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Helena “Skipper” Raskob

“When building, build forever – not for the present, but for such times as our descendants will thank us for.”



Dr. Susan Raymond

Vice President of Program Integration
and Chief Innovation Officer,
Edmundite Missions & Senior Counsel,
Changing Our World



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Women's Wealth and Philanthropy: Myths and Trends

Susan Raymond, Ph.D.

VP Programs and Chief Innovation Officer, Edmundite Missions

Senior Counsel, Changing Our World, Inc.

Objectives

The issue before this webinar is how amplify the opportunity for women in philanthropy. And that means, at least in part, understanding their resources, their intentions, and their views about those resources and their use.

We want to begin with evidence about the current status, causes, and trends in

Wealth

Philanthropy

Engagement

*"Philanthropy is not just about money, it's also about being aware of the needs and opportunities for help."
Lisa Howard, Former Trustee, National Catholic Community Foundation*



Myth 1: Women Do Not Have Financial Resources to Engage in Philanthropy



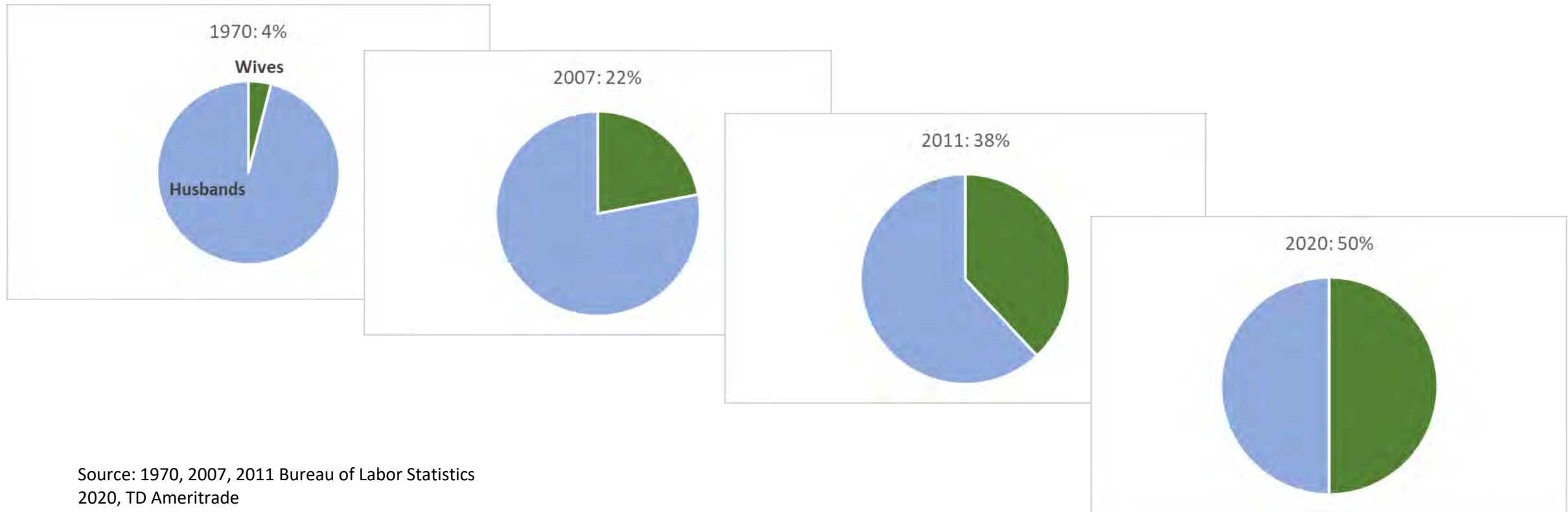
Reality: Women Add \$5 Trillion Every Year to the Global Wealth Pool

In the U.S.

- Today, women control **\$10 trillion** in assets in the U.S., a third of all wealth
- By 2030, women will control **\$30 trillion** in boomer generation assets. That transfer is nearly equal to the entire annual GDP of the United States.
- In the next 20 years, women will control **nearly half of all assets** in the United States.

