Catholic Campaign for Human Development
Application Evaluation and Site Visit Guide
Revised June 2025

Contents

I.   Overview

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

- recommendations for reviewing an EDI plan

- copies of the online evaluation forms that can be shared with local committee members

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Please Note:

CCHD asks that for each pending proposal from their diocese, diocesan directors, at a minimum:

- complete the online Evaluation Form(s)

- 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.

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 2–3 weeks in advance** to propose a site visit. Offer 2–3 date/time options that work for you and any local committee members joining.
- Consider applicant availability: **Evenings** often work better for community leaders with day jobs.
- **Agree on the visit length**. 60–90 minutes is typically sufficient.
- **Clarify the meeting location.** It's ideal to meet at the organization office or community space, but a parish or café can also work. Aim for a relaxed, respectful atmosphere.
- **Explain the purpose of the visit:** to build relationships, better understand the application, and observe how the group meets CCHD's mission and guidelines.

Special Note: Multi-Diocesan Applications

- For **multi-diocesan applications**, all diocesan directors involved should review the application.
- The **primary diocese** (where the applicant is based or most active) coordinates the visit. Secondary dioceses are those dioceses where the applicant is active on a smaller scale. Secondary dioceses can:
  - Join the main site visit (coordinated with the primary diocese), OR
  - Arrange a separate conversation with local staff or community leaders.

Identify the Participants

- Request that the applicant include:
  - At least **two low-income members** involved in leadership,
  - A **board member**, and
  - The **executive director or key staff**.
- Let the applicant know who from your diocesan team will attend yourself, local committee members, and/or others.

2. Preparing for the Visit

Reviewing the Application Prior to the Visit

- Read the full application and, if available, the **national grants staff evaluation** in advance.
- Consult the following tools:
  - **Key Definitions** (Attachment 1)
  - For Community Development applications, **Checklist of Critical Evaluation Points** (Attachment 2)
  - For Economic Development Initiatives (EDI), see **EDI Plan Review Considerations** (Attachment 3)
- Identify areas needing clarification or where key information is missing.

Preparing Your Site Visit Questions

- Based on your review of the application and, if available, that of the national staff, identify the key questions you have for the organization. Remember that you will have limited time.

- Prepare **open-ended questions** that allow leaders to share their experiences, challenges, and hopes.
  - Prioritize your questions to stay within the available time.
  - Assign different questions to team members in advance.
- These questions are designed to guide conversation during the site visit and ensure alignment with the goals of the CCHD grant. Use them flexibly — not all questions need to be asked verbatim. The most important thing is to understand how the group builds leadership, organizes for change, and sustains its efforts.
  - **Leadership Development**
    - "From your participation in this organization, what have you learned about yourself?" *(Ask this of leaders.)*
    - "What kinds of training or support have leaders received? What skills have they developed?" *(Ask staff and leaders.)*
  - **Organizational Development**
    - "What roles do members and leaders play in helping to grow the organization's capacity, influence, or visibility?" *(Ask leaders.)*
    - "Is your membership growing? Do you have a plan to strengthen or expand it?" *(Ask staff and leaders. For Community Development applicants especially.)*
  - **Institutional Change**
    - "What change is your organization trying to make in your community — and how are you building power to make that happen?" *(Ask staff or leaders.)*
    - "What issue campaign accomplishment are you most proud of?" *(Ask leaders.)*
    - *If the group is early in their work:* "How is your current organizing positioning you to address issues in the next year?" *(Ask staff and leaders.)*
  - **Financial Capacity**
    - "How would you describe the financial health of your organization? What are some successes and challenges?" *(Ask staff or board members.)*
    - "What role do staff, board, or leaders play in raising money to support the organization?" *(Ask staff and/or leaders.)*

3. **Conducting the Site Visit**

Begin with Brief Introductions
- Start by introducing yourself and sharing your role with CCHD and the local diocese.
- Invite all staff and leaders present to introduce themselves.

