

Catholic Campaign for Human Development Application Evaluation and Site Visit Guide






Contents

- I. [Overview](#)
- II. [The Site Visit](#)
- III. [Finalizing your Evaluation and Recommendation](#)
- IV. Attachments
 - (1) [Checklist of Critical Evaluation Points](#)
 - (2) [Key CCHD Definitions](#)
 - (3) [EDI Plan Review Considerations](#)
 - (4) [Diocesan Director Evaluation Form - Community Development](#)
 - (5) [Diocesan Director Evaluation Form - Economic Development](#)
 - (6) [Bishop Approval Form - Single Diocese](#)
 - (7) [Bishop Approval Form - Multiple Dioceses](#)

I. Overview

Purpose:

This guide is intended to serve as an informative tool for use by CCHD Diocesan Directors and local committees as they evaluate CCHD grant applicants during the national grant cycle. It includes:

-  suggestions for preparing for and conducting site visits
-  copies of the online evaluation forms that can be shared with local committee members
-  recommendations for reviewing an EDI plan
-  forms to use when obtaining the Bishop's approval of a pending application
- 

Please Note:

CCHD asks that diocesan directors, at a minimum:

- ❖ complete the Diocesan Director Evaluation Form online
- ❖ obtain and submit the written approval of the (arch)diocesan Bishop

We strongly encourage diocesan directors to conduct site visits with their local committee members.

For more information on the online evaluation process, visit www.cchdeval.org

rev. 12/19/11

II. The Site Visit

Who: Diocesan Director and/ or team of local committee members who will be conducting the visit

1. Setting up the Site Visit

- Set the Date, Time, Duration and Location
 - Contact the applicant two to three weeks in advance to set the date. Offer them a couple of dates that work for you and your committee members.

- Keep in mind that many of the leaders may work during the day. Often times, the best times for them are during the evening.
- Agree upon the length of the visit. Respect the time of the group's leaders and staff, of your local committee as well as your own. Usually an hour and half is plenty of time!
- Discuss expectations for the site visit. (See #3)
- Specify the location. Usually, it is preferable to meet at the organization's office or meeting space. A parish or café may also work. Establishing a relaxed and collegial atmosphere is helpful.
- *Special Note: Multi-Diocesan Applications* - All relevant dioceses receive and read the multi-diocesan application. The primary diocese is that diocese where the applicant is headquartered and/or has its principal activities and membership. Secondary dioceses are those dioceses where the applicant is active on a smaller scale. The diocesan director for the primary diocese plans and coordinates the site visit. If the secondary dioceses would like to participate in a site visit, they should coordinate that visit with the primary diocese. It is possible that a diocesan director may meet with leaders/staff located in the secondary diocese. A secondary diocese may also choose to call the applicant organization to discuss the application over the phone.
- Identify the Participants
 - Identify with whom you would like to meet. Ideally, the site visit will include at least two low-income members, a board member and the director of the organization.
 - Let the group know who from the diocese and/or local committee will be participating in the site visit.

2. Preparing for the Visit

- Reviewing the Application Prior to the Visit
 - Review the national grants staff evaluation prior to the visit for questions or concerns that you may be able to address during the visit. National grants staff is available to answer any questions or concerns at any time throughout the process.
 - Look critically at key information within the application. Consult the [Checklist of Critical Evaluation Points](#) (See Attachment 1) as you review the application. You may also find the [Key Definitions](#) (See Attachment 2) helpful. If you are evaluating a first year Economic Development Application, refer to [EDI Plan Review Considerations](#) (See Attachment 4).
 - Identify areas that require clarification or are missing key information
- Preparing Your Site Visit Questions
 - Based on your review of the application and that of the national staff, identify the key questions you have for the organization. Remember that you will have limited time.
 - Develop open-ended questions that will allow the leaders to respond and share their experience. Include questions that allow them to tell the story of their successes and challenges from their perspective. Examples include:
 - *Leadership development*
 - From your participation in this organization, what have you learned about yourselves? (question for leaders)
 - What type of training have leaders received? (for staff and leaders-searching for skills that have been taught)