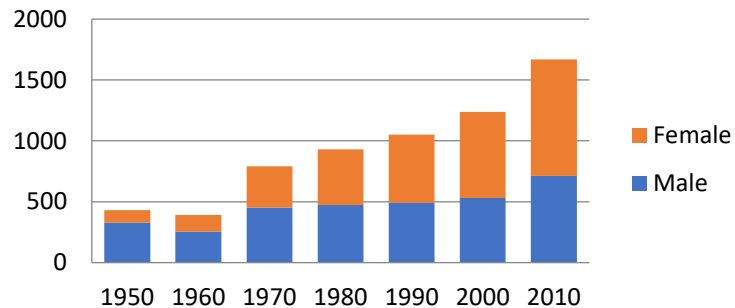
But It Is Not About Boomers -- The Future Is Women of Wealth and Leadership of Other and Future Generations

% of Households in Which Wives Earn More than Husbands

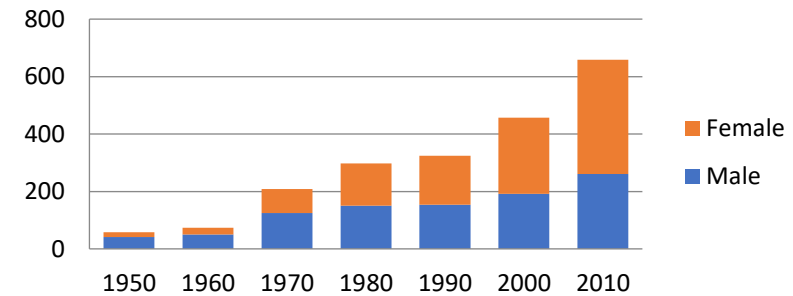


Growing Wealth is Inevitable: Women and Higher Education

BA Degrees Awarded ('000)



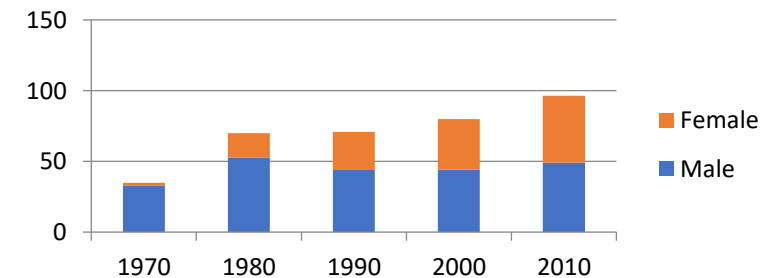
MA Degrees Awarded ('000)



The Inevitability of Opportunity

- Today's 60 year old woman got her BA in 1970 when only **45%** of girls graduating from high school went on to college. Today, nearly **75%** do.
- In 1970, **34%** of women in the workforce had not finished high school. Today, that is fewer than **8%**.

First Professional Degree ('000)

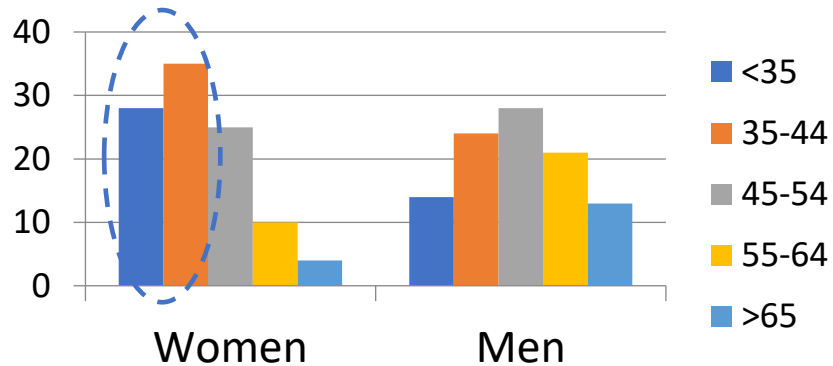


Women in Professions

Medicine

- Half of all medical students are women. As are over a third of all physicians compared to just 10 percent as recently as 1980.
- Wealth effect is yet to be seen since women physicians are still at early career points.

