



FOUNDATION
for the Diocese of Helena

**Working to Build Our Faith
for Generations to Come**

ANNUAL REPORT FISCAL YEAR 2022

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What IS the Foundation for the Diocese of Helena?

Most people will be surprised to know, while the Diocese is in our name, the Foundation IS NOT part of the Diocese . . . but we work very closely with it. It is a not-for-profit 501(c) (3) entity that was created in 1978 to help build the future of our faith.

The Foundation's Mission

Our Mission is "to serve and strengthen the people, parishes, ministries, and apostolic mission of the Diocese of Helena."

We do this by working with parishioners, parishes, missions and ministries throughout our Diocese to build endowment funds that can help perpetuate our faith into the future for generations of Catholics to come.

Our FAITH IN ACTION Grants Program has given away more than \$1.1 million to parishes and ministries in our Diocese since 2007. In 2022 alone, we gave more than \$100,000 in grant money. (see article on page 8)

Our Board of Trustees is made up of hard-working representatives from every deanery in the Diocese (see Board list on this page) and has three staff dedicated to the amazing power of faith.

We provide donation options that help parishioners save taxes and plan their final legacy. We manage 164 endowments including one for every parish and mission and many family endowments designed to personalize their faithful giving.

Since 1978, the Foundation has distributed more than \$13 million from endowment earnings to parishes, missions and ministries. We provide a future for each of our parishes by working with the faithful to build their endowments so that one day, the quarterly distributions they receive from their fund will be large enough to support the parish and its ministries.

THIS is what the Foundation is. A forward-thinking ministry that strives to preserve our beautiful faith for your children's grandchildren and beyond. Together with your generosity, we are building and perpetuating our faith.

People of God,

I pray you are all well and experiencing a beautiful renewal of faith. Jesus has risen! But what does this mean for us...today...in the now of this moment? It starts with an encounter with who God is, and what Jesus has done intimately and personally for us through His passion.

God is a giver. All throughout scripture we can trace God's character as such. More than that, we can trace this reality through each moment of our lives. Acts 17:25 says "Rather it is He who gives to everyone life and breath and EVERYTHING." It makes sense, especially after walking with Christ through His passion, death, and resurrection. "For God so loved the world that He GAVE" (Jn. 3:16). Not just a cookie, or an extra scoop of ice cream (which God undoubtedly loves to do), but His beloved Son. Imagine if we began to look at life in this manner...not that I earned this, but instead that God gave all. What sort of gratitude would expand within us?

This generous Love didn't end 1,990 years ago on a cross outside of Jerusalem. It was breathed out into all of eternity and continues to cascade into every crevasse of our life. Are we surprised? In his last intentional act with his followers, Jesus took bread, said the blessing, broke it, and gave it to them, saying, "This is my body, which will be given up for you" (Lk 22:19...or in the Mass). Jesus established a way to give the fullness of Himself, over and over, under the most ordinary guise of bread and wine, to us in the sacrament of the Eucharist, so that the totality of His gift would never cease!

Here is the kicker, the place where it all gets really exciting: if we are made in the image and likeness of God, and we continue to receive the fullness of Jesus and His love for us in the large and small, what does that mean for who we have been created to be? It means that we become more ourselves, the more we give ourselves away.

Lord, let our hearts look more and more like Your sacred heart, aflame and alive with Your gift of love.

Thank you for the generosity of prayers and gifts that you share with the Foundation and the work we do.



In Christ,

A handwritten signature in blue ink that reads "Daniel Thies".

Daniel Thies
Executive Director

A heartfelt thank you to Ron Johnson, Anaconda Catholic Community, who served on the Foundation's Board of Trustees 2013 -2022. We are grateful for your time, your expertise and your friendship. Thank you for serving the Lord through this ministry.