- *Organizational development*
 - What roles do members and leaders play in helping to build the organizational capacity, power, or public image in the community? (for leaders)
 - For Community Development applications – Is your membership growing? Do you have a plan for increasing your organizational membership? (for staff and leaders)
- *Institutional change*
 - What issue campaign accomplishment are you most proud of to date? (for leaders)
 - If group has no issue accomplishments, ask, how is your current organizational work positioning the group to address issues in the next 12 months? (for staff and leaders)
- *Financial Capacity*
 - What roles do staff, board members, or leaders play in raising money to build the organization? (for staff and/or leaders)
 - How would you describe the financial health of your organization? What are some successes and challenges?
- Determine who will be responsible to ask the group the various questions.

3. Conducting the Site Visit

- Begin with Brief Introductions
 - Share who you are and how your role with CCHD and the local diocese.
 - Ensure that all the organization’s staff and leaders introduce themselves.
- Share information about the CCHD and the social mission of the Church
 - Use the opportunity to share with the group, why Catholics support this work and that funds come from a second collection taken up in parishes annually. Emphasize the principles of Catholic social and moral teaching in your communications. When CCHD speaks of “Catholic social and moral teaching,” it refers not to separate requirements, but to a consistent moral framework and common ethical principles, which begin with respect for the life and dignity of every person and include defense of the essential role of marriage and family life, the pursuit of social and economic justice and the search for the common good and genuine peace.
 - If you feel it's relevant to the organization's proposed activities, advise them that CCHD's criteria do not permit funded organizations to engage in partisan politics or in any activities that are contrary to the moral teachings of the Catholic Church. And be clear about the positions, activities and relationships not permitted by CCHD, (e.g. advocacy of abortion, same sex marriage, euthanasia, racism, as well as use of the death penalty and punitive measures toward immigrants).
 - Applicant organizations frequently have questions about their chances for funding or when decisions will be made. Walk them through the process and timing. Funding determinations are finalized by CCHD’s Subcommittee of Bishops in mid-June each year.
- Listen to and Engage the Leaders
 - Begin with some of your more open-ended questions. Allow leaders to tell their story. Often times, they have prepared something to share.
 - Save more specific questions until mid-way through the visit. Try not to read your questions like a quiz. Keep it conversational, but try to cover all the areas of question or concern.

- Be aware of who is talking during the visit and their level of comfort responding to questions. Do the leaders appear confident or are they dependent upon the staff? Does the staff dominate the conversation?
- Allow time for the organization's leaders and staff to ask questions.

4. Reflect on the Site Visit

- Be objective.
 - Use your experience and the information gathered during the site visit to reflect as a group on the critical evaluation points.
 - Discern how well prepared the organization appears to be at this point in time. Remember that CCHD funds organizations at various levels of development.

III. Finalizing your Evaluation and Recommendation

1. Complete the Diocesan Evaluation Form

- If local committee members are assisting with the completion of the evaluation, the Diocesan Director may provide them with a copy of the online evaluation form (See Attachments [4](#) and [5](#)) in hard copy or as a Word document. The Diocesan Director can later cut and paste their responses into the online form for submission.

2. Prioritizing Your Diocesan Requests

- The demand for CCHD funds, which far exceeds our supply of funds, coupled with our efforts to be good stewards of CCHD resources mean that a thorough evaluation of an application may not be enough.
- For dioceses with more than one application, it is sometimes helpful if the Diocesan Director with the input of the local committee provide the grants staff with a ranking of diocesan priorities for funding.
- Once the site visits and applicant evaluations are complete, agreement should be reached on the priorities for funding for that grant cycle.

3. Obtain the Bishop's approval

- Once the Community Development and/or Economic Development Implementation Grant online evaluation is complete, print it out to be attached to the Bishop's approval form (See Attachments [7](#) and [8](#)).

