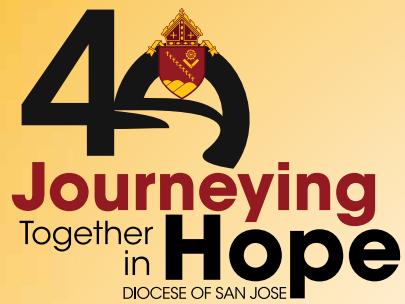


JULY 1
20
21



IMPACT REPORT





40th Jubilee Prayer

Ever-living and faithful God,
we give you thanks for walking with us,
your people of this Diocese of San José.

Pour forth your Spirit on this local Church,
that our works of Faith and labors of Love
may lead others to Jesus, your Son,
and that our endurance in Joy and Hope
may lift up those weary from uncertainty.

Accompanied by Saint Joseph and
Saint Clare, may we continue
"Journeying Together in Hope"
and day by day be drawn closer
to your Son, our Light, our Hope, and our
Salvation, who lives and reigns with you
and the Holy Spirit forever and ever.

Amen

Some of the photos in this document were taken before the pandemic or prior to the Delta surge when masks were not required indoors.



Year in Review



10,490 sacraments



parishes and missions

54



priests
135

schools with
8,717
students (Pre-K to 12th)



religious education
students (Pre-K to 12th)

6,833



238
religious sisters



26
religious brothers



28
permanent
deacons



620
catechists

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As missionary disciples of Christ, the chancery assists the Bishop in the administration and pastoral care of our multicultural Church, collaborating with parishes, schools, and other agencies to build the Kingdom of God.



I thank our parishioners who have faithfully supported both their parishes and the ADA with their sacrificial donations of treasure, time, talent, and prayers!



Dear Brothers and Sisters in Christ,

From the time of Abraham and Sarah, God's people have always been called to journey. Our local Church in the Diocese of San José has journeyed 40 years in faith, hope, and love. This year, we have been looking back at our history. We appreciate God's presence and work among a diversity of people in Santa Clara County.

Yet, the arrival of the pandemic changed life for everyone. Parishes and schools closed. Public Masses were canceled. However, showing resiliency, perseverance, creativity, we (pastors, priests, religious, parishioners, teachers, students, staff, and, indeed, our entire diocesan family) banded together, and determined that physical distancing did not, would not, mean spiritual distancing!

The chancery (the central administrative and ministerial support offices of the diocese) closely partnered with our parish and school communities to help them weather the pandemic storm thanks to the funds from the Annual Diocesan Appeal (ADA).

I thank our clergy and lay ministers who have been on the frontlines celebrating the Eucharist and sacraments amid stringent requirements; passing on our faith to our children and youth; providing food and support for those who have lost their jobs and housing; educating children; and preparing ministers for a virtual environment amid the devastation of COVID-19.

I thank our parishioners who have faithfully supported both their parishes and the ADA with their sacrificial donations of treasure, time, talent, and prayers!

This crisis has tested us. However, as you will see in the following pages, the strong partnership between parishes and schools with the chancery helped our parishes and schools to continue serving and ministering during the unprecedented pandemic.

