Break the cycle of poverty
BUILD COMMUNITY
Catholic Campaign for Human Development

CATHOLIC CAMPAIGN FOR HUMAN DEVELOPMENT

GRANT PROGRAM

Guide for Catholic Campaign for Human Development Grant Applicants

Catholic Campaign for Human Development
United States Conference of Catholic Bishops
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This revised and updated guide will help you complete the CCHD Community Development and Economic Development grant applications online. It provides definitions of terms used by CCHD, clarifications on policies related to CCHD funding, and includes useful tips for completing and submitting your application.

Please read the entire guide before you begin your online application.

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1. About CCHD

a. Defining Principles

The Catholic Campaign for Human Development is the domestic anti-poverty program of the U.S. Catholic Bishops. ***CCHD works to break the cycle of poverty by helping low-income people participate in decisions that affect their lives, families and communities.*** CCHD offers a hand up, not a hand out.

CCHD has a complementary mission of educating on poverty and its causes. This dual pastoral strategy of education for justice and helping people who are poor speak and act for themselves reflects the mandate of the Scriptures and the principles of Catholic social teaching.

CCHD also provides the Catholic faithful with concrete opportunities to live out the love of God and neighbor in ways that express our baptismal call and continuing Eucharistic transformation. Pope Benedict XVI has taught that "restoration of justice, reconciliation and forgiveness" requires:

> *determination to transform unjust structures and to restore respect for the dignity of all men and women, created in God's image and likeness. Through the concrete fulfillment of this responsibility, the Eucharist becomes in life what it signifies in its celebration.*
>
> *(Sacramentum Caritatis, #89, 2007)*

CCHD is made possible by the generous support of Catholics in the United States, especially through an annual parish collection. CCHD's grants to local anti-poverty efforts are screened, awarded and monitored in close partnership with local Catholic dioceses. CCHD grants to groups in a local community require the explicit approval of the bishop of that diocese.

CCHD is a unique and essential part of the Catholic community's broad commitment to assist low-income people, families and communities. This commitment also includes our Catholic parishes, schools, Catholic Charities, health ministries, and countless other examples of service to "the least of these." (Matt. 25) Like many other Catholic ministries, CCHD helps people overcome poverty without regard to their race, ethnicity or religion. As a national initiative of the Bishops' Conference, CCHD is an essential and complementary part of the Catholic social mission proclaimed by Jesus Christ and taught by His Church. CCHD does not replace, nor can it be replaced by, other expressions of the Church's essential social mission.

The belief that those who are directly affected by unjust systems and structures truly have the best insight into knowing how to change them is central to CCHD. As a result, CCHD expects and requires that grant recipients integrate low-income control into the governing structure of their organizations and projects, and that projects include an effective leadership development component as part of each project's annual activities. Details about low-income control and leadership development are included elsewhere in this Guide.

The following are *Basic Principles of Catholic Mission* as they are applied by the Catholic Campaign for Human Development. In the light of the Catholic Church's moral and social teachings and tradition, CCHD asks organizations requesting funding to understand and adhere to the basic principles central to the Catholic mission.

- Respect for Human Life and Dignity: CCHD works to protect and enhance the life and dignity of all from the first moment of conception to the moment of natural death and every moment on the spectrum of life in between, especially focusing on the lives and dignity of those who are poor, vulnerable or suffering economic or other injustice.

- Priority for the Poor: CCHD practices the Church's priority for the poor, helping low-income and vulnerable people improve their lives and communities by their own actions.

- Participation: CCHD works from the bottom up, emphasizing self-help, participation and decision-making by poor people themselves to address their own situations.

- Subsidiarity: CCHD focuses on local communities seeking to give voice to those closest to problems of poverty, as these communities address economic injustice working with local, state or national institutions to address the causes of poverty.

- Solidarity: CCHD is a sign of solidarity, standing with and for those who are poor, seeking to strengthen communities and helping to build bridges between those who are poor and those who are not.

- Strengthen Family and Build Community: CCHD works to support and strengthen the fundamental social institutions of marriage and family and other mediating structures, including parishes, neighborhoods, community organizations, economic development groups and worker and other associations.

There is also more detailed information about the Basic Principles of CCHD at this website:

http://www.usccb.org/about/catholic-campaign-for-human-development/grants/cchd-basic-principles-of-catholic-mission.cfm

b. Overview of CCHD Grant Programs

CCHD is committed to supporting organizations led by low-income individuals as they work to break the cycle of poverty and improve their communities. These efforts may come in the form of:

- Community Development (CD) Projects, or
- Economic Development (ED) Projects.

Community Development Grant Program

CCHD's Community Development grants support efforts that nurture solidarity between the poor and non-poor, facilitating the participation of people living in poverty in the institutional decisions that perpetuate poverty in their lives. In CD projects, low-income people gain the ability to identify barriers, brainstorm solutions, and take action to change problematic structures and systems in their communities.

Economic Development Grant Program

CCHD Economic Development grants support initiatives that significantly include the voice of poor and marginalized people in developing new businesses that create social benefits, offer good jobs and/or develop assets that will be owned and enjoyed by local communities.

COMPARING CD AND ED PROGRAMS AT CCHD

Criteria (eligibility)	Community Development Projects (CD)	Economic Development Projects (ED)
Goal:	To address the roots of poverty by changing institutional barriers, societal behavior and public policies	To address the roots of poverty by creating more just economic institutions
Activities:	Education, advocacy, policy development and organizing	Creating EDIs (Economic Development Institutions) such as social enterprises, alternative financial institutions, community-held assets, worker-owned cooperatives
Tax Status:	501-c-3 (approved or applied for)	See Page 5, Part B
Catholic Social Teaching:	Written affirmation of compliance	Written affirmation of compliance
Partisan Political Activity:	No participation permitted	No participation permitted
Low-Income Participation in Governance	50% of governing board members	33% of governing board members
Low-Income Benefit	50% or more of program beneficiaries	50% or more of program beneficiaries
Grant Amounts:	$25,000 - $75,000	$25,000 - $75,000
Match Requirement:	None	1:1 (in-kind not counted)
Terms of Funding:	Annual renewal; 6 years maximum (1997-present); 3 year break; 6 years maximum again	Annual renewal; 3 years maximum, sequential or not

The next chapter of this Guide provides further detail about both Community Development and Economic Development projects. Please contact your grants specialist to determine your eligibility for the current grant cycle. (Find the grants specialist for your region with the map at the end of this guide, or go online at www.usccb.org/cchd.)

c. Understanding the Diocesan Structure

CCHD is a program of the <ins>United States Conference of Catholic Bishops</ins> and, in
most cases, has a locally appointed <ins>director in each of the more than 180 dioceses</ins>
throughout the United States, Puerto Rico, and the Virgin Islands.

A **diocese** is an intermediate Catholic Church structure into which local Catholic
communities, or **parishes**, are organized under the leadership and authority of a
diocesan bishop. Each diocesan bishop designates a CCHD diocesan director
(sometimes referred to as "DD"), who is responsible for implementing CCHD's
mission and program within the diocese, including evaluating applications for
CCHD funding.