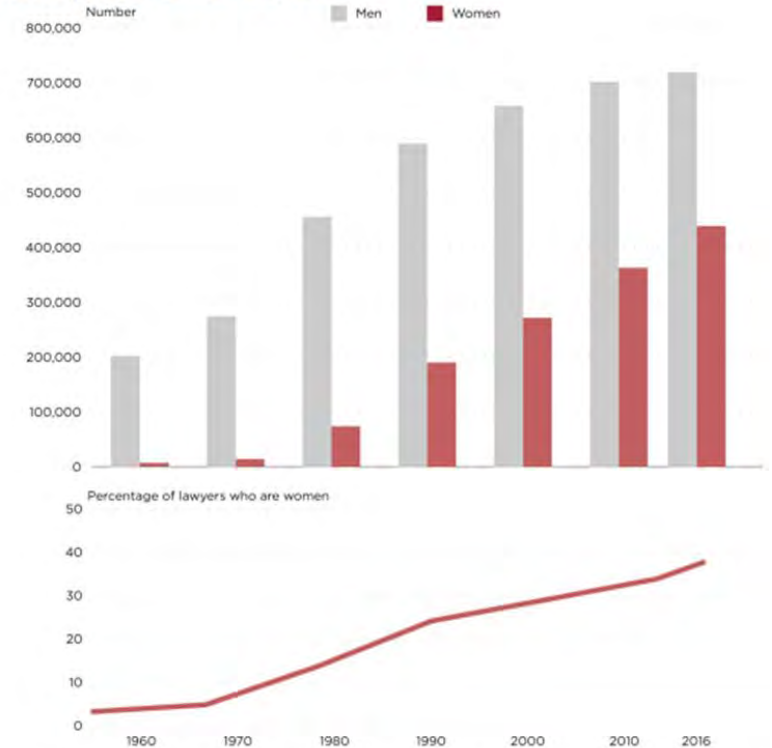
Physician Age Structure by Gender



The Law

- Women comprise 50% of law students and 40% of U.S. lawyers.
- On every count, the last decade has seen a growth in the percent of women in leadership positions in practice, the judiciary and academia.

Lawyers: 1960-2016



Note: Lawyers' refers to the Standard Occupation Classification category of Lawyers, Judges, and Related Workers. For information about confidentiality protection, sampling error, nonsampling error and definitions in the American Community Survey, visit www.census.gov/programs-surveys/acs/technical-documentation/code-lists.html.
Source: U.S. Census Bureau, 2016 American Community Survey.

Business

- Women own 41% of businesses in the U.S.
- 44% of corporations have 3+ women in their C-suite compared to <9% in 2015
- AND, 2020 data show that men and women compensation rates are nearly equal for the same industry, same job and same qualifications



Myth 2: If They Do Have Them, Women Do Not Use Those Resources for Philanthropy



Reality: In every income bracket, women are **more likely** to give to charity than men.

- In top income brackets, women give **more than twice** as much as men. (Indiana University)

But it is not just about giving.....

- 53% of women insist on **ESG** as part of their investment portfolio, an indication that women see wealth as a tool for impact (US Bank)



Myth 3: If They Do Use Resources for Philanthropy, Women Are Emotional Not Analytic