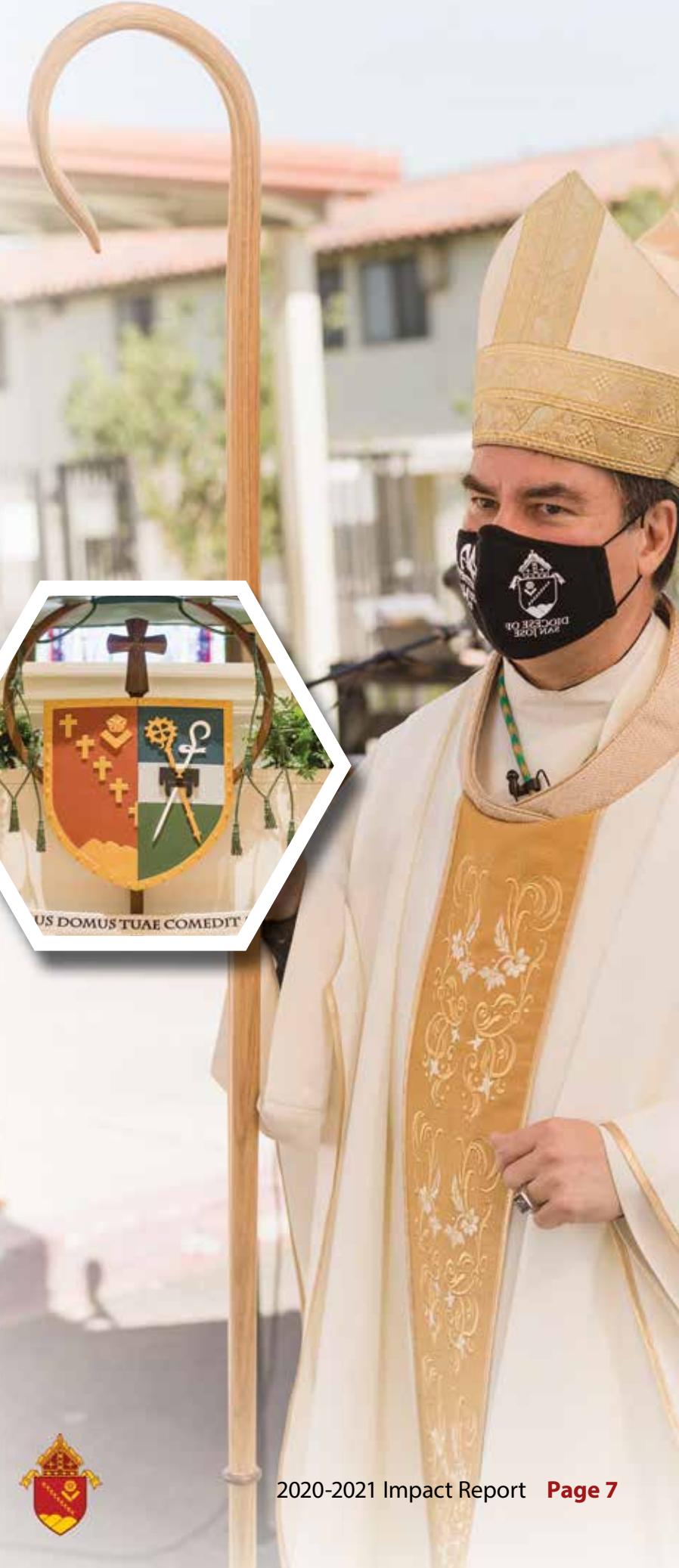
We are one family, one community of faith, journeying TOGETHER in hope. With your generosity, we will continue to support each other in doing the work of Christ. What a beautiful example of that family support in witnessing the chancery, parishes, and schools working together during the pandemic to serve the spiritual and personal needs of our flock!

With gratitude and blessings,

Most Rev. Oscar Cantú
Bishop of San José



We are
one family,
one community
of faith,
journeying
TOGETHER
in hope



PARISHES

Our parishes recognize the power of digital technology and welcome it as a powerful tool for reaching people and sharing Christ with others.



- Nearly all 54 parishes and missions in our diocese were livestreaming Masses during the pandemic.
- Once we could begin in-person Masses, parishes offered outdoor and drive-in masses to celebrate together.
- Pastors turned to digital channels to communicate with their parishes to build community while people were physically distanced.
- Outreach to the homebound continued in virtual ways.
- Seven parishes regularly hosted food distributions for those in need.

IMPACT CHRIST ALIVE DURING THE PANDEMIC



CATHOLIC SCHOOLS



The Diocese of San José's 26 Catholic elementary schools and one Catholic high school proudly serve nearly 9,000 students within Santa Clara County, focusing on communion, formation, and stewardship.



IMPACT

The 2020-21 school year was unprecedented, redefining the landscape of education. Despite the many challenges, the year was marked by solidarity and hope. United as a Diocese, our Department of Catholic Schools, principals, teachers, and staff came together to redesign faith, socio-emotional, and educational opportunities to deepen the support of every child and continually strengthen the ministry of Catholic education.

After pivoting in a matter of days to distance learning in March 2020, the schools began welcoming thousands of students back to campus in October 2020 while remaining fully committed to serving all families who chose to remain remote. The principals worked tirelessly to ensure safety protocols were in place to prevent COVID transmission. The teachers developed comprehensive learning plans and designed new opportunities to unite those on campus with those at home so that each child felt safe, supported, and connected with one another. Our educators and parents partnered to ensure that while instruction looked different, our students continued to grow academically, personally, and spiritually – overcoming the learning loss and isolation that impacted so many children across the country.