Attachment No. 1: Checklist of Critical Evaluation Points Community Development

- Priority for the Poor/Beneficiaries:
 - √ Are at least 50% of the beneficiaries low-income? You might also wish to reference the [Review and Renewal](#) of CCHD.
 - √ Review the data provided in the *Priority for the Poor* section of the application
 - √ What percentage of the board or governing body is comprised of poor and low-income people?
 - √ Cross-check these numbers with the Board Profile Sheets
 - √ If 50% of the board is not made up of people living in poverty, is it clear that poor and low-income people have a major role in decision-making? How is the board accountable to the organization's members/beneficiaries?
 - √ Does the board reflect the ethnic diversity of the organization's membership?
 - √ In addition to the board of directors, is there a description of how low-income people participate and make decisions?

- Institutional Change: *Does the applicant plan to address the root causes of poverty by changing policies and/or laws or establishing alternative structures and/or the redistribution of decision-making powers?*
 - √ Does the organization have clear and realistic goals for achieving institutional change?
 - √ Is it clear that the issues they are working to resolve emerged from the organization's membership?
 - √ Would the proposed institutional change aim at the root cause of the issue as opposed to providing a fast, emergency solution?
 - √ Does their strategy for achieving institutional change involve building a constituency through the development of leaders, mobilization of their members, and development of relationships with key partner institutions or officials?
 - √ Will the proposed change benefit people living in poverty?
 - √ Will it benefit large numbers of people as opposed to just a few?
 - √ Does the organization have a track record for creating institution change? Do they include concrete examples?
 - √ For refund applications: have they made reasonable progress on their previous year's goals?

- Leadership Development: *Does the applicant demonstrate a strong track record and commitment to the ongoing development of leaders within the organization*
 - √ Is the organization's methodology or process for training leaders clear?
 - √ How frequently do they hold trainings for leaders?
 - √ What's the average attendance for trainings?
 - √ What percentage of leaders being trained is new to the organization?
 - √ Is there a process to recruit and train new leaders in an ongoing manner?
 - √ What percentage is low-income? How is poverty measured?
 - √ Are members receiving the skills necessary to think strategically, carry out power analysis in their community and develop plans of action?

- √ For refund applications: have they made reasonable and measurable progress on their previous year's goals?
- Organizational Development: *Does the applicant have a plan to build the organization's capacity to achieve its goals by developing its membership base and providing adequate staffing and technical assistance?*
 - √ Does the organization have a long-term vision to create long-term, systemic or institutional change?
 - √ Does the organization have a clear strategy for the recruitment of new members?
 - √ How many people did the organization turn out at its most recent action or event?
 - √ Is evaluation a regular part of the group's process?
 - √ Are the proposed organizational development and membership recruitment goals realistic? Will they help the organization to achieve institutional change?
 - √ Is the organizational staffing adequate to achieve their goals?
 - √ For refund applications: have they made reasonable progress on their previous year's goals?
- Staff Capacity: *Does the applicant have trained and experienced staff and support?*
 - √ What is the experience of current staff?
 - √ Has the organization experienced staffing changes or turnover recently? If so, is an explanation provided?
 - √ Who provides technical assistance or training to the organization?
 - √ What kinds of services or assistance to they provide?
 - √ How long have they worked with the technical assistance provider or trainer?
- Fundraising and Financial Capacity:
 - √ Does the organization have a variety of financial sources? Is there evidence of a fund raising plan?
 - √ What percentage of the organization's funding is from dues or grassroots fundraisers?
 - √ How do members participate in fundraising?
 - √ How are members involved in the budget process?
 - √ Do members have ownership of the budget, financial statements and fundraising of the organization?
 - √ For refund applications: have they made reasonable progress on their previous year's goals?

Attachment No. 2: Key CCHD Definitions

What does CCHD mean by Priority for the Poor? - For the purposes of CCHD funding, the participation of poor people in the shaping and ongoing direction of organizations is a central criterion. While "advisory" groups may also strengthen an organization, poor and low income people must have and maintain a strong voice in the organization's leadership both in terms of its governance structure and policy decisions, especially through their direct participation in the board of directors.