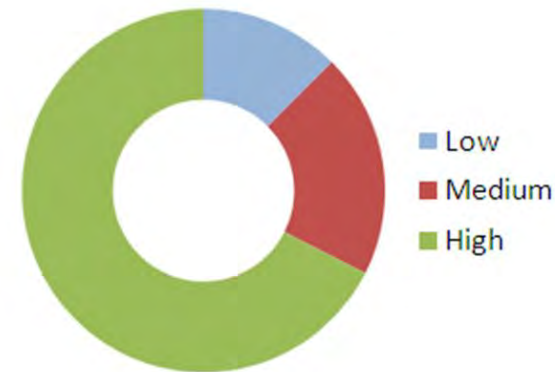


Reality: Women Are More Demanding Than Men

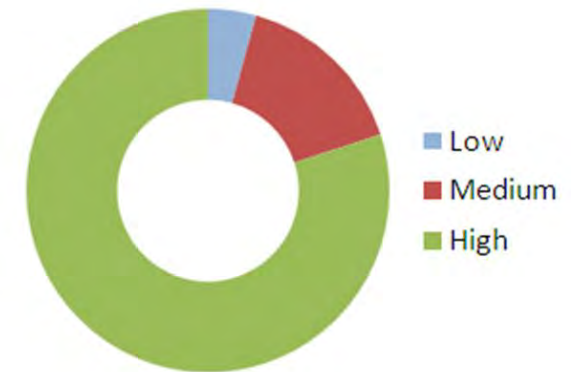
Women are **not passive** about their wealth.

- 10th annual survey by Prudential found that **84%** of women are involved in financial and retirement planning.
- GenSpring survey of HNW women found that that nearly half review their investment portfolio monthly, and **65%** consult with their wealth advisor at least quarterly.
-
- But, **63%** of women would prefer people NOT know that they are wealthy.

How active are you in your family's wealth management?



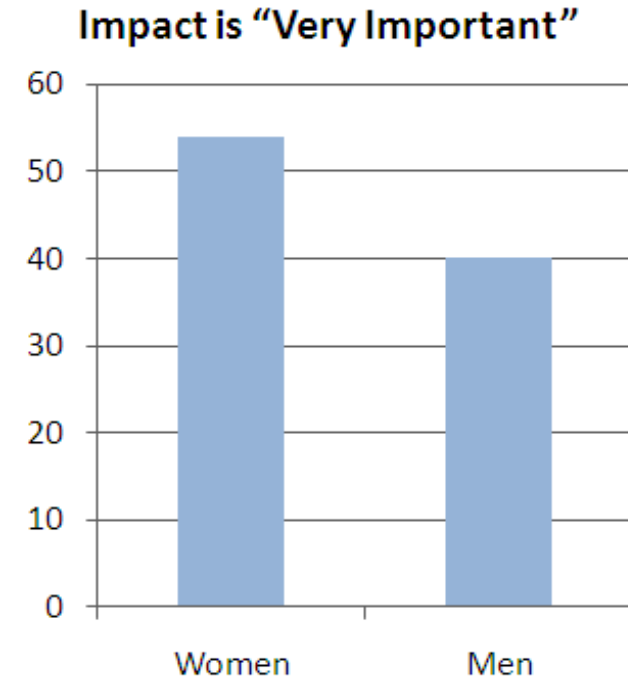
How would you describe your level of understanding of your assets?



Source: The New Wealth Paradigm: The Wilmington Trust/Campden Research, 2010

And they bring that active involvement to philanthropy. **Women want results.**

- Changing Our World/ Campden Research global survey for BNP Paribas Wealth Management emphasized the importance of impact.
- Women are also more likely to see giving as a matter of ethics, 56.6% compared to 43.7% of men.



And that will be even more true in the future

Generation	Need to see direct impact of donation
Gen Y (b. 1981-1995)	60%
Gen X (b. 1965-1980)	50%
Boomers (b. 1945-1964)	37%

Key Takeaways That Drive Strategy





- Women should be part of **all philanthropic thinking**, of all organizations of all types.
- That they are more likely to think of their resources as related to **ethical decisions** means that this imperative is deeply important to Catholic organizations and their philanthropic strategies.
- But women want **results**. They know the value of their money. They are engaged in the value of their money. And they apply that lens to their philanthropy.