Share information about CCHD and the social mission of the Church
- Take a moment to explain **why the Catholic Church supports this work**: CCHD is the domestic anti-poverty program of the U.S. bishops, supported through an annual second collection in parishes across the country.
- Emphasize that this support is grounded in **Catholic social and moral teaching** — a consistent moral framework that:
  - Respects the life and dignity of every person;
  - Upholds the importance of marriage and family life;

- o Promotes social and economic justice;
- o Seeks the common good and peace.
- o If relevant to the organization's activities, clarify that **CCHD does not fund work that conflicts with Church teaching**, including:
  - o Partisan political activity;
  - o Support for abortion, same-sex marriage, euthanasia, racism;
  - o Support for the death penalty or harsh anti-immigrant policies.
- o Applicant organizations frequently have questions about their chances for funding or when decisions will be made. Briefly outline the next steps and timing:
  - o Applications are reviewed over the summer and fall;
  - o Final funding decisions are made by the CCHD Subcommittee of Bishops in **November**.

Listen to and Engage the Leaders
- o Begin with some of your more open-ended questions. Allow leaders to tell their stories. Many leaders will have a prepared narrative or remarks, give space for that.
- o Save more specific or technical questions for later in the visit. Keep the tone conversational rather than scripted, but be sure to cover all key areas.
- o Pay attention to who is speaking:
  - o Are leaders confident and active participants?
  - o Are staff allowing space for leaders to engage?
  - o Is anyone dominating or withdrawing?
- o Be sure to leave time for the organization to ask you questions.

Reflect on the Site Visit
- o After the visit, take time to reflect as a group on what you heard and observed.
- o Be objective. Use your site visit notes to assess how well the organization meets the key criteria.
- o Consider not just where the group is today, but whether it shows **readiness, potential, and alignment** with CCHD's mission.
- o Remember: CCHD supports groups at many stages of development, not just fully formed organizations.

III. Evaluation and Recommendation

1. **Complete the Diocesan Evaluation Form**
   - o If members of the local committee are helping to complete the evaluation, the Diocesan Director may share a copy of the online Diocesan Evaluation Form with them (see Attachments 4 and 5), either in hard copy or as a Word document.
   - o Once committee input has been collected, the Diocesan Director is responsible for submitting the final evaluation online. Responses from committee members may be cut and pasted into the online form for ease of submission.

2. **Prioritizing Your Diocesan Requests**
   - o The demand for CCHD funding often exceeds available resources. As a result, and coupled with our efforts to be good stewards, **not all eligible or well-reviewed applications will be**

submitted for approval to the CCHD Subcommittee, and even strong proposals may go unfunded in a given year.

- o For dioceses submitting more than one application, it is especially important to help guide the national discernment process by identifying local funding priorities. After completing site visits and evaluations, the Diocesan Director—ideally in consultation with the local committee—should determine **a ranked list of diocesan applications**.
- o This list should be shared during the dialogue with CCHD Grants Staff. It will help inform the national review and assist in making difficult decisions when it becomes necessary to **reduce the number of proposals recommended to the Subcommittee in November.**
- o In some cases, **one or more—or even all—applications from a diocese may not be recommended for funding**. If this occurs, CCHD National Grants Staff will notify the Diocesan Director by early October.

IV. Dialogue with National Staff

Following your local application reviews, you will meet with National Staff to discuss your respective evaluations and decide whether or not to recommend the proposal(s) from your diocese for funding. During the review process, National Staff will share more information about scheduling dialogues. Here are a few things to keep in mind as you prepare for these dialogues.

1. **Consider the fundability of each proposal**

   - o Is the proposal ready for national funding or, in the case of renewal applications, is the group making sufficient progress in realizing the institutional change goals outlined in their proposal?

2. **Suggested amount for each fundable proposal**

   - o Prepare a range in which you'd like to see each proposal funded, i.e. - $25,000 to $35,000, etc. Preparing a range allows your CCHD National Grants Staff to adjust funding levels as necessitated by factors including the amount of funding available this year, the level of poverty in each diocese, and any significant demographic changes in an area or diocese.
   - o For the 2026 grant year, **the ceiling for funding is $50,000**.

3. **Disagreements over fundability of priority projects will go to the USCCB/CCHD Bishops subcommittee**

   - o If you and your National Grants Staff are unable to reach consensus on a particular proposal, the **CCHD Director will review both recommendations and determine** whether the Diocesan Director's recommendation will be shared with the CCHD Subcommittee. In such cases, the Subcommittee may review both perspectives as part of its decision-making process.

4. **Obtain the Bishop's approval**

   - o After the dialogue is complete, you will receive a summary report from CCHD Staff with our joint recommendation and the appropriate Bishop Support Form. Print and complete one form for each proposal from your diocese, and present to the (arch)bishop for his review and signature. This step should be done *after* your dialogue with CCHD national staff.