A Picture of Faith

At the Foundation, we get to witness and be inspired by the amazing faith of the people of our Diocese. Everyone faces challenges and obstacles in their faith and people share their journeys with us as they travel with the Lord. We want to share the story of a parishioner who truly inspired us this past year through her humility, obedience, and generosity.

Ida Theis (pronounced Tice) is one of those people that makes you feel good. She has a beautiful, profound faith and she shares it willingly in a way that makes your own faith life feel enriched, even after the briefest of conversations.

Continued on pg 5

Priestly Formation and Parish Match Program—Results of 2022 programs

Matchmaker

We love a good match! And given the success of the two match campaigns held in 2022, we feel confident saying our parishioners love them, too! No, we aren't talking about matches on dating apps, but rather the kind that allows us to raise money in praise and thanksgiving to our Savior. The kind of match that inspires generosity, through the love of Christ, in others.

In 2022, the Foundation offered a parish match and thanks to a generous family, an additional match for Priestly Formation. ***Together those matches raised nearly \$148,401 for the hope and future of our faith!***

\$300 How much the FOUNDATION gave each parish endowment.
+

\$300 If a parish received \$300 worth of gifts to the church endowment by March 31, the church received another ...
+

\$300 matching gift from the FOUNDATION!

\$900 Total

Parish Endowment Match

At the beginning of each calendar year, the Foundation runs a match campaign for parishes. You may recognize this from the ads we run in your church bulletin

Thanks to your generous hearts, the Foundation raised and granted over \$46,170 to parish endowments in this match campaign for the endowments of 68 of churches.

Priestly Formation Match

Later in the year, we were approached by a couple who offered a \$50,000 match for funds raised for the Priestly Formation and Development Endowment to honor their parents who had recently passed. Their matching gift was an invitation to give other hearts the opportunity to expand in love through generosity and help support our priests and educate seminarians. It was so graciously received by so many that we surpassed the amount of this grant! ***We didn't raise \$50,000 to get this match, we received \$57,085!*** The donors of the match chose such a beautiful way to remember the faith their parents showed their entire lives.

Our thanks to all of you who gave. Every dollar counted. Every dollar mattered. When you say "yes" and share God's generosity, beautiful things happen. Thank you for your support. We are inspired and blessed by your generosity and we pray that the hand of God is reflected in everything we do at the Foundation.

She spent years as the sacristan at St. Jude's in Lincoln, deeply involved in parish life, and then Mass was suspended at the parish in 2022 due to the shortage of priests. "I saw it coming," Ida explained, "yet, when it happened it still came as a surprise."

This change has been emotional for so many of the faithful. "I was a sacristan and I saw the numbers going down. It's never as simple as it looks on the outside. Our priests have so much to do— more than people realize."

"For me personally, I had to ask, now what?" Ida and her husband Dan were deciding where they would attend Mass. They chose to make the drive to St. Theodore's in Avon each Sunday. She shares, "When we walked into St. Theo's that first Sunday, I met Seminarian Brett Rotz. I went home and watched a video online about Brett. In that video he talked about how he came to Carroll College and was first exposed to the idea of becoming a priest. He explained about his calling to the priesthood."

Father Bart (Tolleson) gave a homily around that same time at Mass in Avon, and he shared the story of his friend Fr. Stuart Long. Fr. Joe Fleming later explained to the congregation that Fr. Stu, who suffered from a disabling auto-immune disease that ultimately killed him, offered up his sufferings for vocations for the Diocese. Two weeks later at Mass, again in Avon, Ida met Seminarian Dillon Armstrong. "I wasn't looking for it, but these things kept coming to me," Ida explained.

A big reader, Ida began a book written by Kathleen Beckman: *Praying for Priests, an Urgent Call for the Salvation of Souls*. "Her book talks about the need for spiritual motherhood, and Mother Mary is the example of that for us. We need to pray for sanctification for priests." She also read *Insinu Jesu*, a book written by a Benedictine monk who encourages spending time in Adoration in reparation for and sanctification of priests. "These books spoke to me. They ask people to pray for our priests. It gave me a vision of what I needed to do."



