

# The Catholic Community Foundation of Santa Clara County

## Overview of grant process, including disbursements

As of 12/31/16

					Grants for the last 5 years					
Grant Process	Fund	Type <sup>(1)</sup>	Grant Frequency	2012	2013	2014	2015	2016	Total <sup>(2)</sup>	
1	Subgroup of Designated Endowments whose grants are disbursed to the Diocese of San Jose for various departments.	Catholic Education Tuition Assistance	Endowment	Annual	149,000	160,700	187,300	191,900	187,900	\$ 1,496,800
		Diaconate Training	Endowment	Annual	29,000	31,000	36,100	37,100	36,300	\$ 250,300
		Institute for Leadership in Ministry	Endowment	Annual	77,000	82,800	96,300	98,900	96,800	\$ 672,200
		Parish Repair and Refurbishment	Endowment	Annual	71,250	79,424	97,300	100,000	97,800	\$ 643,100
		Seminarian Training	Endowment	Annual	57,000	60,900	71,600	72,900	76,800	\$ 601,200
		Social Justice Education	Endowment	Annual	48,000	51,600	60,000	61,600	60,300	\$ 422,500
		Youth Ministry Staff Recruitment/Training	Endowment	Annual	58,000	62,000	72,200	74,100	72,500	\$ 503,800
		Young Adult Ministry	Endowment	Annual	58,000	62,000	72,200	74,100	72,500	\$ 503,800
		---Subtotal for disbursed to the Diocese---	Endowment	Annual	547,250	590,424	693,000	710,600	700,900	\$ 5,093,700
	Designated Endowments: One-time, annual grant made to a specific organization or Diocesan department. Grants are made in December.	Cathedral Basilica of St. Joseph (Preservation)	Endowment	Annual	78,000	85,000	99,600	107,400	111,600	\$ 713,600
		Other desingated organizations	Endowment	Annual	-	-	212,300	222,500	233,100	\$ 667,900
		Separate parish endowments	Endowment	Annual	-	-	-	-	5,300	\$ 5,300
		St. Joseph the Builder	Endowment	Annual	-	-	-	1,600	2,900	\$ 4,500
2	Field of Interest Endowments: 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	5,000*	3,800	\$ 12,000
		Pastoral Ministry Training*	Endowment	Annual	86,113*	86,000*	63,445*	85,900*	80,750*	\$ 543,600
		Parish Outreach*	Endowment	Annual	59,000	61,000	86,200*	86,800*	77,850*	\$ 516,000
		Parish Stewardship	Endowment	Annual	47,629	50,900	50,567	59,900	61,500	\$ 391,100
3	All funds held by Foundation until decision on new parish.	Parish Acquisition and Construction	Fund	When necessary	800,000	-	-	-	1,185,000	\$ 5,015,000
4	Fund Holders make grant requests online or via signed PDF form.	Various Donor Advised Funds	Fund	When necessary	-	500	37,250	144,900	258,936	\$ 441,600
				<b>1,618,000</b>	<b>873,800</b>	<b>1,245,600</b>	<b>1,424,600</b>	<b>2,721,700</b>	<b>\$ 13,404,300</b>	

(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.

(2) Totals include all grants from Inception (2008). Some individual years hidden for space reasons.

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

Investment Portfolio -> **\$43 Million**

All amounts are based on a calendar year.