- These should be returned as soon as possible to the CCHD National Office via email to cchdgrants@usccb.org.

V. After the Dialogue

Following the completion of the dialogue process, CCHD Staff will begin the process of developing the set of proposals which will be submitted to the USCCB's Subcommittee on CCHD for its review and decision in November. This set of proposals is referred to as the "docket."

In developing the docket, CCHD Staff will consider the following factors:

1. The **amount of funding available** for grants this year.

2. The **recommendation of diocesan directors** and the priorities articulated in the dialogue process.

3. The **number of renewal applications**. In cases where performance is an issue, it is CCHD policy to consider the potential for working with a group to improve performance prior to deciding not to fund again. This does not rule out the possibility that a renewal application will be declined; rather, it is the expression of CCHD's preference for working relationally to increase capacity.

4. CCHD looks at groups funded for at least six years as **sustained funding**. When these groups return, they are generally funded at a somewhat lower level when compared to groups that are in the start-up phases.

5. CCHD has set a **ceiling of $50,000** for recommended grants in the 2026 grant cycle.

Attachment No. 1:
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 people. Members of the organization who come from the local community and/or geographical area being empowered should also be included. 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 people 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 its grantmaking. 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 focuses 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 new jobs that pay a living wage with benefits as determined by regional standards, and/or
- EDIs must develop asset ownership for individuals or families while also benefiting the larger community.

CCHD's Economic Development 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.

Attachment No. 2:
Checklist of Critical Evaluation Points
for Community Development Evaluations

This checklist is intended as a supplemental guide to support Diocesan Directors in reviewing CCHD applications. It reflects key values and review considerations used by the national office and may assist you as you complete your evaluation form. **It is not a required form and does not need to be submitted.**

- o Priority for the Poor/Beneficiaries:
  - √ Are at least 50% of the beneficiaries low-income?
  - √ 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?

- o 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 renewal applications: have they made reasonable progress on their previous year's goals?

- o 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 renewal applications: have they made reasonable and measurable progress on their previous year's goals?

o 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 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 renewal applications: have they made reasonable progress on their previous year's goals?

o 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 do they provide?

√ How long have they worked with the technical assistance provider or trainer?

o Fundraising and Financial Capacity:

√ Does the organization have a variety of financial sources? Is there evidence of a fundraising 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 renewal applications: have they made reasonable progress on their previous year's goals?

Attachment No. 3:
Economic Development Institution
Plan Review Considerations

These considerations are intended as a supplemental guide to support Diocesan Directors in reviewing CCHD applications. It reflects key values and review considerations used by the national office and may assist you as you complete your evaluation form. **It is not a required form and does not need to be submitted.**

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 are 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 and training.

I. Eligibility Checklist

Please answer each question. A "No" response may disqualify the application or require further follow-up.

Note: Applicants affirmed these criteria in the Eligibility Quiz prior to accessing the application. Reviewers should confirm that responses remain accurate based on the application, supplemental materials, and any additional due diligence (e.g., web review, site visit).

Eligibility Criteria	Yes / No	Notes
Does the organization demonstrate that at least 50% of its board or decision-making body are low-income individuals, based on HUD income guidelines?		
Does the applicant clearly identify low-income individuals as the primary participants and leaders of the organization?		
Is the organization free of prohibited partisan political activity?		
Has the applicant affirmed alignment with Catholic moral and social teaching?		

II. Evaluation Criteria

Score each section from 1 to 5 and briefly respond to the guiding questions.
5 = Excellent, 4 = Strong, 3 = Adequate, 2 = Weak, 1 = Inadequate

Please limit comments to 3-5 sentences unless significant concerns are noted.

1. Organizational Identity & Mission

How clearly does the applicant describe its history, mission, and community base? Does the organization focus on empowering low-income communities through long-term systemic change?

Score (1–5): _____
Comments:

2. Low-Income Leadership & Participation

Are people living in poverty the primary voice in decision-making and governance? Does the applicant meet the 50% board threshold and demonstrate meaningful inclusion?

Score (1–5): _____
Comments:

3. Catholic Participation

Are Catholic individuals, parishes, or diocesan leaders engaged in or supportive of the organization's work?