"There are still a lot of people who are upset about the suspension of Mass at St. Jude's in Lincoln. You can't maintain the integrity of a parish without sharing the Eucharistic liturgy and sharing the Eucharistic bread that unites many as One Body. But my dad said if you don't like something, get on your knees and pray about it. So I decided to do two things: 1) Pray about it, and 2) Support the formation of new priests."

Ida has followed through on both of those commitments. She got a copy of the Seminarian poster from her church and spends time in prayer every day, praying for each of the seminarians by name as well as for future vocations to the priesthood. "In the book *Praying for Priests*, the author shares prayers we can say, and encourages praying the rosary. I would recommend doing that so we can all become Spiritual Mothers to these seminarians."

"I saw in the bulletin that the Foundation had a match to raise funds for Priestly Formation and Development." Ida, along with many others in our diocese, helped the Foundation reach the match goal for Priestly Formation. This \$50,000 match goal raised a total of \$107,500 in support of our seminarians and priests.

Our thanks to Ida Theis and the many Catholics who, like her, offer up their challenges in communion with Jesus, knowing "Thy will be done". God invites us to grow closer to Him through our sufferings, and if we let Him, as Ida did, the Lord transforms our sacrifices into something more beautiful and faith-affirming than we could ever imagine.

Prayer for Seminarians

Heavenly Father,

We thank You for the many gifts You bestow on the people of the Diocese of Helena. We ask that You continue to bless the good men preparing to give their lives as holy priests for the service of the Church.

May those called to the priesthood of Jesus hear Your voice and give their generous “Fiat” as Your Mother did. Grant them zeal for the Gospel, dedication in bringing the sacraments to the faithful, and a life rooted in humble prayer. May their hearts burn with the fire of Your love.

We ask this through our Lord Jesus, Your Son, who lives and reigns with You in the unity of the Holy Spirit, God, forever and ever.

Amen

**PLEASE PRAY FOR OUR SEMINARIANS
AND FOR MORE PRIESTLY VOCATIONS**

**To send encouragement or ask for prayers,
please write our men at their respective seminary:**

Pontifical North American College
00120 Vatican City State | Europe

The St. Paul Seminary School of Divinity
2260 Summit Ave. | St. Paul, MN 55105

St. John Vianney Theological Seminary
1300 South Steele St. | Denver, CO 80210

SEMINARIANS

FOR THE DIOCESE OF HELENA

2022-2023



Dcn. Kyle Tannehill
Theology IV
St. John Vianney Seminary



John Cooney
Theology I
St. John Vianney Seminary



Kaleb Mitchell
Theology I
Pontifical North American College



Riley Helgoe
Philosophy II
St. John Vianney Seminary



Brett Rotz
Philosophy II
St. John Vianney Seminary



Alex Olmes
Philosophy I
St. John Vianney Seminary



Anthony Olmes
Philosophy I
St. Paul Seminary



Carter Anderson
Spirituality Year
St. Paul Seminary



Shae Bills
Spirituality Year
St. John Vianney Seminary



Lane Buus
Spirituality Year
St. John Vianney Seminary



Matt Keck
Spirituality Year
St. Paul Seminary



Jamie Severson
Philosophy I
St. John Vianney Seminary



Jack Peed
Spirituality Year
St. Paul Seminary



James Semling
Philosophy I
St. Paul Seminary



Dillon Armstrong
Theology II
St. John Vianney Seminary

An Invitation to An Encounter With Christ

In between two sets of doors at Resurrection Parish on the MSU campus in Bozeman is access to the parish's new Adoration Chapel. A space where students and parishioners alike can go to spend time with Jesus; time to pray, time to discern, time to encounter Christ.