Priority for the Poor also involves "ownership" of the processes within an organization and understanding of the community issues. Therefore, it is expected that at least 50 percent of the decision-making group or body for the organization be comprised of low-income persons. Members of the organization who come from the local community and/or geographical area being empowered should also be included. As a result of the CCHD Review and Renewal, the involvement of Catholic institutions and/or parishes will also be a plus in considering applications.

How does CCHD define Institutional Change? - CCHD's mission "is to address the root causes of poverty in the U.S." In Catholic Social Teaching, the causes of poverty are understood to be an aspect of "social sin" rooted in social and economic structures and institutions. CCHD considers "institutional change" as that which addresses policies and operational structures of government, corporations, or private agencies that create poverty, keep people poor or impose injustice on poor people.

The following actions frequently are interpreted as "institutional change" but *do not* fit CCHD's definition of "institutional change:"

- * Advocacy for an individual or many individuals resulting in a more just situation for the individual(s) but not changing the structure or official policy of the institution;
- * Changes in attitudes of persons who provide services to poor people, but not affecting the government, corporate or agency policies and structures.

How does CCHD define Leadership Development? - CCHD considers the initial and continual development of leaders to be a central component of their grant-making. Applicant organizations should demonstrate a strong track record and commitment to the ongoing development of leaders within the organization. Plans for training may include topics such as: social analysis, issue identification, elements of organizing, fundraising, board development, etc.

How does CCHD define Organizational Development? - CCHD evaluates organizational development plans by assessing the capacity and track record of the applicant organization. Organizations applying for funding should demonstrate some experience and history related to the activities proposed for implementation. An organization may have an excellent track record in providing direct services to a very low-income community, but this alone would not qualify to be effective at creating institutional changes. In addition to having a proven record of affecting institutional change, the applicant organization should demonstrate capacity in terms of its ability to raise and manage funds, the experience and involvement of its board members, collaboration with other institutions, and ability to grow its membership.

What does CCHD mean by the word “Action?” – An “action” is an organized public meeting or activity where a community organization puts forward a plan, a set of demands, or other information before public or private sector officials whose support for their position on a particular issues or issues they seek. Actions may be small (25-35 people) or large (2,000+ people) but they are always an opportunity for the community group to mobilize their membership to directly and actively participate in public dialogue and often negotiations around the issues which they put forward.

What does CCHD mean by Economic Development Institution? – CCHD’s economic development program focus is on Economic Development Institutions (EDIs). EDIs typically are organizations, businesses and real estate projects that are structured for lasting community ownership and low-income control. They create good jobs and just workplaces, and they develop assets for low-income people that are owned by families and communities.

What outcomes does CCHD anticipate from economic development funding? – CCHD has established the following threshold outcomes to ensure that EDIs have the potential for substantial job creation and/or asset development within their communities:

- EDIs must create 10 or more new jobs that pay a living wage with benefits as determined by regional standards, and/or
- EDIs must develop asset ownership for more than 10 individuals or families while also benefiting the larger community.

CCHD’s Economic Development Implementation Grant applicants are required to submit a complete plan for the EDI. That plan must clearly relate the anticipated outcomes to a rigorous assessment and analysis of the community. In some underserved or distressed areas of the country (e.g. some rural and reservation communities), threshold outcomes may be given special consideration as determined by regional standards. That being said, any application that is incomplete or that has not submitted all required materials as instructed will be declined immediately.

Attachment No. 3: EDI Plan Review Considerations

Assessment and Analysis

Consider the assessment and analysis of pertinent community needs, resources and regional economic conditions that provide a basis for the EDI's strategic direction(s). Look for:

- A description of the EDI's specific purpose that is linked to a broader understanding of its particular field/industry and political environment.
- A market analysis within a specified geographic area that establishes both (1) the need(s) and (2) the competitive challenges for the EDI.
- An assessment that identifies sufficient financial resources and institutional relationships to start-up and operate the EDI in its early years.