Throughout the year, our schools, families, and students were a beautiful witness to resilience, love, and grace. Together, we kept every school open and united as a community of faith during the pandemic.





ADA 2021
ANNUAL DIOCESAN APPEAL

Journeying Together in Hope

DIOCESE OF SAN JOSE

40

Make your pledge or give today www.dsj.org

STEWARSHIP AND DEVELOPMENT

This team creates opportunities for the Catholic faithful to accept the invitation to support the Church's mission in Santa Clara County. In addition, we conduct the Annual Diocesan Appeal (ADA), assist parishes, and engage donors personally and in groups to foster a culture of stewardship and support the Church's mission.

Because of the COVID pandemic, we also worked closely with pastors and parish staff to help them implement online giving and apply best practices for remote parishioner engagement.

Many parishes expressed concern about facilitating their weekly donations during the suspension of all in-person liturgies. The Diocesan Stewardship and Development team helped parishes set up online giving and implemented QR codes for all our parishes. Our team also supported several parishes in running fall sacrificial giving appeals to increase their weekly collections.

Each year, the Stewardship and Development Team conducts the Annual Diocesan Appeal (ADA) to support the Mission of the Catholic Church. The ADA provides financial support for Diocesan ministries and services that serve all parishes, schools, and local communities in the Diocese of San José. The ADA also allows parishes to raise significant funds, since all funds raised over a parish's individual goal are fully rebated back to the parish for local priorities.



IMPACT

- Supported parishes with sacrificial giving appeals.
 - ✚ Christ the King Parish, San José
 - ✚ Our Lady of Guadalupe, San José
 - ✚ Saint John the Baptist, Milpitas
- Created an online giving page for five parishes and ten schools, QR codes for 54 parishes, text to give, and other giving opportunities.
- Offered continued support to parishes to maximize online giving use.
- Provided ongoing ParishSOFT technical support.
- Supported Parish Capital Campaign for the 40th Jubilee debt reduction program.
 - ✚ Our Lady of Refuge, San José
- Continued to engage Bishop Circle of Excellence members at in person events.

2021 ADA Statistics

Goal: \$5,894,755.00

Pledged: \$8,628,591.51

Pledged Over Goal: \$2,812,727.72

Actual Rebates Earned: \$2,023,700.42

of Pledges: 16,931

Average gift: \$509.63

Statistics as of June 30, 2021



Communications



The Communications team promotes and supports the mission of the Church and the work of our Bishop, our parishes, our schools, and chancery departments in proclaiming the Good News of Jesus Christ by using today's communications tools and technologies to inspire and invite people to encounter Jesus and connect with their local parishes and schools.

IMPACT

- The office launched the new *The Valley Catholic* print magazine and monthly eNews with a commemorative issue marking the 40th anniversary of the diocese. This new publication also has a new companion website, where readers can find evangelizing content that they can use and share with family and friends.
- To help streamline communications for parishes and schools, the office revamped our weekly chancery newsletter, known as the “eBulletin,” sent to more than 2,300 employees. This weekly roundup significantly cut down on email traffic to parishes and helped focus communication for parish leadership.
- The office expanded the diocese's social media presence on Facebook, Instagram, Twitter, and LinkedIn with new social media campaigns, more videos, livestreaming, and more, which led to a 100% increase in followers now numbering more than 18,000, a 500% increase in impressions and a 600% increase in engagement across all platforms.



Facilities, Insurance and Risk Management

This team provides professional expertise in construction management, property purchases and sales, facilities maintenance, and operations in support of the Bishop's goals for the Diocese. This office also manages the property, casualty, and workers' compensation programs for the diocese, parishes, and schools.



IMPACT

- Continued health and life safety inspections of school and parish facilities to reduce the number and severity of claims for trips and falls, property loss, and other claims.
- Developed maintenance plans and a reserve study for each diocesan school to identify maintenance, repair, and replacement items needed in the future.
- Developed COVID-19 trainings for all staff and volunteers to minimize potential spread of the virus.
- Helped facilitate mobile clinics at our parishes.
- Worked with the County and parishes on policies and procedures to keep clergy and lay employees safe in this pandemic and respond to COVID-19 reporting requirements.