Adoration is beneficial to parishioners and students alike. "It is the one place outside of Mass where you see both the older parishioners and the students, the older and younger generations praying at the same time," explained Fr. Matt Christiaens, Parochial Vicar at Resurrection Parish. "Adoration awakens something in you, it draws you to it. There are so many people who receive their discernment through Eucharistic Adoration. Adoration is a helpful aid to make sure we are listening to Christ."

In June of 2022, Resurrection Parish applied to The Foundation for the Diocese of Helena Grant Program for a \$5,000 grant to purchase an exposition tabernacle. With a focus on evangelization, the Foundation's Outreach Committee (who oversees the Faith in Action Grants Program), was delighted to award this gift to the Bozeman parish.

"Hopefully the increase in adoration time will have a ripple effect. It is in line with the Eucharistic Revival and calling people back to an encounter with Christ in the Eucharist. It solidifies us to a relationship with Christ and knowing that it changes the way we as Catholics live," shared Fr. Matt.



\$1.1 Million+
Grants Awarded

In 2022, the Foundation awarded more than \$100,000 in grants to parishes and ministries within our Diocese. This was a record-breaking year! The first time since the Grants Program was founded that we were able to give over \$100,000 in a single grant cycle.

The Foundation Grants Program began in 2007. It was the idea of our Board of

Trustees who wanted to do more for the Diocese. In those 15 years, the program has given more than \$1.1 million dollars in grants!

Grants have been given to every parish and mission in the Helena Diocese, along with ministries including Catholic Social Services, several diocesan schools, the Guatemala Mission and more. During Covid, the Foundation Board suspended the grant application process and gave an equal grant to every parish in the Diocese in an effort to support our faith during an unprecedented time of crisis.

These grants have been used for everything from training of staff to teach Religious Education, to an autoclave at the Guatemala Eye Clinic to help people see. The monies have helped parishes upgrade and repair their churches and social centers as well as provide new instruments to help sing praises to God.

In 2023, big positive changes came to the Grants Program with a name change and focus on evangelization. Our 2024 grants cycle opened the middle of March with the new name of "Faith in Action Grants" and rather than funding capital improvements, the focus of these grants is sharing the Good News of Christ our

The new tabernacle was put in place on February 19, 2023. The regular Sunday evening Mass was held and then Fr. Joe Paddock and Fr. Matt Christiaens led a Eucharist procession from the altar to the Adoration Chapel. The beautiful bronze tabernacle contains a window in the front where the Eucharist is placed, ready for prayers and worship.

Currently the Adoration Chapel is open from noon on Tuesday through noon Wednesday. "The long-term goal is to build up to perpetual 24/7 adoration. We aren't there yet, but this will help the parish grow towards that. The next step is to extend it from Sunday evening through Wednesday and keep extending the hours until is available 24/7.



Resurrection Parish held a Eucharistic Processional with Bishop Austin Vetter around the campus on May 7th, starting and ending at the new Exposition Tabernacle. This is truly "Faith in Action" and a beautiful evangelization to the parishioners and students who use the Adoration Experience to grow their faith. This is the reason the Foundation's grants program is so important as it works to bring communities closer to Christ.

Savior! Our dream is to see transformative evangelization in parishes, communities and throughout our Diocese.

Historically, grants up to \$5,000 have been provided, but in this next grant cycle we are going to DREAM BIG, giving one grant worth up to \$15,000! One transformative DREAM BIG grant will be awarded to a grant application that actively and imaginatively seeks to build an endeavor that reaches outside the walls of a parish and into its community to bring the Good News and God's love to all people.

Leadership in Action

Funding for the Grants Program comes from current and past leaders. The Foundation Grant Program began in 2007 with a dream from the Board of Trustees to "do more" for our parishes and ministries.

They made this dream personal by providing the initial funding through individual donations for an Endowment that builds and supports the Grants Program. Trustees current and past continue with gifts made to the Trustee's Endowment annually.