The local bishop(s) or archbishop(s) **must review and endorse** organizations planning
activities that will take place within the respective diocese(s) before CCHD funds will
be granted. **CCHD strongly recommends that applicant organizations make contact
with the local Diocesan Director in each diocese where their organization is active,
upon submitting an application.** To find out which diocese(s) your organization is
located in, or to identify the local CCHD diocesan directors, visit
<ins>http://www.usccb.org/about/catholic-campaign-for-human-development/diocesan-
coordinators-catholic-campaign-for-human-development.cfm</ins>.

2. The Pre-Application and Application Steps for CCHD Grants

a. The Pre-Application and Application Process

CCHD grants, both Community Development and Economic Development, require a
Pre-Application if your organization has not been a grantee previously. The Pre-
Application allows you to outline your organization's general qualifications and
plans, and invites the CCHD staff to advise you on its eligibility and readiness for
grant support. It is CCHD's intent that the Pre-Application will: 1) help interested
organizations gain an understanding of CCHD's mission and criteria; 2) help them
determine whether or not their work is a good match for CCHD funding; 3) allow
CCHD to determine if an applicant's proposal is consistent with CCHD criteria,
priorities; and 4) advise CCHD on whether the group should be invited to submit a
full application.

The CCHD Pre-Application may be submitted between September 1 and **the
deadline for each annual funding cycle, November 1 (11:59 P.M. EST).** Pre-
Applications received by November 1 will be reviewed and, if approved, will result
in CCHD sending an email notification no later than November 22 that invites the
organization to submit a full application. CCHD recommends submitting your pre-

application well in advance of the November 1 deadline to help with speedier
processing and to give applicants more time if invited to submit a full application.

If your Pre-Application is approved, your organization will be offered the
opportunity to prepare and submit a longer, more detailed Application along with
supporting documentation as required in the Application. **Final grant applications
have a submission deadline of December 15.** These grant applications are then
reviewed by CCHD staff, local Diocesan Directors; if approved by Diocesan Bishop,
the grant request will be reviewed and approved by the Catholic Campaign for
Subcommittee of Bishops. The grants usually commence the following June.

It is to your benefit that your local CCHD Diocesan Director or CCHD Coordinators
be aware of your organization's work and of your interest in applying for CCHD
national funds. No CCHD grant is awarded without the endorsement of the local
bishop. **Please contact your local CCHD Diocesan Director** to ensure they are aware
of your pre-application submission. You can find their contact information here.

If, after reviewing all material carefully, you have additional questions, CCHD's
grant staff is available year round to answer questions about CCHD grant programs
and the application process. Contact information for the national grants specialists
by state can be found here.

You are also invited to use the following information as Checklists to determine
your likely eligibility and readiness to apply for CCHD financial support.

b. Are You Eligible?

☐ For CD Applicants ONLY: Are you a nonprofit 501-c-3 organization?
If your organization is not a 501-c-3 tax exempt organization, but has
Form 1023, Application for Recognition of Exemption under Section
501c3 pending with the IRS, you may still be considered for CCHD
funding. Any grant award will be conditioned upon receipt of an IRS
exemption determination letter before the deadline for CCHD funding.

☐ For ED Applicants ONLY: Are you a nonprofit 501-c-3 organization?
If not yet tax exempt, your grant will need to be processed through a
fiscal sponsor, another nonprofit organization that already has its tax
exempt status and is identified in the application. See information
below on "fiscal sponsor" definition.

☐ Can you affirm compliance with Catholic Social Teachings? This means
that your organization, and its affiliates, partners and coalition
members must not endorse or advocate policies and issues that are
contrary to Catholic Social Teaching – such as favoring abortion,

euthanasia, capital punishment, same-sex marriage, racism, sexism
and other prejudices

☐ Do you have low-income people as active members of the governing
body at the level required for either CD or ED grantees [see table
above]? CCHD believes that low-income people have both the right and
the responsibility to participate in planning, decision-making and
implementation of the projects and programs designed to improve their
communities. CCHD will ask you to explain your structure and your
efforts to maintain/improve low-income participation. CCHD will also
examine your organizational bylaws to see if low-income
representation is a formal component of your corporate structure. If
your organization does not yet meet this qualification, you will be
asked to explain why as well as inform CCHD regarding how and when
you will meet this criterion.

☐ Does your strategic plan or annual work plan incorporate effective
leadership development strategies in your program or project? These
training efforts ensure that low-income people and program
beneficiaries gain the skills, experience and confidence to participate
effectively both within the organization and in the wider civic arena.
See information below regarding the definition of Leadership
Development.

☐ Does your organization have a primary focus on direct service – even if
those services are provided largely to low income and economically
disadvantaged persons and institutions? Examples would include:
daycare centers, recreation programs, community centers,
scholarships, educational/vocational subsidies, counseling programs,
training or consulting services, referral services including job
placement, cultural enrichment programs, clinical or health services,
emergency shelters, refugee resettlement programs, etc. If your
program/organization is not creating an EDI (ED) or engaged in efforts
that result in institutional change (CD), then your project is likely **not**
eligible for CCHD grant support. Contact CCHD Grant Staff (see
contact information below) for more clarification.

☐ Are your organization's Net Assets greater than zero? In other words,
are the Net Assets a positive number rather than a negative number?
If not, your organization may not be sufficiently "solvent" to quality for
CCHD funding.

☐ For ED Applicants ONLY: Is your organization or project creating an
Economic Development Institution (EDI) that already does or will/can

stand alone (separate from its Parent Nonprofit, if any) in the near future? See information below on the definition of [Parent Nonprofit](). An EDI is a "social enterprise" – a business that has multiple "bottom lines" or goals. It should generate social / economic benefit for low-income people; it should also operate in a way that eventually generates sufficient earnings to support most/all of its costs rather than relying solely on charitable support.

☐ For CD Applicants ONLY: Does your organization support projects that demonstrate a commitment to the dignity of the human person? Is it led by people living in poverty who work to address the root causes of poverty by seeking institutional change? See information below regarding the definition of [Institutional Change](). Does your organization nurture solidarity between the poor and non-poor, and facilitate the participation of people living in poverty in the decisions that perpetuate poverty in their lives?

c. Are You Ready?

CCHD understands that many CCHD grant applicants are relatively new and small organizations, and are sometimes still "projects" within larger nonprofit organizations. The path from concept to implementation (and independence) involves many steps in organizational development, but there are several specific thresholds that must be met before your organization is ready to apply – and compete – for CCHD grants.

☐ Does your organization, EDI or CD project have a governing body – a steering committee, a sponsoring committee, a standing committee (within your Parenting Nonprofit's board), or a Board of Directors? If there is not yet a governance team in place, or if that governance team is solely composed of staff members, your application for CCHD funding may be premature. For CD applicants only, if your governing body is a sponsoring committee composed largely of clergy and has not yet transitioned to community representatives, you may still apply for CD funding.

☐ Does your governing body prepare and approve written meeting minutes that represent the issues discussed and the decisions made at all gatherings of that body? Your full application will require the submission of written minutes, and their attachment reports, for up to a year of meetings. If you do not have written records of your decision-making and governance deliberations for the most recent year (or shorter, if you've been operating for less time), you may want to

postpone your application until your internal systems are fully operational.