Finance

The Finance team handles the financial analysis, budgeting and investments, and facilities and insurance needs throughout the diocese.



IMPACT

- Froze the pension to make it financially viable, reducing the unfunded pension liability by approximately \$30 million.
- Eliminated \$23 million in debt.
- Have made the deposit and loan profitable – reduced liabilities by \$5.5 million and distributed \$500k in matching funds to our neediest parishes/schools.
- Increased insurance reserves by approximately \$25 million.



Faith Formation

Following the call to bring people closer to Jesus, the Faith Formation team promotes lifelong formation for children and adults by providing retreats, catechetical certification, and courses on faith formation catechetical topics for the formation of ministers. The team also supports the faith formation ministers at our parishes, offering resources and tools while overseeing the implementation of Catholic faith formation policies for the Diocese of San José.

IMPACT

- The Catechetical Certification Program had 70 English- and 120 Spanish-speaking participants.
- Gathering the collaborative input and best practices from our parishes, the Diocese Office of Faith Formation developed and revised protocols for holding virtual faith formation and sacrament preparation classes during the pandemic.
- Virtual ongoing formation of Faith Formation Directors.
- Provided zoom accounts for all catechists across all parishes to minister to children and adults.
- Facilitated 3,841 baptisms, 2,693 confirmations, and 3,351 first communions.
- 140 Adults and 170 children from 50 parishes joined the Church at Easter.



Family Life



The Family Life team supports parish marriage and family life ministry, strengthens marriage preparation, forms and encourages parents, offers marriage enrichment, and promotes natural family planning.

IMPACT

- Held 13 marriage preparation classes (six in English and seven in Spanish) with over 250 couples in attendance.
- Held 29 natural family planning classes (22 in English and 7 in Spanish) with over 500 participants and 425 private follow-up sessions.
- Coordinated our Annual Wedding Anniversary Mass with 125 couples attending.



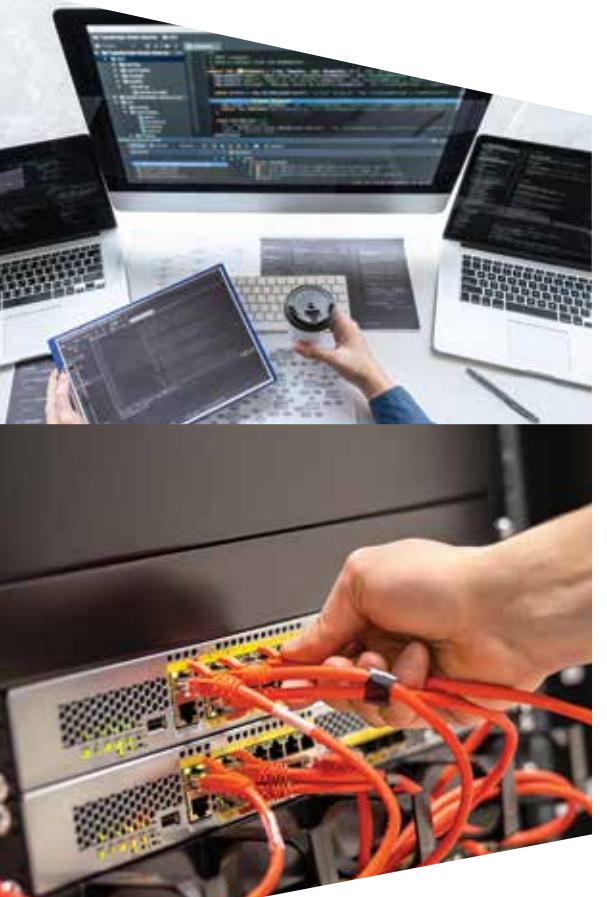
Human Resources

The Human Resources team supports the 2,500 employees as they bring the message of Christ to the people of Santa Clara County. The Office for the Protection of Children and Vulnerable Adults is within the Human Resources Department, which helps parishes and schools ensure that all employees and volunteers are trained to recognize and prevent sexual abuse of minors and vulnerable adults through our Safe Environment program.



IMPACT

- Helped parishes and schools navigate COVID policies, including telecommuting, COVID supplemental sick leave, leaves of absences, accommodations, travel requirements, exposure tracking and reporting, and vaccine certification and tracking.
- 859 Safe Environment Trainings completed.
- Held six workshops, training 40 chancery managers on integrating our mission, vision, values, building leadership capabilities, and developing people management skills.
- Held two employee health and well-being support sessions and EAP webinars.
- 171 new employees were onboarded/transitioned.
- 3,173 human resource employee transactions were completed.



Information Technology

The Information Technology team provides technology support to all 26 elementary schools, including on-site support to 14 schools. The team also provides full service to two cemeteries, and all chancery departments. In all, the team supports over 2,800 diocesan technology users.

IMPACT

- Responded to more than 20,000 ServiceDesk requests.
- Built out six complete networks at parish and school sites.
- Provided 100+ Zoom accounts for online ministry.
- Supported the Chancery and schools to shift from in-person to remote and distance-learning nearly overnight.



Institute for Leadership in Ministry

The Institute for Leadership in Ministry is a three-year course of studies that provides a foundation in Catholic theology, spirituality, education, and training in leadership for those who demonstrate the ability or the potential to serve as leaders in parishes.



IMPACT

- Moved the Institute of Leadership Ministry to an online format due to pandemic.
- Serving 135 students (62 in the English courses and 73 in the Spanish courses).
- Graduating 36 students in 2021.



Life Justice and Peace

This team promotes the dignity of the human person through education, advocacy, and prayer. The office offers opportunities for the faithful to grow in understanding of Catholic social teaching, affirm a consistent ethic of life from conception to natural death, and advocate for the common good through public policy.

IMPACT

• Held seminars and liturgies on Racial Justice, Respect Life and Laudate Sí

- † 400 attendees at World Day of Migrants and Refugee Mass and Rosary, virtual and in-person.
- † 500 attendees at Respect Life Month virtual rosary and speaker series.
- † 300 attendees at White Mass for Medical first responders, virtual and in-person.
- † 350 attendees at African American Heritage Mass and speaker event, virtual and in-person.
- † 300 attendees at Asian American Pacific Islander Month Mass and speaker event, virtual and in-person.
- † 200 attendees at Laudate Sí 6th Anniversary virtual speaker series.

• Restoration Justice

- † Ministered at three county jails, connected with two chaplains and 100 volunteers, serving 4,500 inmates in restoration of justice with weekly masses resuming this summer.
- † Celebrated Masses with Bishop at the men's and women's jails twice.
- † Ministered at two juvenile facilities with two chaplains and 20 volunteers, serving 200 youth.
- † Held street victim prayer services monthly for San Jose's murder victims at the site of each death.
- † Hosted the yearly Victims of Violence Mass celebrated by Bishop and attended by 50 people.
- † 128 lay ministers attended the California Catholic Restorative Justice Network, and 86 successfully completed the certificate series.



Liturgy



The Liturgy team prepares liturgies for the Bishop, provides liturgical formation for lay ministers in the diocese, assists parishes with liturgical matters, and coordinates the principal diocesan liturgical celebrations each year, including Rites of Election, Chrism Mass, and ordinations.



IMPACT

- With the onset of COVID-19, public Masses were suspended for the first time in more than 100 years on March 16, 2020. Nevertheless, Masses continued via livestream across the diocese.
- With the guidance and feedback of pastors, the chancery wrote and revised countless protocols for livestreaming Masses and celebrating in-person outdoor Masses and sacraments.
- To help parishes with all the changes imposed by the pandemic, liturgical adaptations to the sacraments were released and regularly updated as public health guidance changed.
- Bishop celebrated 20 episcopal liturgies, most of which were livestreamed.

Planning and Mission Effectiveness

The Central Administration of the diocese (Vicar General, Chief Operations Officer, General Counsel, and the Bishop's Cabinet) supports the Bishop's episcopal ministry of teaching, sanctifying, and governing by ensuring coordinated and effective service of the chancery to our parishes, schools, other related agencies, as well as local, regional, national, and international partners.