These are foot soldiers for Christ who have advocated for our parishes and ministries; leaders who have made great things happen for the past 15 years in the name of our Lord with the earnings that fund the Faith in Action Grants program.

"That they
may see the
good that
you do and
give glory
to God"

— MATTHEW 5:16

Endowments at the Foundation

Each endowment at the Foundation is a beautiful story of faith and generosity. If you would like to know more about the purpose of each endowment or learn how to initiate an endowment in your family's name, please call the Foundation at (406) 389-7050 or email Dan Thies at dthies@dohmt.org.



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Named Family Endowments

Families have created named endowments for the benefit of the parishes, missions, ministries and scholarships that are close to their hearts.

7

Catholic Ministries Endowments

Catholic Social Services of MT Birthmothers
Good Samaritan Ministries & Thrift Store
Catholic Relief Services
Montana Catholic Conference
Sycamore Tree Contemplative Prayer Center

13

Diocesan Endowments

Bishop's Pastoral Outreach
Aid to the Needy
Apostolic Mission
Clergy Senior Status and Security Trust
Lay Ministry and Diaconate Training
Priestly Formation and Development
Seminarian Education
Spiritual Growth and Renewal

70

Parish & Mission Endowments

The Foundation has an established endowment for each parish and mission in our diocese.

5

Catholic School Endowment (Diocesan and Private)

St. Andrew School (Helena)
Divine Mercy Academy (Belgrade)
De LaSalle School (Browning)
St. Matthew School (Kalispell)
(2 funds)

4

Cemetery Endowments

Holy Cross Cemetery (Townsend)
St. Anne's Catholic Cemetery (East Helena)
St. Richard Parish Cemetery (Columbia Falls)
Resurrection Cemetery (Helena)

4

Youth and Young Adult Ministry

Legendary Lodge (2 funds)
Youth and Young Adult Ministry and Formation
Catholic Education & Experience for Kids St. Anthony Missoula

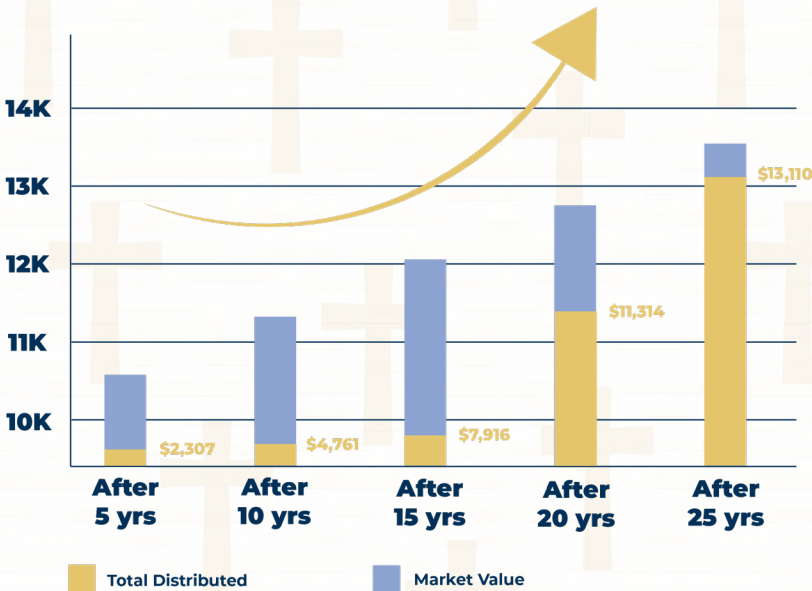
A Ministry to Give Hope and a Future

For I know the plans I have for you,” declares the LORD, “plans to prosper you and not to harm you, plans to give you hope and a future.”
— Jeremiah 29:11

This piece of scripture just seems to sum up the work of the Foundation for the Diocese of Helena. Our Mission is “to serve and strengthen the people, parishes, ministries and apostolic mission of the Diocese of Helena.” We do that by raising funds not just to pay for a project or a seminarian’s education, we raise funds that will last into perpetuity so our parishes and ministries will be able to bless your children’s grandchildren and beyond.