☐ For CD applicants, does your organization have a membership comprised of individuals and/or institutions from your community that support and participate in your activities? Your network of supporters and participants is an indicator of your preparation, the importance of your issue as affirmed by others, and your likelihood for success. You will be asked to supply a list of your members with your Application and, if that recruiting process is still in its infancy, you may want to wait to apply for CD funding in a future year.

☐ Can you provide financial statements for your recent fiscal years (or partial fiscal years)? A financial statement includes BOTH a balance sheet (assets and liabilities) and an income statement (revenues and expenses). A budget or a Sources / Uses list is not sufficient information. If you cannot produce a financial statement – or show the projects or EDI's assets, liabilities, revenue and expenses either separately or within the financial statements of its Parent Nonprofit – then your application for CCHD funding may be premature.

☐ If your organization (as a Parent Nonprofit, EDI, or other affiliate) has total assets of more than $1 million, you will be expected to submit recently audited financial statements – reviewed and verified by a qualified and independent accountant – as well as your recent IRS 990 tax return. [NOTE: If your organization is smaller than this asset size, internally-prepared financial statements are sufficient, along with the IRS 990 tax return.] If your organization is larger than $1 million in assets and has not yet had an audit conducted for its financial statements, you will be asked to explain to CCHD why that important step has not yet occurred.

☐ Is the amount of your CCHD grant request smaller than the amount of your organization's Total Assets? Asking for more financial support than you've typically received in the past raises important questions about your planning and your capacity. If you were intending to request a grant that is larger than your Total Assets, you should either reduce your requested amount or wait until your organization grows sufficiently to apply for a larger amount of CCHD funding.

☐ If you are an ED applicant, have your identified and raised your required 1:1 matching funds from other sources? If those funds are not yet in-hand or are not reasonably certain to be available by the time of the CCHD grant year, you may want to continue your local fundraising

and apply for CCHD funds in a future year when you can demonstrate the minimum local support for your project.

☐ For ED applicants that represent "projects" within Parent Nonprofits, does that Parent Nonprofit include the project within its own broader strategic plan? If the project is not clearly consistent with and affirmed by the Parent Nonprofit's mission and coordinated with its other program activities, then you might be wise to develop that relationship further before applying for CCHD funds.

☐ For ED applicants, does your EDI have a recent, current strategic / business plan? See the Definitions section of this Guide to have a better understanding of what comprises a Business Plan and how a Strategic Plan is different. If your EDI does not yet have a formal, approved plan (strategic or business), then you may wish to work on developing and completing that plan before requesting a CCHD grant for implementation of that plan.

3. Community Development Program

a. What is *Community Development*?

Community Development grants support projects that demonstrate a commitment to the dignity of the human person. CCHD-funded groups are led by people living in poverty and work to address the root causes of poverty, nurturing solidarity between the poor and non-poor and facilitating the participation of people living in poverty in the decisions that perpetuate poverty in their lives. As part of such efforts, low-income people gain the ability to identify barriers, brainstorm solutions, and take action to change problematic structures and systems in their

Community Development projects address the root causes of poverty by seeking institutional change. See definition below of Institutional Change. The organization's efforts should directly benefit a relatively large number of people, rather than a few individuals.

4. Economic Development Program

a) What is an *Economic Development Institution*?

CCHD's economic development program focuses on Economic Development Institutions (EDIs). Typically EDIs are organizations, businesses, or real estate initiatives that are structured for lasting community ownership and low-income control of valuable assets.

CCHD supports economic development initiatives (EDIs) that significantly include the voice of the poor and marginalized in creating community assets. Those assets include good jobs (with living wage and/or other benefits), affordable housing, the opportunity to create or own a thriving business, and democratic financial institutions. Ideally, although these EDIs may be initially created within broader nonprofit organizations, they are designed to eventually operate independently from their "Parent Nonprofit."

CCHD funds five types of Economic Development Institutions:

> Community-Owned Real Estate Initiatives
> Business Incubators and Marketplaces
> Community Development Financial Institutions
> Social Purpose and Training Businesses
> Worker-Owned Co-Ops and Community-Owned Businesses

Visit CCHD's Web site for a look at each type of EDI:
www.usccb.org/cchd/edgengrant.shtml.

b) What outcomes does CCHD expect from Economic Development grants?

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:

i.   EDIs must create 10 or more new jobs that pay a living wage as determined by regional standards, and/or

ii. EDIs must develop asset ownership for 10 or more individuals or families while also benefiting the larger community.

CCHD's Economic Development Grant applicants are required to submit a complete strategic or business plan for the EDI. That plan must clearly relate the applicant's expected outcomes to an assessment and of its community's needs. In some underserved or distressed areas of the country (e.g., some rural and reservation communities), lower threshold outcomes may be given special consideration as determined by regional standards.

5. Important CCHD Application Definitions

This section provides definitions for key terms in the application, and clarifications that may help you develop your responses.

LOW-INCOME CONTROL | INSTITUTIONAL CHANGE | LEADERSHIP DEVELOPMENT
ORGANIZATIONAL DEVELOPMENT | ACTION | TECHNICAL ASSISTANCE PROVIDER JOB
CREATION AND JOBS PLACEMENT | FISCAL SPONSOR AND PARENT NONPROFIT |
STRATEGIC PLAN AND BUSINESS PLAN

a. What does CCHD mean by *Low-Income Control*? [CD and ED applicants]

The participation of low-income people in the shaping and ongoing direction of organizations is a central criterion for CCHD funding, based on Catholic social teaching on the **dignity of the human person**, **preferential option for the poor** and on **subsidiarity**—the principle that people who are experiencing a particular problem are best equipped to develop solutions to that problem. Low-income people must have and maintain a strong voice in the organization's leadership, both in its governance structure and its policy decisions, especially through their direct participation in the board of directors.

Low-income control also involves "ownership" of the processes within an organization and understanding of the community issues.

CCHD is committed to overcome poverty in the United States and focuses on how the principles of participation, subsidiarity and solidarity shape CCHD's emphasis on the poor speaking and acting for themselves.

   A. CCHD insists on the priority of "human development" urging funded groups to build capacity and develop leadership through engaging and working with people living in poverty.
   B. CCHD requires that CCHD funded activities benefit people "living in poverty," with a majority of those benefiting from an organization's efforts people experiencing poverty. One standard CCHD uses to assure that poor people have a decisive voice in the activities of an organization is board

composition, where a specified proportion of those who make actual policy are poor themselves.   [NB: A useful measure of poverty is a percentage of the Area Median Income (AMI), with 50% of AMI considered "very low income" and 80% of AMI considered 'low income.'(For example, in Kalamazoo Michigan 80% of AMI is $43,000 for a family of 3 and 50% of AMI is $28,300.)]

C. In addition to board make-up, CCHD considers how organizations effectively practice the principle of participation and a priority for the poor, including:

   i. Organizations with a predominately *low-income membership* focusing primarily on issues related to poverty which have or are developing effective structures and processes to ensure that low-income people are central in decision-making.

   ii. Organizations which include *both low-income and other Catholic parishes*, congregations or groups where structures are in place to ensure that low-income participation is integral to decision-making and low-income priorities are central to the organization's agenda and there is evidence of genuine solidarity and cooperation in overcoming poverty.

   iii. Other structures, vehicles and methods to insure that the voices of the poor themselves have a substantial role in setting directions, priorities and policies of an organization could also be considered.