Josephine Everly,
Associate Vice President of
University Advancement,
Catholic University of America
and Chair of the NCCF
Network Council



Diana Dalton Stieffel CFP®,
Senior Vice President –
Wealth Management, UBS
Financial Services



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How Catholic Women are Fueling Philanthropy



Donor Advised Funds
Charitable Gift Annuities
Charitable Trusts



1. Checkbook Charity

2. Tax-Advantaged Giving



3. Impact Philanthropy

4. Collective Philanthropy

Genesis of the New Orleans Catholic Women's Giving Circle



5 YEARS
\$600,000
benefitting
16 NONPROFITS

A New Charism

- No limit on membership
- Tiered Membership
- Support for multiple nonprofits and apostolates
- Morally Responsible Giving
- Process: Learn, Pray, Give
- Accountability/Site Visits

5 YEARS
\$711,500
50 Nonprofits

Elements of the Giving Circle

Experiences

- Kick-off Mass and Luncheon
- Sip and Learn
- Prayer and Discernment
- Celebration Mass and Awarding of Grants
- Bus Tours (Site Visits)

Structure

- Partnering with the Community Foundation
- Pooled Donations
- Donor Advised Funds

Governance

- Steering Committee
- Grants Committee



The Impact of Giving Together – Beyond Dollars

Legacy/Next-Gen Participation



Replication



Capacity Building



Women's Giving Circle

*To learn more about the
upcoming Women's Giving Circle,
contact Renee Fusick at
rfusick@nccfcommunity.org*

Thinking About the Future

Susan Raymond, Ph.D.

VP Programs and Chief Innovation Officer, Edmundite Missions

Senior Counsel, Changing Our World, Inc.

The Problem With Thinking Differently

Faced with the choice between changing one's mind and proving that there is no need to do so, almost everyone gets busy on the proof.

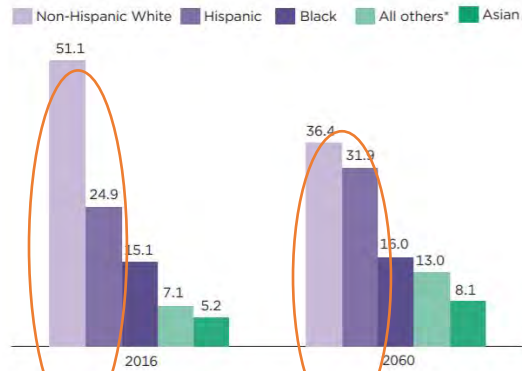
John Kenneth Galbraith

Changing Demographics

- Speed is not important. Trajectory is important.
- Rise of diversity means more than differing ethnicity. It means differing culture.
- This changes expectations, communications, and behaviors when it comes to many things, including philanthropy. It is difficult to engage people you do not know or understand.

U.S. Racial & Ethnic

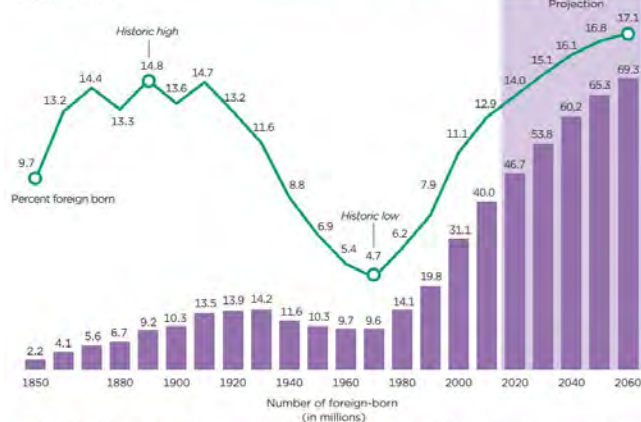
Figure 3.
Racial and Ethnic Composition of Children Under Age 18
The share of children who are non-Hispanic White is projected to fall from one-half to about one-third by 2060. (In percent)



* The other race group includes children who are American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, and Two or More Races.
Note: Hispanic is considered an ethnicity, not a race. The percentages do not add to 100 because Hispanics may be any race.
Source: U.S. Census Bureau, 2017 National Population Projections.