Strategy, Structure and Finances

Consider the strategy for EDI start-up and operations for three to five years. Look for:

- A timeline/schedule for start-up that links specific steps to who is responsible and what resources are required.
- A complete description of day to day operations
- Clear descriptions and benchmarks for job creation and/or asset development

Consider the EDI's structure, look for:

- An organizational structure that promotes opportunity and solidarity.
- A legal structure that provides asset ownership to both low-income individuals/families and the larger community.

Consider the EDI's finances, look for:

- Current financial stability (for existing applicants) as reflected in financial statements, interim reporting, matching fund commitments and current net worth.
- Budget line items that is consistent with current financial position and the EDI strategy for growth.
- A financial operating strategy for the next three to five years that is consistent with the EDI budget and strategy for growth.

Leadership Development and Low-Income Control

Consider the EDI's board, management and workforce, look for:

- A commitment and strategy for ongoing leadership development that meets CCHD low income control criterion.
- For job creation, a job ladder, training opportunities and a democratic workplace.
- Budget line items to cover the costs of recruitment, training and formation

Attachment #4: **Community Development Evaluation Form**

**Note: This is a copy of the online evaluation form. It may be used with local committees who assist with the evaluation of grant applications. The final, completed evaluation form must be submitted through Reviewer Connect by the CCH Diocesan Director or authorized CCHD Contact.*

| | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|-----------------------------------|----------------------------------|
| Organization Name | | | |
| Request Amount | | | |
| Support (mark one) | Strong <input type="checkbox"/> | Moderate <input type="checkbox"/> | No Fund <input type="checkbox"/> |
| Suggested Amount | | | |
| PRIORITY FOR THE POOR & ORGANIZATIONAL MEMBERSHIP | | | |
| <p>At least 50% of the organization's beneficiaries must be people living in poverty. Also, those living in poverty must have the dominant voice in the organization.</p> <ul style="list-style-type: none"> • One way of measuring whether people living in poverty have the dominant voice in the organization is for at least 50% of those who plan, implement and make policy for the project be living in poverty. What percentage of those who plan, implement and make policy for the organization are people living in poverty? • If less than 50% what other structures and processes are in place to ensure that poor people have a dominant voice in the organization? • How is the board accountable to organizational members? • How are low-income people involved in the organization's decision-making processes? • How does the organization prepare low-income people to take leadership positions within the organization? • If the applicant does not demonstrate priority for the poor in its decision-making at this time, do they have a realistic plan and timeline to achieve this goal? • If this is also an Interim Report does the organization demonstrate sufficient progress in this area? | | | |
| INSTITUTIONAL CHANGE | | | |
| <p>CCHD defines institutional change as: (a) a modification of existing laws and/or policies; (b) establishment of alternative structures and /or redistribution of decision-making powers;</p> <ul style="list-style-type: none"> • Does the organization understand CCHD's definition of institutional change? What concrete change in laws, policies, or establishment of alternative structure is the organization proposing? • Are the institutional change goals and activities timeline realistic given the organization's capacity (number of leaders, size of constituency, and experience of staff)? • What specific change(s) has led to the reduction and/or alleviation of poverty? • Does the group have a recent track record of success in achieving institutional change? • If the application includes an Interim Report does the Interim Report demonstrate sufficient progress in meeting the applicant's stated goals for institutional change? | | | |
| LEADERSHIP DEVELOPMENT | | | |
| <p>Ongoing leadership development is considered essential in CCHD's criteria. Skills trainings, social analysis, issue identification, elements of organizing, fundraising, board development, etc. are important facets of leadership development.</p> <ul style="list-style-type: none"> • What percentage of the leadership is low-income? • Is there an ongoing process to recruit and train new leaders? What percentage of leaders is new to the organization? • If the application includes an Interim Report does the Interim Report show progress in meeting the groups' leadership development goals? | | | |
| ORGANIZATIONAL DEVELOPMENT | | | |
| <p>Organizations applying for funding must demonstrate the ability to achieve the goals outlined in the proposal. This can be established by documenting an organization's track record in creating institutional change and leadership development.</p> <ul style="list-style-type: none"> • Does the applicant organization have a strong and functioning board? • Is there a system in place that ensures that the board acts on the wishes of the organization's members? • Does the organization have a clear way of identifying and keeping their membership involved? • Does the applicant organization have sufficient staff and trained leaders and a realistic timeline to effectively carry out its goals and objectives? | | | |

- If technical assistance providers are to be used, are their credentials included and is a scope of work and budget provided in the application?
- If the application includes an Interim Report does the Interim Report demonstrate sufficient progress in achieving stated goals?