D. CCHD understands poverty to also include: "persons directly experiencing economic or social injustice, i.e. racial or ethnic discrimination, handicapping or disabling conditions, long-term joblessness, policies which break up poor families and particularly hurt low-income children, economic dislocation and disinvestment that undermine the ability to meet basic needs for them and their families."

E. For purposes of evaluating the participation and decision-making role of those most affected by poverty, CCHD considers priests and religious who primarily serve low-income people, parishes and communities and live in solidarity with their people in those communities as contributing to this goal. However, a board or organization made up exclusively or primarily of clergy and religious would not be considered a low-income board or organization for this purpose.

b. How does CCHD define *Institutional Change*? [CD applicants]

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 low-income people.

CCHD defines institutional change as:

Modification of existing laws and/or policies;

> Changing the behavior of individuals and institutions (including governmental entities) to benefit the community, especially disenfranchised persons, low-income persons, or otherwise economically or socially disadvantaged people.

> **Establishment of participatory and just social structures and/or redistribution of decision-making powers so that people living in poverty are involved in policy-making that affects their lives.**

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

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

Here is an example of an **institutional change** goal, and how it might be outlined:

> <u>Institutional Change Goal:</u> To secure passage of a rent control law this year.

> <u>Strategy:</u> Organize people in 20 low-income apartment complexes on the east side of the Hudson River in order to get council members to support the bill.

> <u>Activities/Tasks</u> (to achieve goals):

> > 1st Half of Grant Year
> > 1. Conduct 20 interviews in each complex
> > 2. Hold 12 "solidarity" meetings with community churches.
> > 3. Hold 5 "know your rights" meetings with 50 people at each meeting.
> > 4. Bring 200 leaders to the City Hall to talk with council members.

> > 2nd Half of Grant Year
> > 1. Find a sponsor for rent control bill.
> > 2. Hold educational meeting with 10 diverse churches.
> > 3. Hold a meeting with the mayor to gain his/her support.
> > 4. Have the bill introduced during the next session of the council.
> > 5. Get members to call council members to support the bill.

c. What does CCHD mean by *Leadership Development*? [CD and ED applicants]

The development of the human person is central to Catholic social teaching. As such, CCHD considers the initial and continual **leadership development** a central component of their grant-making. Applicant organizations should demonstrate a strong track record and commitment to ongoing development of leaders within the organization.

Plans for training may include social analysis, issue identification, elements of organizing, fundraising, board development, etc. Training should focus on equipping members with skills in the field of community improvement or, depending on the type of proposal submitted, economic development. Skill training focused on personal development, while often an important complement to the work of an applicant active in community development or economic development efforts should not be the focus of the proposal to CCHD.

Here is an example of a **leadership development** goal for community development applicants, and how it might be outlined in a CD application:

Leadership Development Goals:

I. To train and develop 20 new leaders to know how to build the organization's constituency and identify issues through a listening campaign, and to identify leaders to send to national training event April 5-10.
II. Identify potential leaders to participate in issue campaigns.

Strategy: Identify, train and engage 15-20 current leaders to participate in a listening campaign.

Activities/Tasks (to achieve goals):

1st Half of Grant Year
1. Gather with leadership to plan campaign timeline and training (July)
2. Identify at least 40 leaders to attend training (July-August)
3. Conduct training for at least 40 leaders and find at least 15 who will put their training into practice (September)
4. Conduct listening campaign October to mid-December (100-150 one-to-ones)
5. Evaluate listening campaign and find out what issues came up, and what potential new leadership was discovered (early January)

2nd Half of Grant Year
1. One-to-one follow-up with all new leaders by staff (January-March)
2. Conduct two trainings with new potential leaders (February/March) on basics of community organizing (building public relationships, one-to-ones, issues and issue campaigns, power and power analysis, running good meetings, etc.)

3. Invite new leaders to national training and incorporate interested leaders into issue teams and ongoing/new issue campaigns.

d. How does CCHD define *Organizational Development*? [CD applicants]

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.

Here is an example of an **organizational development** goal, and how it might be outlined:

Organizational Development Goal: To recruit 10 new member groups to the organization during the grant year.

Strategy: Identify and build relationships with potential member groups.

Activities/Tasks (to achieve goals):

1st Half of Grant Year
1) Discuss with board plan to recruit new member organizations, brainstorm potential new members and nominate leaders to be on the outreach committee.
2) Provide training to outreach committee and expand list of potential member organizations (September)
3) Conduct outreach (October-December)

2nd Half of Grant Year
1) Convene leaders from potential member groups. Provide basic overview of organizing/vision of the organization (January)
2) Follow up one-to-ones with leaders from new potential groups (February)
3) Invite leaders interested in exploring membership to scheduled events for further training/strengthening relationships/trust (March-May)
4) Follow up one-to-ones/decisions on membership (July)
5) Welcome new member groups to the organization.

e. What does CCHD mean by "*Values Driven Action?*" [CD applicants]

 "Values driven **actions**" are actions based in a vision of the good where an organization puts forward a plan, a set of requests, or other information before public or private sector officials who oppose a position that helps persons determine means for climbing out of poverty.

Actions may be small (25-35 people) or large (2000+ people), but they are always an opportunity for the group to mobilize their members to directly and actively participate in dialogue, and often in negotiations, around the issues they put forward. In this way, a "value based **actions**" reflect a central component of Catholic social teaching, which calls all individuals, regardless of income or social status, to be active, contributing members of their communities.

f. What is a *Technical Assistance Provider*? [CD and ED applicants]

A **Technical Assistance Provider** can be a network, a trade association, a consulting firm or organization, or a single individual consultant. Any of these sources may provide numerous services, such as organizing or business training for staff, board or general leadership (e.g., power analysis, issue identification, how to run a meeting, how to plan and run an action, how to do a feasibility study or business plan). Technical Assistance providers may also provide short-term help with recruitment methods developing strategic/business or any long- or short-term plans, or with financial or fundraising support.

The technical assistance provider is an entity that helps your organization stay on course and develop into a stronger organization and/or business. The involvement of Technical Assistance Providers in the implementation of your proposed work plan (or strategic/business plan) is a positive indicator that your organization has access to the expertise it needs to be successful.

g. What is the difference between *Job Creation* and *Job Placement*? [ED applicants]

Economic Development Institutions (EDIs) are expected to create either jobs or other community-held assets. Job creation comes as a result of starting or supporting small businesses, including training and social purpose businesses – and those businesses hire local people in order to build, make, produce, sell or deliver products and services to the public. Their products and services range from ethnic foods to computer recycling to janitorial work and everything in between.

Businesses seek new workers, hire them into staff positions, train them for the work required, and employ them in the business – sometimes for short periods until they progress to other opportunities, and sometimes for longer periods as may suit both the employer and the worker.