We do this through endowments. Every parish and ministry in the Helena Diocese has an endowment at the Foundation. When you make a gift to the Foundation for the benefit of a specific parish (for example), that donation goes to the named parish’s endowment. The principal of our endowment funds is never touched. Quarterly distributions are made to every endowment fund with a principal balance of at least \$5,000 (by July 1 each year). These quarterly distributions are used by the parishes and ministries to supplement their annual budget, pay for special projects or help fund evangelization efforts within their communities.

Here is an example of the impact a gift of \$10,000 has towards an endowed fund. Over 25 years, it will distribute \$13,110.95! It’s as if God gives us the opportunity to be part of the future of faith, long after we leave this world. A gift to an endowment allows us to continue contributing to our faith, our parishes, even decades after we have left this earthly realm!



Your gifts to endowments help fund the hope and future of our faith. A complete list of endowments is available at FDOH.org or you can create a named endowment that benefits specific Catholic ministries. You can give online (fdoh.org), donate stock, write a check, or give through your IRA or an annuity. Recurring monthly giving opportunities are available online. If you are interested in tax-savings that may be obtained, we are happy to help you individually.



TOTAL NET ASSETS

\$11,838,102
Parish Ministries

\$8,460,850
**Bishop's Pastoral
Outreach**

\$6,118,011
Priestly Support

\$2,084,894
**Youth & Young adult
Ministry**

\$1,442,684
**Other Diocesan
Ministries**

\$1,386,248
Guatemala Mission

\$1,270,665
**Aid to the Needy/Social
Justice**

\$777,706
Other (Non-Diocesan)

\$447,510
Operations Reserve

\$33,826,670
Total Net Assets

Summarized Statement of Financial Position Fiscal Year 2022

ASSETS

Cash and Equivalents	2,772,658
Investments	30,881,363
Pledges Receivable for Legendary Lodge	0
Note Receivable	0
Other Receivables	184,127
Charitable Remainder Trusts	578,049
Gift Annuities Held by Diocese	244,801
Legendary Lodge Land and Buildings, net of depreciation	3,287,580
Other Assets	5,759

TOTAL ASSETS **37,954,337**

LIABILITIES

Grants and Endowment Distributions Payable	274,975
In-kind Contribution of Legendary Lodge to Diocese	3,531,602
Gift Annuity Obligations	312,270
Other Payables	8,820

TOTAL LIABILITIES **4,127,667**

NET ASSETS

Unrestricted - Operations	374,833
Unrestricted - Board Designated	320,074
Unrestricted - Board Designated for Legendary Lodge	(251,379)
With Donor Restrictions	33,383,142

 **TOTAL NET ASSETS** **33,826,670**

**TOTAL LIABILITIES
AND NET ASSETS** **37,954,337**




Summarized Statement of Activities Fiscal Year 2022

REVENUE

Contributions	885,104
Investment Gains and Income	(3,966,829)
Miscellaneous Revenue	2,004
In-kind Contribution Revenue - Legendary Lodge	113,453
Change in Value of Split Interest Agreements	(167,972)
TOTAL REVENUE	(3,134,240)

EXPENSES

 Program - Grants and Distributions	1,033,828
Program - Outreach	155,544
Program - In-Kind Contribution Legendary Lodge	106,310
Fundraising	23,340
Management and General	124,669
TOTAL EXPENSES	1,443,691
Increase (Decrease) in Net Assets	(4,577,931)
Net Assets - Beginning of Year	38,404,601
Net Assets - End of Year	33,826,670

