

The Catholic Community Foundation of Santa Clara County

Overview of grant process, including disbursements

As of 12/31/2013

	Grant Process	Fund	Type ⁽¹⁾	Grant Frequency	2009	2010	2011	2012	2013	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	\$ 2,491,333	\$ 1,699,574	\$ 635,896	\$ 492,215	\$ 111,495	\$ 8,797,600
		Clergy Retirement	Direct Fund	Quarterly	876,265	\$ 403,272	171,096	88,273	66,040	2,190,800
		Diocesan Debt Reduction	Direct Fund	Quarterly	1,126,795	\$ 774,803	398,000	249,000	48,500	4,398,300
		Parish Sharing	Direct Fund	Quarterly	1,303,721	\$ 1,497,907	1,465,461	674,893	109,874	8,859,500
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	53,000	72,000	72,000	77,000	82,800	380,200
		Catholic Education Tuition Assistance	Endowment	Annual	181,000	173,000	146,000	149,000	160,700	929,700
		Youth Ministry Staff Recruitment/Training	Endowment	Annual	39,000	54,000	54,000	58,000	62,000	285,000
		Young Adult Ministry	Endowment	Annual	39,000	54,000	54,000	58,000	62,000	285,000
		Social Justice Education	Endowment	Annual	33,000	45,000	45,000	48,000	51,600	240,600
		Seminarian Training	Endowment	Annual	77,000	68,000	57,000	57,000	60,900	379,900
		Diaconate Training	Endowment	Annual	19,000	26,000	27,000	29,000	31,000	140,800
		Parish Repair and Refurbishment	Endowment	Annual	26,810	73,990	73,000	71,250	79,424	348,000
		Cathedral Basilica of St. Joseph	Endowment	Annual	87,000	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.	Pastoral Ministry Training*	Endowment	Annual	37,210	48,500	55,725	86,113*	86,000*	313,500
		Parish Outreach	Endowment	Annual	37,612	48,500	59,000	59,000	61,000	265,100
		Parish Stewardship	Endowment	Annual	31,105	40,500	49,000	47,629	50,900	219,100
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
					6,458,900	5,151,000	6,465,200	3,122,400	1,209,200	32,258,100

(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.

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

Investment Portfolio -> **\$41 Million**