Confusion sometimes arises when a CCHD grant applicant is in the "business" of providing job training, without hiring for any positions, so that participants are simply better prepared to seek employment in the larger community. Sometimes, as well, an applicant organization is in the "business" of helping workers find employment (job placement) – so they evaluate skills, develop resumes, share interviewing techniques and refer workers to local job opportunities. Both of these programs are beneficial, but they do not qualify as EDIs that are creating jobs.

h. What is meant by *Fiscal Sponsor* and *Parent Nonprofit*? [ED applicants]

There are situations where the project to be funded with a CCHD grant is not the only organization involved in applying for the grant – usually due to the size or "maturity" of the project. Sometimes there is also a Fiscal Sponsor and/or a Parent Nonprofit involved.

Fiscal Sponsor: When the project's organization, for example, does not yet have its 501-c-3 tax exempt status (or will never have it due to its corporate structure), the applicant organization needs to arrange for a "fiscal sponsor" – a nonprofit organization WITH its federal tax exemption in place – to serve as a conduit for the CCHD grant funds. In this case, the fiscal sponsor is the recipient of the grant on behalf of the project and is responsible for tracking and reporting on the funds to CCHD (although usually those reports will be prepared by the funded project). The fiscal sponsor is not responsible for carrying out the program activities or maintaining compliance with CCHD's policies and procedures.

Parent Nonprofit: CCHD uses the term "Parent Nonprofit" to refer to larger and more experienced organizations that create newer, smaller organizations. The "children" organizations may remain related to the parent as corporate affiliates / subsidiaries – called support corporations in the nonprofit world – or may eventually be completely autonomous. Especially for EDIs, it is often the case that the "child' is a nonprofit, for-profit or cooperative business that may eventually take on liabilities (loans) to build its assets, or may manage capital or real estate and therefore become accountable to other entities. Its ability to be autonomous, "independent" or semi-independent is part of the plan for its development, and helps ensure that the mission of the Parent Nonprofit is supported by, but not confused with, the mission of the EDI. The EDI will, either at the beginning or sometime along its road, have its own governing board to ensure its ability to make

decisions in its own best interest.

i. What is the difference between a *Strategic Plan* and a *Business Plan?* [ED applicants]

In general, Strategic Plans are somewhat simpler and shorter-term than Business Plans. Strategic Plans often cover 1-3 years and usually include only a 1-year budget. Business Plans typically extend for 3-5 years and include more detailed multi-year financial projections, including projected balance sheets. Strategic Plans provide operational focus for the organization, while Business Plans are often used to invite investment or funding from those outside the organization. A good Strategic Plan is also an essential step in developing a cogent Business Plan – so many larger and more mature nonprofit organizations have both.

CCHD wants to know that CD and ED grant applicants have evaluated the community's circumstances and needs, have analyzed themselves and their capacity to deliver and have laid out their programs consistent with that capacity (they have not over-promised or over-committed). CCHD also wants to know how and when all the program components will come together to produce the expected results, and to see those results presented in terms that reflect both community impact and financial impact for the organization.

Although the terminology may be different in each, the table below shows how similar/ different Strategic Plans and Business Plans are in structure and components.

Strategic Plan Components	Business Plan Components
Mission/Vision	Mission/Vision
Organizational History [track record]	Company/Business Description [track record and structure]
Program/Project Description(s)	Products and Services
Needs Statement	Market Analysis [demand]
SWOT Analysis	Market Analysis [capacity/competitive advantage]
	Market Analysis [industry]
Collaboration/Partners	Market Analysis [competition]
Goals and Objectives	Operations/Business Strategy
Promotion/Outreach	Sales, Marketing and Delivery
Contingency Plan	Risk Analysis/Contingency Plan
Board / Staff	Management Team
Organizational Budget	Financial Projections (P&L, Balance Sheet, P&L for each "line") and Assumptions

6. Other Frequently Asked Questions

WHY DOESN'T CCHD SUPPORT PARTISAN POLITICAL ACTIVITIES?
WHAT DOES THE MORAL AND SOCIAL TEACHING OF THE CATHOLIC CHURCH
INCLUDE?

a. Why doesn't CCHD support partisan political activities?

Both the teachings of the Catholic Church and the regulations of the U.S. Internal Revenue Service prohibit CCHD from engaging in or supporting partisan political activities. Additionally, under the Internal Revenue Code, all section 501(c)(3) organizations absolutely are prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office.

As such, any organization involved in partisan political activities is ineligible for CCHD funding. Non-partisan voter registration efforts undertaken by applicant groups facilitate civic participation in democracy and are supported by the Church. At the same time, however, any effort that seeks to register voters for one political party over another constitutes partisan political activity. Any group involved in such partisan political activity would be ineligible for funding.

The moral framework of the Catholic Church does not fit the ideologies of "right" or "left," or the platforms of any political party. As an institution, the Church is called to be political (that is, supporting civic participation), but not partisan. The Church's cause is the protection of the weak and vulnerable and defense of human life and dignity, not a particular party or candidate. Therefore, CCHD will not fund organizations whose work includes any partisan efforts.

To learn more about the Church's teaching on political life, consult "*Forming Consciences for Faithful Citizenship—A Call to Political Responsibility from the Catholic Bishops of the United States*" *English* *Spanish* .

b. What does the moral and social teaching of the Catholic Church include?

The following are *Basic Principles of Catholic Mission* as they are applied by the Catholic Campaign for Human Development.

In the light of the Catholic Church's moral and social teachings and tradition, CCHD asks organizations requesting funding to understand and adhere to some basic principles central to the Catholic mission.

- Respect for Human Life and Dignity: CCHD works to protect and enhance

the life and dignity of all from the first moment of conception to the moment of natural death and every moment on the spectrum of life in between, especially focusing on the lives and dignity of those who are poor, vulnerable or suffering economic or other injustice.

- Priority for the Poor: CCHD practices the Church's priority for the poor, helping low-income and vulnerable people improve their lives and communities by their own actions.
- Participation: CCHD works from the bottom up, emphasizing self-help, participation and decision-making by poor people themselves to address their own situations.
- Subsidiarity: CCHD focuses on local communities seeking to give voice to those closest to problems of poverty, as these communities address economic injustice working with local, state or national institutions to address the causes of poverty.
- Solidarity: CCHD is a sign of solidarity, standing with and for those who are poor, seeking to strengthen communities and helping to build bridges between those who are poor and those who are not.
- Strengthen Family and Build Community: CCHD works to support and strengthen the fundamental social institutions of marriage and family and other mediating structures, including parishes, neighborhoods, community organizations, economic development groups and worker and other associations.

7. CCHD Grant Attachments

ARTICLES OF INCORPORATION / CHARTER | BYLAWS| 501-C-3| FINANCIAL STATEMENTS AND AUDITS| TAX RETURNS| BOARD MINUTES | BUDGETS |PRESS CLIPPINGS | INSTITUTIONAL OR COALITION MEMBER LIST| KEY STAFF RESUMES | SUPPLEMENTARY QUESTIONS [ED APPLICANTS ONLY]| STRATEGIC/BUSINESS PLANS [ED APPLICANTS ONLY]

Both CD and ED grant applicants are required to submit various attachments – documents produced for or within their organizations that provide valuable information and backup verification of the responses entered in the Application form. There are no attachments required for the CD or ED Pre-Applications.