TOTAL DISTRIBUTIONS

	\$332,932
Parish Ministries	
	\$253,015
Bishop's Pastoral Outreach	
	\$160,023
Priestly Support	
	\$116,812
Youth & Young adult Ministry	
	\$46,576
Other Diocesan Ministries	
	\$56,686
Guatemala Mission	
	\$50,923
Aid to the Needy/Social Justice	
	\$16,860
Other (Non-Diocesan)	
	\$1,033,828
Total Distributions	

By The Numbers, Fiscal Year 2022



33,826,670

Total Net Assets



\$885,104

Gifts Received



\$1,033,828

Grants and Endowments Distributed



164

Number of Endowment Funds Managed



220

Number of Charitable Gift Annuities Managed



3

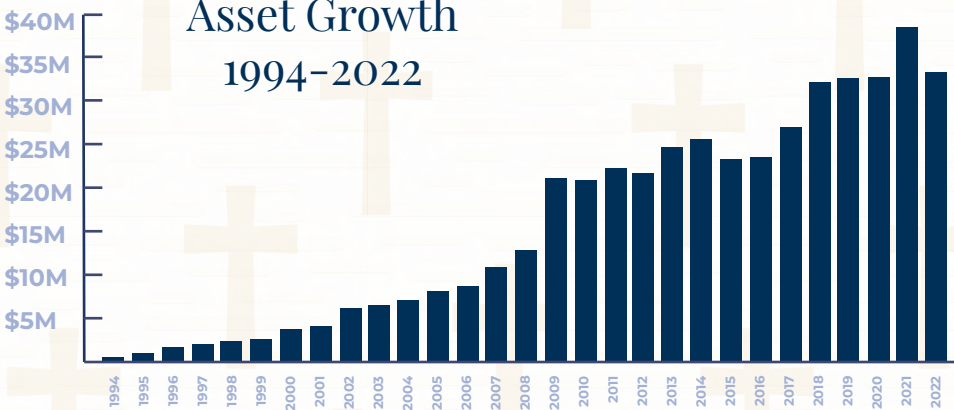
Number of Staff



17

Number of Board Members

Asset Growth
1994-2022





My dear friends in Christ,

Your generosity is so heartwarming for me as your Bishop because it reflects your deep faith, As you share the faith with others and make new disciples of Jesus, you cooperate in His saving work. I humbly thank you for all your gifts and your many prayers.

I also want to thank the Foundation for the work they do to build the parishes and ministries within our Diocese. They focus not only on our present, but also on the future of our faith and helping to make sure your grandchildren's children can worship as we do today.

We have a wonderful group of young men in the seminary, studying to be our next generation of priests. They are so important to our diocese, but their education comes with a price tag. The Foundation helps us to raise money for our seminarians and priests alike, so they can learn and grow and bring us the sacraments of salvation.

The Foundation raises money to help our parishes have a future. When you give a gift to your local parish endowment at the Foundation, it supports your parish long after you die. And a legacy gift left through the Foundation can make a huge difference in how your parish will be sustained five, 10 or 100 years from now! It is a gift of love for your church and future generations of the faithful.

I have asked the Foundation to lead our Campaign for Catholic Life. You will be hearing more from them—and me—over the next few years and I look forward to talking to you about it and experiencing how this campaign will bring us all closer to our Lord, opening our hearts. This campaign is not solely about raising money, it is about hearing the voice of Jesus and making His call the most central and important focus in our lives.

Thank you for your generosity to the Foundation. Know of my prayers for you, and please keep me in yours.

In Christ, I am

Bishop Austin A Vetter
Bishop of the Helena Diocese

But how can they call on him in whom they have not believed? And how can they believe in him of whom they have not heard? And how can they hear without someone to preach?

And how can people preach unless they are sent? As it is written, “How beautiful are the feet of those who bring [the] good news!”

— ROMANS 10:14-15



BECAUSE
HE FIRST
Loved
US....

A CAMPAIGN FOR CATHOLIC LIFE

The Lord has exciting plans
for our Diocese to set our
hearts ablaze anew!

MORE INFORMATION COMING SOON

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