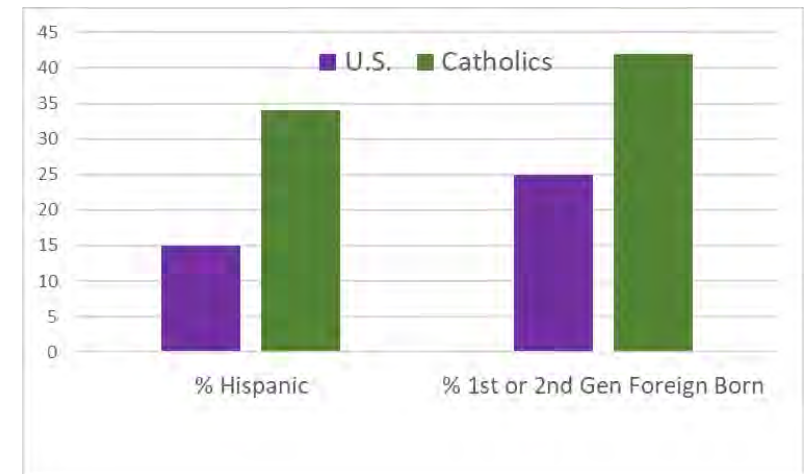
% Foreign Born

Figure 4.
Foreign-Born People Living in the United States: 1850 to 2010, Projected 2020 to 2060
By 2028, the foreign-born share of the U.S. population is projected to be higher than at any time since 1850.



Source: U.S. Census Bureau, 1850-2000 Decennial Censuses, American Community Survey 2010, 2017 National Population Projections for 2020-2060.

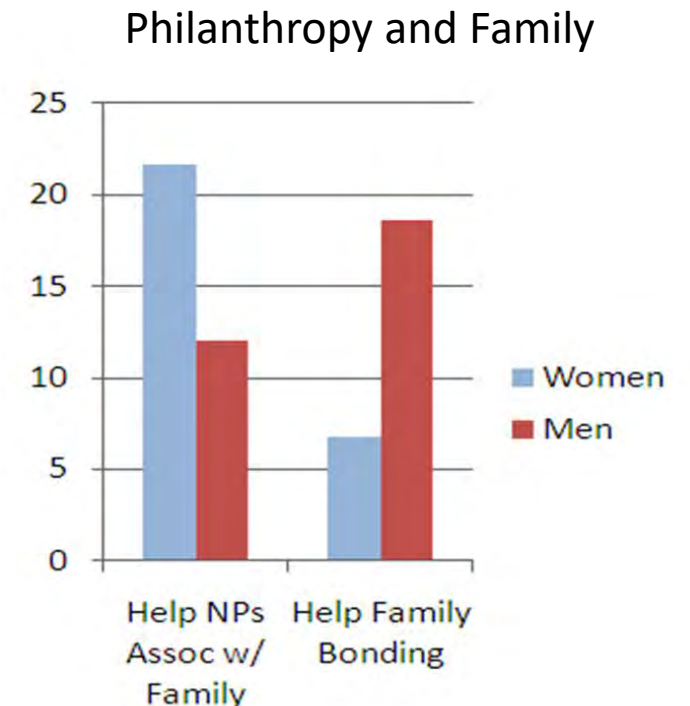
Catholic Diversity



Source: Pew Research

Action and Engagement

- Contemporary philanthropists want you to use what is **between their ears** as well as what is between the sides of their wallets. And women see this as matter of family.
- Successful engagement, however, means involvement in substance and that requires nonprofits to adhere to the **emerging 3 Rs** of philanthropy
 - Respect for knowledge and experience
 - Responsiveness to questions and suggestions
 - Reporting that is complete, transparent and timely
- This is not easy for most nonprofits; it is often less easy for faith-based nonprofits. But easy or not, philanthropy will demand it.



Source: Giving Across Generations

Across Generations

- The NextGen of women will have different perspectives, different ways of communicating, different issue priorities.
- They may also see philanthropy differently, as more a tool of permanent change than as a tool of charity.
- It will not be a matter of simply “including” them; inclusion itself may mean changing both what you do and how you do it. Giving the young **agency** will require it.