Listed below are the Attachments that are required – with notation identifying whether it is for the CD or ED Application – and an explanation of what information that document should include.

a. Articles of Incorporation / Charter (CD and ED applicants)

If the applicant organization (including the Parent Nonprofit and/or its EDI) have been incorporated in their respective states, a copy of the Articles of Incorporation (sometimes called a Charter) for each entity will be submitted with the grant

application. The Articles of Incorporation help verify the applicant organization's (and its EDI's) name and its relationship, if any, to other corporations. It also affirms the organization's age as well as its Purpose or Mission statement.

b. Bylaws (CD and ED applicants)

Organizational bylaws inform CCHD of several important things: the mission statement, who controls or governs the organization (as well as other entities it might control or govern), how the membership and governance is structured, whether there are members and what authority or power those members have, how many board members there should be, how often the board of directors is supposed to meet, who the officers are. It can also provide verification about whether low-income people are assured a certain proportion of the governing body seats.

CCHD grant applicants will submit bylaws for the applicant, any Parent Nonprofit, and any EDI. They should be sure they submit their most recently amended version(s) of their bylaws (not necessarily the original bylaws when the organization was founded). Ideally, the bylaws should be complete, edited properly, dated and signed by a corporate officer.

c. 501-c-3 IRS Determination Letter (CD and ED applicants)

The letter your organization received from the IRS that described the determination of your tax-exempt status will verify that the applicant organization is eligible for receipt of CCHD's charitable dollars. The IRS Determination Letter will be for the applicant organization and/or the Parent Nonprofit. If an EDI is still a project of a nonprofit and not yet a separate entity, CCHD only needs a tax exemption verification for the Parent Nonprofit.

Please ensure that your IRS Determination letter is the "final ruling" rather than the "advance ruling." If you have only an "advance ruling," please check the date on the letter to ensure that it has not yet expired.

d. Financial Statements and Audits (CD and ED applicants)

The applicant organization must submit recent financial statement – see information in the remainder of this section for a definition of "recent" and clarification of what constitutes an acceptable financial statement. Financial Statements provide CCHD with valuable information about the relative size of the organization (especially compared to its grant request and its project budget), about its fundraising track record, about its overall financial solvency, and also informs CCHD regarding any debt or other liabilities the organization may have incurred.

If the grant applicant (or the EDI) is an organization with $1 million or more in Total Assets, the organization must submit an audited financial statement for a fiscal year that ended not more than a year ago. Audited financial statements have been reviewed and verified by a qualified and independent accountant. If your organization is larger than $1 million in assets and has not yet had an independent audit conducted for its financial statements, you will be asked to explain to CCHD why that important step has not yet occurred.

If your organization (or EDI) has less than $1 million in Total Assets, internally-prepared annual financial statements are sufficient – for a fiscal year that ended not more than a year ago. Please note that, if there is both a Parent Nonprofit and EDI, both entities must supply financial statements – audited or not, based on their asset size.

Please note that an annual financial statement, to be complete, must include a balance sheet (assets, liabilities and net assets) and an income statement (revenues, expenses and net income). If the financial statement has been audited, it will also include the audit letter (from the auditor to the organization's board), the statement of cash flows, the statement of functional expenses, and the Notes. If the auditor has supplied a Management Letter to the organization, outlining issues for improved reliability, that letter should be included.

In addition to a "recent" annual financial statement, audited or not, all CCHD applicants must also submit "interim" financial statements. This applies to both a Parent Nonprofit and its EDI if both are involved in the application. Interim financial statements are typically prepared "internally" – by the organization's staff, volunteers, Treasurer or contracted bookkeeper. Interim financial statements provide information for the entire time period between the end of the annual financial statement and the current fiscal quarter. This means that they may cover 3 months, 6 months, 9 months, 12 months – and sometimes even a quarter or two more, if the annual audit is still moving toward completion. For interim financial statements, "recent" means that they reflect financial status and transactions up to a time not more than 3 months ago. Just as for annual statements, interim statements must include both a balance sheet and an income statement to be complete.

e. Tax Returns (CD and ED applicants)

CCHD grant applicants will also supply a copy of their most recently filed IRS 990 tax return. For smaller organizations, this serves as a substitute for an audit; for larger organizations it serves as a cross-check as well as supplies a few more financial details that are not typically in an audit.

Just as for other financial reports, the IRS 990 is submitted for both the Parent Nonprofit and for the EDI – if the EDI has incorporated and files a return.

If your organization is so small that it files a postcard IRS e-990 return, you do not need to submit a scan of that postcard with your grant application.

f. Board Minutes (CD and ED Applicants)

CCHD asks for copies of board meeting minutes so that it can better understand all of the issues "on the table" at governing board meetings, evaluate the overall effectiveness of the governance system, and see how leadership development and volunteer involvement works and feels within the organization. CCHD pays attention to meeting schedules, board quorums, and completeness of the minutes, issues of concern, low income participation, and overall board capacity.

Board minutes are submitted for the applicant, for a Parent Nonprofit and for an EDI, as applicable. Board minutes are submitted for the most recent six (6) meetings of the Board of Directors. Board meetings that are adjourned for lack of a quorum do not count toward the minimum number of meetings for which minutes are submitted.

It is important to note, both for CCHD grant applications and for your corporate record-keeping that minutes are not complete unless they include, as attachments, written reports that are prepared separately for the meeting. Most Board meetings include an Executive Director's report, a financial statement or report, and various committee reports which are sometimes mailed with the Board agenda and sometimes distributed to members at the meeting. Without these attachments, the board minutes you submit to CCHD are full of informational "holes" and are not complete. If these reports are only provided orally, they should be summarized in the minutes rather than simply referred to: "the CEO reported on recent activities."

If your applicant organization does not have a Board of Directors, you should submit the meeting records/minutes for the steering committee, the project committee, or the sponsoring committee – whoever meets on a regular basis to plan, make decisions and implement the project.

g. Budgets (CD and ED applicants)

CCHD grant applicants are required to use the CCHD Budget form in order to supply information that is consistent with all other applicants. When there is both a Parent Nonprofit and a project (or EDI), the budget reflects context for both entities. Applicants should complete the CCHD Budget form with information for their upcoming fiscal year (or the anticipated CCHD grant year from July to June).

The CCHD Budget form provides information about the scale of your project (compared to both mission and capacity); your fundraising strategy including identification of whom else is supporting the effort, and operating expenses which should reflect your priorities and program implementation plans. For EDIs, it also shows what "earnings" might be expected for the coming year, an important component for success.

In the Budget form, CCHD examines your project's size relative to the entire organization, your EDI's size relative to the Parent Nonprofit if any, and looks for compliance with the 1:1 match ratio and eligible expense items. CCHD also evaluates your relative allocations for staff compensation, fringe benefits, leadership development/ training and in-kind support (although in-kind support does not count toward the required match), and your volume and diversity of funding sources.

Please note that there are separate budget forms for CD and ED applicants.

How to fill out the CCHD Budget Form **(ED applicants ONLY)**:

Column #1 should reflect the entire (sole applicant or Parent Nonprofit) organizational budget INCLUDING the CD project and / or EDI as a component of that budget's total expenses. Revenues should include both the National CCHD funds being requested and its required 1:1 cash match, if an EDI. If the applicant is the only organization involved, this column should reflect its entire budget – including other non-CCHD projects that it may be implementing.