FINANCIAL CAPACITY

The ability to develop financial capacity is demonstrated by internal and external fundraising. Organizations should demonstrate to CCHD that they have been able to raise funds, and that they have current and future plans for increased support of their organization during and after CCHD funding.

- Does the organization have a stable and diverse base of financial support as demonstrated by funding levels and types?
- Has the organization provided a realistic plan that involves low-income leaders in budget decisions and fundraising?
- Do the financial records included with the application indicate that the organization manages its funds well?
- If the application includes an Interim Report does the Interim Report demonstrate sufficient progress in this area?

CATHOLIC MORAL AND SOCIAL TEACHING

- Has the DD had a conversation with the group about Catholic Moral and Social Teaching?
- Does the organization understand the types of activities that would be in contradiction of Catholic Moral and Social Teaching? Are the group's activities in conformity with Catholic Teaching?
- Is there a specific Catholic social teaching principle which the applicant animates (Life & Dignity of the Human Person, Call to Family, Community and Participation, Rights & Responsibilities, Option for the Poor, Dignity of Work and the Rights of Workers, Solidarity or Care for God's Creation)? If so, which ones?

USCCB PRIORITIES

- How does the group's work advance the USCCB priorities of 1) affirming the intrinsic value of human life and the dignity of every human being, 2) promoting understanding and acceptance of cultural diversity or 3) strengthening marriage and family Life?

CATHOLIC PARTICIPATION

- How have or how do Catholics participate in the organization?
- Why is it a priority for the local diocese for CCHD to fund this request?

NONPARTISAN ACTIVITY

- Is the applicant engaged in partisan political activity that makes it not eligible for funding?

SUGGESTED FOLLOW-UP QUESTIONS OR POINTS NEEDING CLARIFICATION

ADDITIONAL COMMENTS

CCHD welcomes any additional information, recommendations, insights and comments from the Diocesan Director and/or their local evaluation committee.

RECOMMENDED GRANT CONDITIONS

A group may be recommended for funding with conditions, meaning that a group may be recommended for funding so long as it meets certain requirements as determined by CCHD Diocesan Director and National Staff.

Attachment #5: CCHD Economic Development Evaluation Form

**Note: This is a copy of the online evaluation form. It may be used by local committee members who assist with the Evaluation of grant applications. The final, completed evaluation form must be submitted through Reviewer Connect by the authorized CCHD Diocesan Director or CCHD Diocesan Contact.*

| | | | |
|-----------------------------|---------------------------------|-----------------------------------|----------------------------------|
| Reviewer Name | | | |
| Organization Name | | | |
| Request Amount | | | |
| Support (select one) | Strong <input type="checkbox"/> | Moderate <input type="checkbox"/> | No Fund <input type="checkbox"/> |
| Suggested Amount | | | |

OVERALL ORGANIZATIONAL DESCRIPTION OF APPLICANT

Applicants are often doing more projects than just the EDI they are applying for.

- Give a brief overview of the entire organization and the various work areas in which it is involved.

EDI JOB CREATION AND/OR ASSET DEVELOPMENT

Applicants should be (or sponsor) an Economic Development Institution (EDI) that will create ten or more good jobs for low-income individuals/families and/or develop assets owned by the larger community.

- Does the application focus on the development of an Economic Development Institution (EDI) that will create living wage jobs?
- Does the EDI create other community-held assets and, if so, what are those community-held assets?
- If the application includes an Interim Report, does the Interim Report demonstrate sufficient progress on the asset development and job creation goals?