*Wealth is ... to feed the hungry
and help people help
themselves.”*

Andrew Carnegie

*We test our assumptions and track
achievements by measuring
outcomes and impacts, and by
understanding how and why we
have succeeded or failed. Outcomes
are the immediate, intended, or
achieved changes in technologies,
systems, populations or behaviors;
impacts are the ultimate,
sustainable changes that we seek.”*

The Bill and Melinda Gates Foundation

Questions and Answers



Closing Prayer
Sister Donna Liette, CPPS





With Special Gratitude

- **All NCCF Trustees, Recipients, Donors**
- **Dana Robinson**, Chairman, National Catholic Community Foundation
- **Edward Robinson**, President, National Catholic Community Foundation
- **Renee L. Fusick**, Director, National Catholic Community Foundation
- **Chad McEachern**, NCCF Trustee, President & CEO, Edmundite Missions
- **Leslie B. Mollsen**, NCCF Trustee, CEO, American City Bureau, Inc.
- **Valerie M. Pletcher**, NCCF Trustee, Senior Director of Philanthropy, FOCUS

Take Action *Resources*

NCCF Contact Information

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Edward Robinson – President

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(410) 923-3222

Read and follow *Advancing the Kingdom* by Dana Robinson

<https://nccfcommunity.org/advancing-the-kingdom/>

Read about the NCCF Board of Trustees

<https://nccfcommunity.org/who-we-are/board-of-trustees/>



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Thank you for attending!

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Crownsville, MD 21032



Valerie Mullen Pletcher, NCCF Trustee

Valerie is nonprofit innovation specialists with over two decades of experience helping philanthropists and nonprofits fulfill their shared missions. Her expertise in nonprofit fundraising education, marketing, and management have made her a frequent guest speaker and trainer at conferences and workshops; including as a keynote speaker at the 2017 Japan Association for Fundraising conference.

Valerie holds a B.A. from West Chester University and an International Advanced Diploma in Fundraising in addition to certificates in Nonprofit Management and fundraising programs. She is a licensed consultant with the Nonprofit Standards of Excellence, TM, and currently leads the development and launch of a national philanthropy and engagement effort and international program for FOCUS, The Fellowship of Catholic University Students. Valerie serves as an NCCF Trustee, a Director of the Inscape Center for Personal Vocation, is a member of the John Carroll Society and the AFP DC Chapter, and teaches 8th grade Confirmation at St. Mary of Sorrows in Northern VA where she lives with her husband, Matthew, and three children, Mary, Maggie and Marlena.

Dana Robinson

Chairman of the Board of Trustees of the National Catholic Community Foundation.

Mr. Robinson is a retired Senior Vice President of PNC Bank . As a member of the Raskob Foundation for Catholic Activities he is actively engaged in several civic and philanthropic endeavors and serves as board trustee for the John B. Lynch Foundation, Wilmington University, and the American Federation Pueri Cantores.



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Dr. Susan Raymond

Susan Raymond, Ph.D., is Chief Innovation Officer and Vice President of Program Integration at Edmundite Missions in Selma, Alabama, and Chief Operating Officer of Edmundite Missions Enterprises, the social enterprise arm of the Missions. She is also Senior Adviser to Changing Our World, Inc.

Susan has extensive experience in research, analysis and planning. She has held positions with the New York Academy of Sciences, where she founded the public policy program, The World Bank, the Center for Public Resources, and the U.S. Agency for International Development. In February 2011, Women United in Philanthropy honored Susan with the Women in Excellence and Achievement Award. In September 2014, she received the John and Patty Noel Humanitarian Award for her work in global health and development. Susan received an Agency Commendation from the U.S. Agency for International Development for her work in Eastern Europe.

In 2012, the Director of the National Science Foundation appointed Susan to the Board of the Civilian Research and Development Foundation. In 2014, she was appointed by the National Academy of Sciences to an organizing committee for a national survey of research and development in the nonprofit sector. She is a faculty lecturer at Columbia University's Institute of Human Nutrition.