If you are already a stand-alone EDI, you can mark Column #1 with N/A and begin with Column #2 or enter the same figures in both columns. Please note that CCHD tries to reconcile this organizational budget (and the Column #2 EDI budget) with your recent financial statements to see if are comparable, even though time periods are different.

Column #2 should be completed to reflect your project budget (within its Parent Nonprofit) or the EDI's budget – and this means the entire budget for the coming year. It should identify all sources of Revenue (including the National CCHD requested amount, its required match and the EDI's anticipated earned revenue), as well as all specific line item Expenses.

For EDIs, this budget should approximate one of the annual "financial projections" columns in the Business Plan -- usually the first year's anticipated operations for a startup. CCHD does compare this upcoming project / EDI budget with one of the years in the business or strategic plan to see if they are consistent.

For all applicants, the project / EDI budget column should include as much Expense detail as you can. CCHD wants to know what occupancy expenses, what program expenses, what travel expenses, and what outside services you are paying for. CCHD also wants to know what expenses are related to board training/leadership development since it is a critical component of every CCHD project.

Your project/EDI budget should also "balance" – it should identify at least enough revenue to cover all the anticipated expenses. If it does not, your entries should provide some indication on how you expect to cover the income shortfall, perhaps by borrowing or by as-yet-unspecified fundraising activities.

Column #3 should show the proposed use of CCHD funds. It includes the CCHD grant request as the sole Revenue and then allocates those funds across the various eligible Expense line items.

Special TIP regarding Columns 1, 2 and 3:

The figures in Column #2 should always be equal to or smaller than the figures in Column #1 – because Column #2 (the project or the EDI) is either the same as or is a "subset" of the entire organization. In other words, Column #1 can be the SAME as Column #2 if there is only a single stand-alone entity applying. BUT, if Column #2 is part of Column #1, its figures can never be larger than Column #1.

If you are an EDI the figures in Column #3 must always be smaller than the figures in Column #2 – because Column #2 includes match funding that should at least double the resources being requested from CCHD.

h. Press Clippings [CD and ED applicants]

Submission of press clippings is encouraged for all CCHD grant applicants. Press or news clippings, however, help CCHD gain a better understanding of how the community sees your organization and how your organization "sells itself" to the broader community.

i. Board Roster [CD and ED applicants]

Your organizational board roster (and EDI board roster, if applicable) must be submitted on the [CCHD Board Roster form](). As for some other application attachments, you should prepare and submit a Board roster for all entities that have a board (or a sponsoring committee or steering committee, etc.). CCHD wants to understand the full governance picture of the applicant.

CCHD ask for a detailed Board roster in order to understand the array of expertise and community relationships represented on your governing body. The descriptions of Board members and their leadership roles helps CCHD evaluate whether your "team" appears to have the capacity to do the job outlined in our application – and should confirm any leadership development and skill building plans you present in your application.

Please note that you should not identify a board member as "low income" if they live within a household that is not low-income, based on the income of all family members. Neither should retirees always be identified as low-income, as often retirees have savings, other assets and a pension in addition to Social Security.

j.   Institutional or Coalition Member List (different for CD and ED applicants)

For CD applicants, CCHD asks that you fill out and submit the [Institutional/Coalition Members List](#) identifying all institutional or organizational members. In community development, the breadth, length and diversity of a membership list gives some indication of the project's strength, capacity and likelihood for success.

For ED applicants, CCHD asks that you fill out and submit [Institutional/Coalition Members List](#), identifying your EDI's partners, collaborators and supporters (other than funders). These are typically organizations and institutions whose work helps you achieve your goals and who may share a mission or a target market. The form also asks you to list professional networks, associations or trade groups, and other organizations that you participate with for the purpose of gaining expertise and support that will lead to future success.   Finally, if you are a member of any local "coalitions" engaged in other community efforts, they and their "issues" should be identified.

k. Key Staff Resumes (CD and ED applicants)

CCHD asks you to submit key resumes because the skills, experience and connections of the primary staff members (the management team) provides valuable insight regarding the organization's capacity and the project's likelihood for success. In general, CCHD expects applicants to submit from 1 to 6 Key Staff Resumes, depending on the size of the organization.

Key resumes describe the professional experience and educational background of the "lead" staff person(s) – for both the Parent Nonprofit and for the EDI. Key resumes should also be submitted for any persons playing the role of "project

manager" or similar coordinative function, the financial manager and the fundraiser.

l. Supplementary Questions [ED applicants only]

CCHD provides a specific form for EDIs that inquires about program goals and strategies that are unique to each type of EDI. The <u>Supplementary Questions</u> form is self-explanatory.

m. Strategic/Business Plans [ED applicants only]:

CCHD asks for business plans from ED applicants for two primary reasons: 1) it facilitates the evaluation of the thinking and planning that has been applied to the EDI; and 2) it helps determine the likelihood for success for the EDI (based on market demand, products and services, operational details, financial structure and anticipated "sales"). CCHD accepts a strategic plan in lieu of a business plan, although a business plan is preferred and offers more detail.

ED grant applicants should expect to submit a strategic/business plan for the EDI, and also submit a strategic/business plan for the Parent Nonprofit, if there is one. Presumably, the EDI is a logical and important piece of a Parent Nonprofit's overall mission and vision and its own strategic/business plan would indicate that.

Strategic Plan Components	Business Plan Components
Mission/Vision: single sentence to paragraph in length; should connect logically to track record and program description	Mission/Vision: single sentence to paragraph in length; should connect logically to track record and program description
Organizational History [track record]: what has been achieved to date that provides confidence for your next endeavor?	Company/Business Description [track record and structure]: what has been achieved to date that provides confidence for your next endeavor (either by your organization or its managers/partners); what is the corporate structure now and permanently; what is the industry or sector for your enterprise?
Program/Project Description(s): outline the proposed activities and expected results to be achieved.	Products and Services: define the products to be made, the services to be offered, the skill and capacity of your EDI to carry out that work successfully
Needs Statement: strategic plans address a community need, usually one that is widely recognized and only needs	Market Analysis [demand]: business plans address "market demand;" need does not always result in demand or

verification	the willingness for customer to pay money for what they need.
SWOT Analysis: Strengths, Weaknesses, Opportunities and Threats that your organization must recognize within its program plans	Market Analysis [capacity/competitive advantage]: Internal evaluation of how your EDI can/will offer a better or more affordable product and in sufficient volume to become sustainable
	Market Analysis [industry]: how do you compare to others providing similar products / services – cost, quality, production volume, and market opportunity?
Collaboration/Partners: Who is available and willing to help?	Market Analysis [competition]: who else offers the same or similar services, perhaps faster or cheaper of higher quality? What will make your EDI special in the eyes of potential customers?
Goals and Objectives: what are the specific steps to be taken to achieve program success and how long will it take	Operations/Business Strategy: what resources to you need (funding, time, and expertise) to serve your customers? What is the volume of sales you can achieve, by when?
Promotion/Outreach: How do you inform others of your efforts and involve them in your work?	Sales, Marketing and Delivery: what is the message, the unique "pitch," the customer base to be reached, the method of delivery – and over what size territory?
Contingency Plan: What are your fallback plans if something does not go as expected?	Risk Analysis/Contingency Plan: what are all the things that could go wrong, what will they cost in terms of money and opportunity, and how will you recover?
Board / Staff: what skills and relationships are on the "team" that ensures success?	Management Team: Who is on your team, including staff, volunteers, outside experts, and professional service providers? Do they inspire confidence in your future success?
Organizational Budget: What are your anticipated revenues and expenses for the coming year; where will the revenues come from and what will the specific expenses be?	Financial Projections (P&L, Balance Sheet, P&L for each "line") and Assumptions: Projections should include 3-5 years in the future, with adjustment factors included.