EDI ORGANIZATIONAL DEVELOPMENT

Applicants should describe an organizational development strategy that is well-matched to their job and asset creation goals. Organizational Development refers to the internal structural and operational strengths that ensure the capacity to perform and deliver as planned.

- Consider or describe:
 - 1) the skills and capacity EDI team (staff, consultants, board, and institutional partners),
 - 2) the strength of its organizational systems and planning efforts (the thinking, the technology, the information management),
 - 3) the EDI's income and expenses, and
 - 4) the applicant's track record with this or similar projects.
- If the application includes an Interim Report, how has the applicant progressed in each of its organizational development goals?

EDI FINANCIAL CAPACITY

Matching funds are required in order to receive CCHD Economic Development grants. Applicants should also describe a reasonable and well thought out strategy to provide sufficient income for the EDI for the next three to five years.

- Are cash (not in-kind) matching funds committed that are at least equal to the funding request?
- Does the applicant demonstrate that it has the financial capacity, now and in the next few years, to be successful with its EDI?
- If the application includes an Interim Report, how has the applicant progressed in achieving its fundraising goals?

LOW INCOME CONTROL AND LEADERSHIP DEVELOPMENT

At least 1/3 of those who plan, implement and make policy for the applicant must be low-income.

- Do low income members have a strong voice in the leadership of the applicant organization?
- Does the board of the EDI board really make decision for the EDI or does the board of the entire organization (if there is one) make decisions?
- If there is an organizational board over the EDI board, how do they relate to each other?
- Is a strategy for ongoing training and leadership development of the EDI board described?
- If the application includes an Interim Report, does the Interim Report demonstrate sufficient progress on their stated leadership development goals?

EDI PLAN

All applications are required to submit a complete business plan that fully addresses the following questions. If a business plan is not attached, is not adequate or complete, this would be considered an incomplete application and grounds for declination.

- Does the application include a complete and reasonable plan for the EDI that documents all three of the following:
 - 1) An assessment and analysis of community needs, resources and regional economic conditions? And how does the required/attached business plan demonstrate or document the assessment of community needs?
 - 2) A clear, comprehensive and detailed strategic plan for the EDI for the next 3 to 5 years which includes reasonable organizational development goals and financial projections (income and expenses); and
 - 3) A commitment and strategy for ongoing leadership development for low-income employees and low-income board members?
- If the application includes an Interim Report, how well is the EDI keeping to the plan? How well is the EDI making necessary adjustments to the plan in order to reach their stated goals?

COMMUNITY INVOLVEMENT

Community-based projects are far more likely to be successful if: 1) their project directly responds to a clearly-identified and widely-recognized local challenge/problem/issue; and 2) the organization is connected to many other organizations and institutions, both to draw in participants and to gather support ("political" and financial) for the issue.

- Does this applicant and its project exhibit these characteristics – does it respond to a recognized local issue and connect to many potential partners? How?

ECONOMIC DEVELOPMENT PROGRAM PRIORITIES

- Is the applicant expanding its efforts – seeking more customers, more market territory, more products and services, more sales through its EDI?
- Is the applicant encouraging solidarity and involvement among diverse groups?
- Is the applicant developing information and evaluation systems that will enhance planning, accountability and its own learning and that of other like organizations?

CATHOLIC MORAL AND SOCIAL TEACHING

- Has the DD had a conversation with the group about Catholic Moral and Social Teaching?
- Does the organization understand the types of activities that would be in contradiction of Catholic Moral and Social Teaching? Are the group's activities in conformity with Catholic Teaching?
- Is there a specific Catholic social teaching principle which the applicant animates (Life & Dignity of the Human Person, Call to Family, Community and Participation, Rights & Responsibilities, Option for the Poor, Dignity of Work and the Rights of Workers, Solidarity or Care for God's Creation)? If so, which ones?

USCCB PRIORITIES

- How does the group's work advance the USCCB priorities of 1) affirming the intrinsic value of human life and the dignity of every human being, 2) promoting understanding and acceptance of cultural diversity or 3) strengthening marriage and family Life?

CATHOLIC PARTICIPATION

- How have or how do Catholics participate in the organization?
- Why is it a priority for the local diocese for CCHD to fund this request?