Susan is a regular international conference speaker on the future role of philanthropy in economic growth and civil society, and she has published four books and many professional articles on the changing philanthropic landscape globally. Her most recent book, *Recession, Recovery and Renewal: Long-term Nonprofit Strategies for Rapid Economic Change*, was released by Wiley in 2013. Susan earned her B.A. Phi Beta Kappa from Macalester College and her M.A. and Ph.D. from The Johns Hopkins University School of Advanced International Studies in a joint program with the School of Hygiene and Public Health. She has worked on philanthropy and economic development projects throughout Africa, the Middle East, and Eastern Europe, as well as in Russia and Asia.



Josephine Everly

Josephine Everly is Assistant Vice President for University Advancement Catholic University of America. She is an educator, writer, researcher, and speaker with over 20 years of experience in fund development for Catholic universities, community foundations, medical schools and hospitals. She has served as counsel to bishops, Catholic foundations, nonprofits and other organizations.

Previously, Josephine was Chief Operating Officer and Director of Gift Planning for the Catholic Community Foundation of the Archdiocese of New Orleans, Senior Development Officer of the Greater New Orleans Foundation, and Director of Corporate and Foundation Relations for Xavier University of Louisiana.

Josephine received her MA in Philanthropy and Development from St. Mary's University of Minnesota, where she is adjunct instructor. She is also certified as a Chartered Advisor in Philanthropy. She is founding President of #iGiveCatholic and President of the Association of Fundraising Professionals Greater New Orleans. She is author of Planned Giving Toolkits for Parishes, Schools, and Ministries.

Josephine and her husband, Josiah, now live in Old Town Alexandria and are parents to five children and two terriers, Morty and Melba.



Diana Dalton Stieffel, CFP®

Diana Stieffel is a Senior Vice President – Wealth Management with UBS Financial services. She has over 36 years of experience serving both individual and corporate clients. Prior to joining UBS, Diana spent twelve years with Morgan Keegan & Co. where she developed her wealth management practice with a focus on designing and implementing long-term investment, retirement, and legacy strategies for affluent investors. Diana has earned the professional designations of Certified Financial Planner (CFP®), Chartered Retirement Planning Counselor (CRPC®), and Retirement Income Certified Professional (RICP®).

Diana is active in many community organizations in New Orleans and is currently serving on the Board of the Catholic Community Foundation, CCF Professional Advisors Council, and Grants Committee of the CCF Women's Giving Circle. She has served as Co-Chair of the CCF Women's Giving Circle, is past President of the St. Dominic Pastoral Council and a founding member of the St. Dominic Haiti Partnership.

While originally from Philadelphia, Pennsylvania, Diana has lived most of her life in New Orleans. She attended Louisiana State University and the University of New Orleans, where she earned a Bachelor of Science degree in finance. Diana and her husband, Rod, reside in New Orleans and have three young adult children, Emma, Roddy, and Dalton.



Sister Donna Liette, CPPS

Sister Donna is a Sister of the Precious Blood. Presently Sister Donna ministers at Precious Blood Ministry of Reconciliation in the South side of Chicago as a Restorative Justice Practitioner and Director of Women's Programming.

She served 14 years in Dayton, OH as Executive Director of Mercy Manor, a transitional home for women released from the Ohio prisons or drug treatment facilities.

She has also ministered as a teacher, principal, foster mother fundraiser and Spiritual Director.

Her present work includes providing safe places for Mothers who have lost children to incarceration, to the streets or to gun violence to tell their stories, find support, healing, and hope.

She holds a MS in Education Administration from New York University and an MA in Pastoral Counselling from Loyola University, Chicago.

For relaxation, she enjoys planting and caring for the flowers in the Precious Blood Peace Garden.



Renee Fusick

Director
National Catholic Community Foundation

Mrs. Fusick has over 20 years experience in the financial and banking industry. She started out of college as a leader in the mortgage industry and moved into banking as an Assistant Vice President at Bank of America. Renee received her Bachelor of Arts from the University of Maryland, College Park. She joined NCCF three years ago. Renee lives on the Eastern Shore of Maryland with her husband Dave and seven-year old daughter Sophia. The Fusick's are parishioners at St. Christopher's Church in Chester, MD.



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