



THE CATHOLIC FOUNDATION

GLOSSARY

Beneficiary: In philanthropic terms, the grantee/ministry receiving funds from the Foundation is the beneficiary, although society and others may benefit as well.

Capacity Building: A grant to help nonprofit organizations carry out their missions more effectively such as proper staffing, equipment or other defined need.

Capital Support: Funds provided for construction, repair or major equipment that has a life value of more than a year.

Community Priorities/Pillars: The Catholic Foundation adopted the Diocesan Priorities of Parish Life, Catholic Education, Social Service and Vocations for funding in 2010.

Community Impact: The value and visibility of the work being done by our Catholic parishes, schools and ministries as a result of funding by the Foundation.

Discretionary/Unrestricted Funds: An endowment fund with no area of focus and a specific beneficiary has not been named. Funds may be directed by the Board of Trustees of The Catholic Foundation.

Donor Advised Funds: These funds have limited restrictions on the amount of spending in a year. Grants from these funds are recommended by the fund advisor(s) and ultimately approved by the Foundation. All grants must be made in alignment with Catholic teaching.

Endowment Funds: Designed to be administered in perpetuity with permanent restrictions on the amount of annual spending. The Catholic Foundation's Spending Policy currently specifies a maximum 5% spend from endowments based on a rolling 12 quarter average balance.

Field of Interest Funds: Endowment fund with a specific area of focus, but no named beneficiary.

Final Assessment: A review of the results of a grant, with the emphasis upon whether or not the grant achieved its desired objective. This assessment details the impact of the project on its community and how grant funds were used by the ministry. (Previously referred to as Final Report)

Fiscal Sponsor: An existing nonprofit organization affiliated with another organization for the purpose of the other organization receiving grants. Grantseekers may either apply for federal tax-exempt status or affiliate with a nonprofit sponsor.

Focus Funds: Endowments created by the Board of Trustees designed to support the four pillars and address ministries needs ineligible for The Challenge in Changing Times funds.

Fund Agreement: A contract between the Foundation and donor that stipulates that the gift must be held in perpetuity and invested to generate income to be spent for a specific purpose.

Funding Cycle: The chronological pattern of proposal review, decision-making and applicant notification of an award or denial.

General/Operating Support: A grant made to further the general purpose or work of an organization, rather than for a specific purpose or project.





THE CATHOLIC FOUNDATION

Grant Agreement: The contract of expectations between the Foundation and the grantee.
Guidelines: rules set forth by the Foundation that must be followed when applying for grants.

Impact / Outcomes: Refers to both quantitative and qualitative effects of grants, as reported by the grantee, to help inform future grantmaking decisions, leveraging cooperative funding, and increasing visibility of our Catholic faith in the community.

In-kind contribution: A contribution of equipment, supplies, time or other tangible resource, as distinguished from a monetary grant.

Interim Assessment: The evaluation of a grant project before its end.

Matching/Leverage Grant: A grant paid only if the grantee organization provides additional funding from other sources, often used to stimulate giving from others.

Mission Grant: A grant for simple capital or program-related needs less than \$10,000.

Pillars: Areas of diocesan funding priorities as adopted by the Foundation in 2010.

Program-Related Investment (PRI): A loan or other investment (as distinguished from a grant) made by a foundation to another organization for a project related to the foundation's philanthropic interests.

Purpose Grant: A grant for investments in program or capital needs between \$10,000–25,000.

Qualitative Data: Information is varied in nature and includes anything that can be captured that is not numerical such as direct observation, written documents or interviews. (e.g. The participating young adults had a prayerful experience.)

Quantitative Data: Information about quantities, information that can be measured and written down with numbers. (e.g. 35 young adults participated in the workshop.)

Qualitative vs. Quantitative: When measuring a quantity, a statement is made about quantitative data. When describing qualities, a statement is made about qualitative data.

Restricted / Semi-Restricted: Used to describe permanent restrictions on the purpose of a fund's use, the amount of spending, and/or the fund's beneficiary as identified by the founder in the fund agreement.

Seed money: A grant or contribution used to start a new project or organization. Seed grants may cover salaries and other operating expenses of a new project.

Site Visit: Visiting an organization at its location or area of operation and/or meeting with its staff or directors or with recipients of its services for grant-related information.

Sustainability: This term is used to describe a project that creates and/or maintains the conditions under which the resources needed permit fulfilling the social, economic and other requirements of present and future generations.

The Challenge in Changing Times Funds: A capital campaign conducted in 1999 produced these endowment funds. Four of the funds are restricted in purpose for the support of parishes, their elementary schools and their ministries.

Vision Grant: Capital and program grants for projects over \$25,000 with a sustainability plan.





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SHORT ANSWER EXAMPLES

Social Service/Goold Capital Improvement Examples

Please describe in a sentence or two how this need is affecting the community's faith and life.
(Our ability to track our clients and their needs is poor. Because we don't have adequate technology, our clients wait long periods to meet with us and their needs to be assessed....)

Please describe the project's purpose and objectives and in measurable, achievable terms.
(We believe replacing our current computers and purchasing two additional computers will allow us to better track the 400 people we serve monthly and see 15% additional clients because ...)

What is your plan for financing this project?
(We saved \$XX from signature event, and we are seeking funding from the XYZ foundation in the amount of \$XX. We will have to take a loan to buy all that or needed or buy half of what is planned...)

Please discuss the expected results from this project.
(By replacing the computers and adding better software, our clients will experience less wait for the help they need with rent assistance, utility bills or lack of food. We expect to see a 15% increase in client meetings and...)

Church and School Program Application

Please describe in a sentence or two how this need is affecting the community's faith life.
(Attendance is declining at Mass overall and is inconsistent at best, causing parishioners to be away from community and Eucharist.)

Please describe the project's purpose and objectives in measurable, achievable terms.
(We believe offering small church communities will help our parish in multiple ways. Mass counts and collections have been down by an average 15%. While our PSR registry has remained consistent we know adults are not participating, and with lower collections, this causes financial hardship on the parish...)

What is your plan for financing this project?
(We saved \$XX from our parish festival to put toward the purchase of the materials, and other donors have committed \$XX for the training of the facilitators. We will use this grant for the purchase of ...)

Please discuss the expected results from this project.
(By offering small church communities for adult faith formation, we believe consistent Mass attendance will increase, along with collections and that our parishioners will become more involved in parish ministries, causing an overall positive for our parish.)





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SHORT ANSWER EXAMPLES

Vocation Program Application

Please describe in a sentence or two how this need is affecting the community's faith and life.
(Catholics marrying in the church has declined 34% in the last 20 years. This keeps them away from the sacraments, Eucharist, and the parish community.)

Please describe the project's purpose and objectives in measurable, achievable terms.
(We want to help bring more couples to marriage in the church, and we estimate that there 500 young adults in our community who can help promote this plan. We are seeking funding to collaborate with the 30 members of the Young Adult group to promote the sacrament of marriage through....)

What is your plan for financing this project?
(We budgeted \$XX for marketing and the purchase of food, and found donors to commit to those costs. We estimate \$XX is needed for the program materials and our fundraiser brought in \$XX. We are seeking \$XX for the remainder....)

Please discuss the expected results from this project.
(We expect that 25 of the active YA members plus 10% of the known others in the targeted population will attend and evangelize to others about the importance of the sacrament of marriage....)