NONPARTISAN ACTIVITY

- Is the applicant engaged in partisan political activity that makes it not eligible for funding?

SUGGESTED FOLLOW-UP QUESTIONS OR POINTS NEEDING CLARIFICATION

ADDITIONAL COMMENTS

CCHD welcomes any additional information, recommendations, insights and comments from the Diocesan Director and/or their local evaluation committee.

RECOMMENDED GRANT CONDITIONS

A group may be recommended for funding with conditions, meaning that a group may be recommended for funding so long as it meets certain requirements as determined by CCHD Diocesan Director and National Staff.

1/18/11

CCHD: Bishop Support for Funding Activities Form (Activity in Single Diocese)

To be mailed in to CCHD 3211 4th Street NE Washington DC 20017-1194

APPLICATION ID #:

AMOUNT REQUESTED: \$

Name of Applicant Organization:

Name of Diocesan Director:

Please list names of current CCHD committee members:

Names of person(s) who participated in the evaluation:

- Was a site visit conducted? (check one) yes no date:
- Was the group's website checked for content and affiliations that contradict Catholic Moral or Social Teaching? (check one) yes no date:
- Was an internet search for affiliations/content that contradicts Catholic Moral or Social Teaching conducted? (check one) yes no date:

RECOMMENDATION:

FUND

NO FUND:

AMOUNT: \$

Conditions or other notes, if any:

To be completed by the Diocesan Bishop:

Statement of Review by Diocesan Bishop:

I am aware that this organization has applied for national funding to the Catholic Campaign for Human Development and that it is headquartered in and/or plans activities in my own dioceses. I know that this application will be considered along with many other applications and thus may not be selected for funding.

I have reviewed both the local and national staff evaluations for this organization and considered their joint recommendation. Based on this, (Please check one:)

_____ I need more information regarding this grant request and would like national CCHD Staff to contact me regarding this grant.

_____ I need more time to review this grant request. I will submit my decision by _____(date)

_____ I endorse national CCHD funding for this organization. I realize, however, that this application will be considered along with many other applicants and thus may not be selected for funding.

_____ I do not endorse national CCHD funding for this application.

Reason/s and/or Comments:

SIGNATURE: _____ ***DATE:*** _____

CCHD: Bishop Support for Funding Activities Form (Activity in Multiple Dioceses)

To be mailed in to CCHD 3211 4th Street NE Washington DC 20017-1194

APPLICATION ID #:

AMOUNT REQUESTED: \$

Name of Applicant Organization:

Primary diocese in which the organization is headquartered or in which the organization's principal activities will be located:

Other dioceses in which the organization will be active:

Name of Diocesan Director:

Please list names of current CCHD committee members:

Names of person(s) who participated in the evaluation:

- Was a site visit conducted? (check one) yes no date:

- Was the group's website checked for content and affiliations that contradict Catholic Moral or Social Teaching? (check one) yes no date:

- Was an internet search for affiliations/content that contradicts Catholic Moral or Social Teaching conducted? (check one) yes no date:

RECOMMENDATION:

FUND

NO FUND:

AMOUNT: \$

Conditions or other notes, if any:

To be completed by the Diocesan Bishop:

Statement of Review by Diocesan Bishop:

I am aware that this organization has applied for national funding to the Catholic Campaign for Human Development and that it is headquartered in and/or plans some activities in my own and other dioceses. I know that this application will be considered along with many other applications and thus may not be selected for funding.

I have reviewed the evaluations completed by both the CCHD national diocesan staff and as Bishop of this diocese. Based on this, (Please check one:)

_____ I endorse national CCHD funding for this application.

_____ I will accept the decision of the Bishop in whose diocese the applicant is headquartered and/or has its principal activities.

_____ I need more information regarding this grant request and would like national CCHD Staff to contact me regarding this grant.

_____ I need more time to review this grant request. I will submit my decision by _____(date)

_____ I do not endorse national CCHD funding for this application.

REASON:

SIGNATURE:

DATE:

