

Joseph E. Weston Public Foundation 2017 Matching Grant Program

	CEEF/Endowment	Tuition Assistance
Purpose	Grow school endowment principal.	Provide tuition assistance currently for students with financial need.
Eligibility	<p>Selected Archdiocesan elementary schools. Must have a CEEF investment account at US Bank and funds must be deposited into the CEEF account. No exceptions.</p> <p><i>Non Archdiocesan schools approved by Mr. Weston must have an eligible endowment account.</i></p>	Selected Catholic schools. Funds may be deposited into any school bank account.
Potential Match Amount	CEEF - \$20,000 Non Archdiocesan Schools- \$20,000*	\$15,000**
Dates Donations Deposited	10/5/16 – 9/15/17	10/5/16 – 9/15/17
Donor Contributions Eligible for Match	Contributions to the CEEF account can be given by anyone, including the parish and/or school itself.	Goal is to encourage new donors to your school. Contributions from a parent/guardian of a current student or from parish, school, or Archdiocesan support are not eligible for the match.
Use of Funds (Restrictions)	The Weston match funds as well as the funds used to obtain the match are permanently endowed/permanently restricted funds and cannot be used. Only the earnings can be used and are to be used to maintain tuition costs at reasonable levels.	The Weston match funds (as well as the funds used to obtain the match) may be used currently, but are temporarily restricted and may only be used for tuition assistance.
Documentation to be Submitted to Office of Stewardship & Development	<p>Submit copies of all checks deposited to the US Bank CEEF investment account during September 2016. To track deposits made October through August, we use the US Bank CEEF investment monthly statements (no info is needed from the school for these).</p> <p>*Complete online form (website below)</p> <p><i>*Non-Archdiocesan/Non CEEF schools, please provide copy of donor checks or credit card transactions (with account info blacked out) or a detailed general ledger account printout for deposits to your school's endowment account. (Detailed general ledger printout is preferred.) Please include a statement acknowledging that the principal will not be spent.</i></p>	<p>The following are required and must be submitted:</p> <ol style="list-style-type: none"> 1. Letter from school certifying the donors are not parents/guardians and that the funds will be used for tuition assistance 2. List of contributors' names and amounts donated. Include copy of donor checks or credit card transactions (with account info blacked out) or a detailed general ledger account printout including donor names and amounts. (Detailed general ledger printout is preferred.) 3. Completed form on the Office of Stewardship & Development website available now. (See in red below)
Date Documentation Due in the Resource Development Office	Friday, Sept 15, 2017 – no exceptions	Friday, Sept 15, 2017 – no exceptions
<p>Send reports/inquiries to: Office of Stewardship and Development 2838 E. Burnside St, Portland, OR 97214 Email: sulrich@archdpdx.org ; phone: 503-233-8312; fax: 503-235-6675 OSD.ARCHDPDX.ORG (Go to Schools tab for online forms) <i>*Please refer to letter from Mr. Weston dated 5-3-17</i> **Some schools vary, please contact the Office of Stewardship & Development for more information.</p>		