IMPACT

- Completed the assessment of the chancery to ensure the fundamental mission of the Church is at the heart of all diocesan ministry and to improve the support to parishes and schools that we are mission-driven and effective. As a result:
 - Unveiled the Chancery Mission, Vision, Values, and Mission Priorities focusing on serving each parish, school, and the broader Church to the best of our ability.
 - Developed 45 chancery priorities based on the feedback from the assessment and started implementing these recommendations, considering the pandemic and budget limitations.
 - Showed significant improvement in the satisfaction survey in December 2020, with our administrative departments receiving an average score of good or better for the level of responsiveness, collaboration, and communication with our parishes and schools.



Tribunal

The Tribunal handles the judicial matters of the Church, including processing marriage cases and providing canonical opinions to the Bishop, chancery departments, parishes, members of the faithful, and others who seek information about the Church's law, especially regarding the sacraments. The Tribunal works to clear obstacles for people who feel marginalized within the faith community.

IMPACT

- Accepted 77 petitions for administrative and judicial processes.
- Completed with Final Sentences in 88 cases.
- Held four workshops for 30 parish clergy and lay ministers.



Vicar for Clergy

The Office of the Vicar for Clergy provides meaningful formation and support for clergy and ensures loving care for retired priests. This office includes the five-year Deacon Formation program to prepare men for ordination as Permanent Deacons.

IMPACT

- Provided programs for the ongoing education and formation of the clergy through study week, day of recollection, annual retreat, sabbatical, and other learning opportunities such as skills or language proficiency.
- Supported several international priests navigating their adjustment of immigration status, from R-1 visas and permanent residency applications.
- Served 45 retired priests, mitigating health crises, and planning residential and future care needs.
- Processed permission for 83 visiting priests and deacons to celebrate sacramental ministry in the diocese.
- Hosted clergy study week for 118 priests in May 2021.
- Celebrated liturgies to advance five men to Candidacy, Instituted Lector and Instituted Acolyte – in the cathedral.



Vocations Office

The Vocations team helps individuals discern a vocation to ordained or vowed service to the Church, supports those exploring this call, provides training and education to those pursuing their vocations, and organizes retreats, resources, and events to promote and pray for vocations.



IMPACT

- Held five discernment retreats with a total of 58 attendees.
- Provided support and education to aid 8 seminarians.
- Ordained one permanent deacon and one priestly ordination.
- Held our Quo Vadis Discernment Retreat.





Youth and Young Adult Ministry

Youth Ministry ensures that Catholic youth (middle and high school ages) and young adults (ages 18-39) have the opportunity for evangelization and encounter with Christ through the sacraments, prayer, formation, ministry, and service. Our core team supports parish staff and volunteers working with youth and young adults with formation opportunities.

IMPACT

- Created a new safety criterion, code of conduct, and permission forms to support parishes with online youth programs during the pandemic.
- Held eight training sessions in the English and Hispanic communities for the youth and young adult ministers and leaders focused on pandemic support and the sharing of resources.
- Gathered 260 Youth & Young Adults in a weekly Lenten speaker series, Ashes to Glory, with presentations from priests, deacons, and seminarians from our diocese.
- Held virtual Lenten retreats at parishes throughout the diocese in English and Spanish for over 500 youth and young adults.
- Gathered 2000 youth and families at two Vietnamese Lenten Missions.
- Gathered 20 youth and their families in a virtual week-long service project that supported the poor and other communities.
- Held monthly Diocesan Youth Masses at parishes attended by over 250 youth each.
- Gathered 50 Youth & Young Adults and their families to celebrate the Graduating class of 2021 at a Mass celebrated by Bishop.
- Held regular advisory committee(s) for Youth & Young Adult leaders throughout the pandemic to support the needs and requests of the parish's diocesan Youth & Young Adult programs.



Financials for the Fiscal Year **2020**

The information contained in this report provides a financial overview of the Diocese of San José. Bishop Oscar Cantú is the spiritual leader of the Roman Catholic Diocese of San José. He is also the sole member of the Corporation of the Catholic Bishop of San José. The corporation is made up of several separate financial entities.

They include:

The Chancery

The program and administrative offices of the diocese, which is under the direct control of the bishop.

The Parishes

Including parish elementary schools, which are separate canonical units.



