

The Catholic Community Foundation of Santa Clara County

Overview of grant process, including disbursements

As of 6/30/2014

	Grant Process	Fund	Type ⁽¹⁾	Grant Frequency	2010	2011	2012	2013	2014	Total
1	Grant Application by Diocesan Officer, Vicar General, or CEO of organization with quarterly funding to beneficiaries and annual report on usage of funds.	Catholic Charities	Direct Fund	Quarterly	\$ 1,699,574	\$ 635,896	\$ 492,215	\$ 111,495	\$ -	\$ 8,797,600
		Clergy Retirement	Direct Fund	Quarterly	\$ 403,272	171,096	88,273	66,040	-	\$ 2,190,800
		Diocesan Debt Reduction	Direct Fund	Quarterly	\$ 774,803	398,000	249,000	48,500	-	\$ 4,398,300
		Parish Sharing	Direct Fund	Quarterly	\$ 1,497,907	1,465,461	674,893	109,874	25,439	\$ 8,884,900
2	Grant Application submitted by Diocesan Department in charge of these programs with annual report on usage of funds. Grants are made in December.	Institute for Leadership in Ministry	Endowment	Annual	72,000	72,000	77,000	82,800	-	\$ 380,200
		Catholic Education Tuition Assistance	Endowment	Annual	173,000	146,000	149,000	160,700	-	\$ 929,700
		Youth Ministry Staff Recruitment/Training	Endowment	Annual	54,000	54,000	58,000	62,000	-	\$ 285,000
		Young Adult Ministry	Endowment	Annual	54,000	54,000	58,000	62,000	-	\$ 285,000
		Social Justice Education	Endowment	Annual	45,000	45,000	48,000	51,600	-	\$ 240,600
		Seminarian Training	Endowment	Annual	68,000	57,000	57,000	60,900	-	\$ 379,900
		Diaconate Training	Endowment	Annual	26,000	27,000	29,000	31,000	-	\$ 140,800
		Parish Repair and Refurbishment	Endowment	Annual	73,990	73,000	71,250	79,424	-	\$ 348,000
Cathedral Basilica of St. Joseph	Endowment	Annual	72,000	73,000	78,000	85,000	-	\$ 395,000		
3	Grant Application submitted by Parish, Diocesan Department, or program stating purpose/use of funds with annual report on usage of funds. Grants are made in June.	Apolonia Andre Fund for Liturgical Music	Endowment	Annual					3,200	\$ 3,200
		Pastoral Ministry Training*	Endowment	Annual	48,500	55,725	86,113*	86,000*	63,445*	377,000
		Parish Outreach	Endowment	Annual	48,500	59,000	59,000	61,000	86,200*	351,300
		Parish Stewardship	Endowment	Annual	40,500	49,000	47,629	50,900	50,567	269,700
4	All funds held by Foundation until decision on new parish.	Parish Acquisition and Construction	Fund	When necessary		3,030,000	800,000	-	-	3,830,000
					5,151,000	6,465,200	3,122,400	1,209,200	228,900	32,487,000

(1) Endowments derive an income from their invested balance. This income forms the basis for the Grants.
Direct Funded Grants receive 100% of the funds collected for that restriction in addition to Foundation Board designations.

All amounts are based on a calendar year.

Investment Portfolio -> **\$42 Million**

*Includes \$25,000 match from John M. Sobrato