Use this table (also more briefly presented in the Definitions section) to compare your planning documents to the typical components expected in a Strategic Plan or a Business Plan.

8. Basic User Information for Online Application

<u>NAVIGATING THE APPLICATION</u> | <u>GENERAL FORMATTING INSTRUCTIONS</u>
<u>FORMATTING YOUR GOALS, PLANS</u> | <u>USER ID/PASSWORD</u>
<u>PRINTING THE APPLICATION</u> | <u>SAVING, EDITING</u> | <u>INTERIM REPORT</u>
<u>UPLOADING ATTACHMENTS</u> | <u>SUBMITTING YOUR APPLICATION</u> | <u>DEADLINES</u>

a. Navigating the Online Application

Once you have logged into the online application using the link e-mailed to you by CCHD, you will see a tool bar at the top of the page with four links: *Exit, Sample Documents, CCHD Criteria & Guidelines*, and *Contact Us* (described below). Once you click on a link, a new page or window will open. To close the new window, click on the X in the top right hand corner of the page. *Do not close the application.*

> **Exit** – Allows you to exit the application **WITHOUT** saving data. Use this carefully, as any work you have done will **NOT** be saved.

> **Sample Documents** – Opens a new Web page with downloadable forms for the Application Budget, Board Member Profiles and Listing of Institutional or Coalition Membership (Community Development Grants only). These forms must be completed for the respective application. Additional required attachments will be outlined on the final page of the online application.

> **CCHD Criteria and Guidelines** – Opens a new Web page with information about CCHD's funding criteria.

> **Contact Us** – Allows you to send an e-mail to a CCHD support staff person with questions about the application.

Below the toolbar, you will see links to each page of the application, as well as links to

> *Review My Application* – Allows the system to review your application responses to make sure all required fields are completed.

> *Printer-Friendly Version* – Opens up a new window with a printable version of the document.

At the bottom of some pages, you will find buttons for
> *Save & Finish Later* – Save a draft of your work that you can return to later.

> *Next* – Continue to the next page of the application.

Review & Submit – Review your application in its entirety, determine if any required fields have not been completed, and submit your application to CCHD.

⚠️ **NEVER use the back and forward buttons on your Web browser to move through the application—use the page links at the top of the application, or the "Next" button at the bottom of the application.**

Save your document regularly as you go—avoid being "timed out" and losing your work. If you stop working on the application briefly, or get distracted by other tasks, be sure to save your work. Use the "Save and Finish Later" button often, to save your changes to the application.

Back to *Basic User Information*

b. General Formatting Instructions

Your written responses should be as clear and concise as possible. There are length limitations for some fields. We recommend that you use Microsoft Word or a similar word processing program to draft the narrative responses to application questions (e.g., organization description, initiative description, goals, etc.). Once your narrative responses are drafted, you can cut and paste them into the online application. You may also want to use the spell check function in your word processing program prior to pasting responses into the application.

Please use plain text only—the online application software will not recognize bold, underlining, italics, or other font formatting. You may use quotation marks, numbered lists, apostrophes, parentheses, and hard returns. Tables or text boxes cannot be pasted into the response boxes.

Back to *Basic User Information*

c. Formatting Goals and Implementation Plans

The Community Development full application requires a thorough narrative description of your organization's goals for the following four areas: 1) institutional change, 2) leadership development, 3) organizational development, and 4) financial capacity/fundraising.

You must use the following format in the application to outline goals, strategies, and related activities (including a timeline) for each of the four areas:

Goal: What concrete policy/structure is the group working to change or what leadership/ organizational development goal is the group trying to achieve?

Strategy: What strategy will be used to accomplish this goal?

Activities/Tasks: What specific activities and tasks need to happen and when do these tasks need to happen in order to carry out the strategy and achieve the stated goal?

d. Your User ID and Password

You will receive an e-mail from CCHD with a link to the online application account login page. You will need to enter your e-mail address and create a password (minimum of five characters). **Please note your login page and password for future reference.** If you forget your password, click the "Forgot your password" link and your password, your account login information, and a link to access your saved application will be e-mailed to you.

e. Printing Your Application

If you would like to print out the online application before, during, or after submission, use the "Printer Friendly Version" link at the top right-hand corner of the page.

Back to *Basic User Information*

f. Saving and Editing Your Application

As you are completing your online application, you may save your work at any time and complete it later, by using the "Save and Finish Later" button at the bottom of each page. To access your saved application, you must use the link that CCHD sent to you in the original e-mail invitation to submit an application. You may want to bookmark this link for future reference.

Back to *Basic User Information*

g. Interim Report

For those groups that are submitting a combined Refund Application and Interim Report, the Interim Report shows progress on your last year's organizational grant goals for low-income control, institutional change, leadership development, organizational development and fundraising/financial capacity. For all evaluators to assess your organization's progress on your grant from the previous year, you must restate your goals *from the previous year*. Please **do not confuse these goals** with the proposed goals your organization has stated for the **coming** grant year. They may be slightly or very different.

h. Uploading Attachments

All full applications require that you submit attachments. The final page of the application will indicate which are required and guide you through the process. Click on the "Sample Documents" link at the top left of the page to access and download attachment forms. You will be directed to a Web page where you can download the appropriate forms (if applicable) to be completed. Attachment forms include the budget and board profiles, among others.

i. Submitting Your Application

Once you have completed your application, reviewed it, and uploaded the required attachments, use the "Review and Finish Later" button at the bottom of the page to submit your application to CCHD. **(We recommend you print a hard copy to keep for your files.)** CCHD will not be able to view your application until it is submitted.

You will not be able to edit your application once it has been submitted.
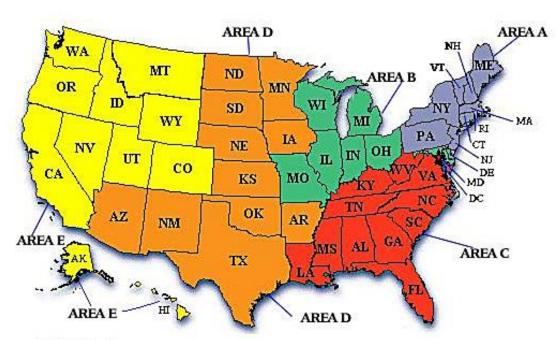
j. Deadlines

The deadline for submitting a pre-application is 11:59 pm EST on November 1st. Full applications must be submitted by 11:59 pm EST on the due date (December 1 for Refund Applications, and December 15 for new Full Applications). You will receive an automatic confirmation upon submission of an online application.

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9. How to Contact CCHD for Help

If you are not able to find the answers to your questions within this guide please contact the local diocesan director found on the CCHD Grants Web site, or contact the grant specialist for your area.

Division of Areas

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Area B (Midwest, MD & DE)
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