Parish Ordinary Income

Parishes in the Diocese of San José overall saw a decrease in collection income. From July 1, 2020, through June 30, 2021, ordinary income (Sunday and Holy Day collections) decreased by 14.6% to \$30.3 million.

ordinary income decreased by
-14.6%



Year	Parish Plate Income
16/17	\$34.3
17/18	\$34.8
18/19	\$35.6
19/20	\$35.5
20/21	\$30.3

Year	Deposits	Loans
17/18	\$87.4	\$24.0
18/19	\$80.3	\$22.3
19/20	\$79.6	\$19.9
20/21	\$87.7	\$17.0

Deposit and Loan

The Parish Deposit and Loan Fund is a separately maintained and audited savings and loan organization within the diocese created specifically for parishes and schools
FY19/20: \$17.0 Million

Net Liquidity

Net liquidity has had a general decline over the past five years, due to negative operating results and insurance program losses. Helping offset some of this decline has been strong financial performance from our investments.

Year	Debt
15/16	-\$21.5
16/17	-\$14.8
17/18	-\$21
18/19	-\$11.8
19/20	-\$12
20/21	-\$0.9

Net liquidity has had a general improvement over the past 5 years



All dollar numbers on this page are in millions. Audited financial statements are available on the diocese of San José website.



The Numbers*

The Roman Catholic Diocese of San José Consolidated
Statements of Activities Year Ended June 30, 2021

Revenue	Without Donor Restrictions	With Donor Restrictions	Total
Gifts, bequests, and collections	838,348	6,388,993	7,227,341
Fees	6,001,419	-	6,001,419
Diocesan assessment	4,708,013	-	4,708,013
Education income	1,235,229	-	1,235,229
Rental income	604,238	91,257	695,495
Investment income realized	3,203,464	1,988,932	5,192,396
Interest income from loans	1,227	-	1,227
Cemetery revenues	986	-	986
Insurance premium income	23,540,185	-	23,540,185
Newspaper assessment income	68,792	-	68,792
Grant income	-	3,029,955	3,029,955
Other income	12,607	-	12,607
Subtotal revenues from operations	40,214,508	11,499,137	51,713,645
Net assets reclassifications	720,886	(720,886)	-
Net assets released from restrictions	7,382,475	(7,382,475)	-
Total revenues	48,317,869	3,395,776	51,713,645

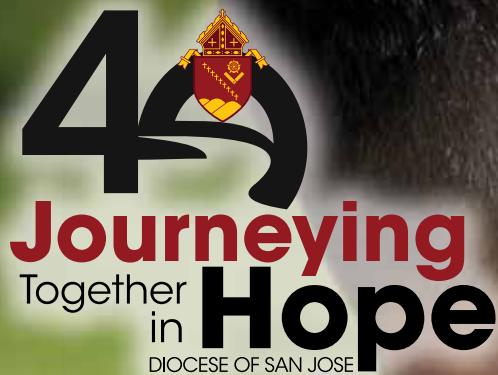
	Without Donor Restrictions	With Donor Restrictions	Total
Expenses			
Compensation and benefits	9,149,786	-	9,149,786
Operating expenses	6,535,741	-	6,535,741
Travel and events	107,129	-	107,129
Professional services	1,030,782	-	1,030,782
Insurance	25,019,698	-	25,019,698
Depreciation	1,281,580	-	1,281,580
Interest	112,426	-	112,426
Total expenses	43,237,142	-	43,237,142
Change in net assets from operations	5,080,727	3,395,776	8,476,503
Gain (loss) on disposition of assets	1,296,082	-	1,296,082
Bad debt expense	477,786	-	477,786
Change in obligations for post-retirement benefits	6,206,097	-	6,206,097
Investment income unrealized	7,272,860	5,071,166	12,344,026
Income Taxes	-	-	-
Change in net assets	20,333,552	8,466,942	28,800,494
Net assets, beginning of the year, prior to restatement	31,579,685	81,980,339	113,560,025
Cumulative effect of change in accounting principle	-	-	-
Adjusted net assets, beginning of the year, as restated	31,579,685	81,980,339	113,560,025
Net assets, end of the year	\$51,913,237		\$142,360,519

*These numbers have not been audited

All audited financial statements are available on the Diocese of San José website

*These numbers have not been audited

All audited financial statements are available on the Diocese of San José website



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