Score (1–5): _____
Comments:

4. Leadership Development

Does the applicant support ongoing leadership development for low-income members? Are there programs or strategies for skill-building, social analysis, organizing, or governance?

Score (1–5): _____
Comments:

5. Institutional Change

Does the applicant work toward changing unjust systems, policies, or power structures in the community? Are the strategies aimed at long-term change, not just short-term service?

Score (1–5): _____
Comments:

6. Community Engagement & Coalitions

Is the organization rooted in a specific community or constituency? Does it collaborate with other groups to build power or advance shared goals?

Score (1–5): _____
Comments:

7. Financial Capacity

Does the organization demonstrate sound financial health and the capacity to responsibly manage CCHD funds? Review submitted financials (e.g., budgets, audits, 990s) for evidence of stability, responsible stewardship, and planning.

Score (1–5): _____
Comments:

8. Organizational Capacity

Does the organization demonstrate adequate staffing, leadership, and governance to carry out its mission and proposed activities? Consider roles, structure, and organizational planning.

Score (1–5): _____
Comments:

9. Use of Funds & Mission Fit

Does the proposed use of funds align with CCHD's mission and Catholic Social Teaching, especially subsidiarity, solidarity, and the option for the poor, with a focus on human development and structural change?

Score (1–5): _____
Comments:

10. Catholic Identity & Moral Teaching

To what extent does the organization's work embody or promote Catholic moral and social teaching (CST)? Are there any activities or affiliations that may raise concern or require further clarification?

Score (1–5): _____

CST Principles: Select the CST principles that the organization's mission, activities, or approach most directly reflect. Consider both the organization's mission, stated goals, and its activities.

- Life and Dignity of the Human Person
- Call to Family, Community, and Participation
- Rights and Responsibilities
- Option for the Poor and Vulnerable
- The Dignity of Work and the Rights of Workers
- Solidarity
- Subsidiarity
- Care for God's Creation

Comments:

11. Nonpartisan Activity

Is there any indication of prohibited partisan activity? Do affiliations, partnerships, or relationships raise concern or need follow-up in light of CCHD's nonpartisan guidelines? (*Use the scale to reflect the degree of concern, not automatic disqualification.*)

Score (1–5): _____
Comments:

III. Overall Recommendation

☐ Highly Recommend
☐ Recommend with Questions
☐ Recommend with Conditions
☐ Do Not Recommend

Suggested Funding Amount: $_____

Overall Comments & Rationale:

Suggested Conditions (if any):

Economic Development Evaluation Form
Revised June 2025

I. Eligibility Checklist

Please answer each question. A "No" response may disqualify the application or require further follow-up.

Note: Applicants affirmed these criteria in the Eligibility Quiz prior to accessing the application. Reviewers should confirm that responses remain accurate based on the application, supplemental materials, and any additional due diligence (e.g., web review, site visit).

Eligibility Criteria	Yes / No	Notes
Does the organization demonstrate that at least 33% of its board and governing body are low-income individuals, based on HUD income guidelines?		
Has the applicant submitted a complete and realistic business plan for the EDI?		
Has the organization clearly identified matching funds and provided a viable strategy to meet the requirement?		
Is the organization free of prohibited partisan political activity?		
Has the applicant affirmed alignment with Catholic moral and social teaching?		

II. Evaluation Criteria

Score each section from 1 to 5 and briefly respond to the guiding questions.
5 = Excellent, 4 = Strong, 3 = Adequate, 2 = Weak, 1 = Inadequate

Please limit comments to 3-5 sentences unless significant concerns are noted.

1. Organizational Identity & EDI Overview

How clearly does the applicant describe the history and mission of both the parent nonprofit (if applicable) and the Economic Development Initiative (EDI)? Is the EDI's structure well-defined and aligned with community ownership and long-term impact?

Score (1–5): _____
Comments:

2. Catholic Participation

Are Catholic individuals, parishes, or diocesan leaders actively engaged in or supportive of the EDI?

Score (1–5): _____
Comments:

3. Low-Income Participation & Control

Do low-income individuals make up at least one-third of the planning and decision-making roles within the EDI? Is their leadership meaningful and supported?

Score (1–5): _____
Comments:

4. Financial Capacity

Does the organization or EDI demonstrate financial sustainability and readiness to manage grant funds effectively? Review financial documents and the EDI's financial strategy for clarity, diversification of revenue, and risk management.

Score (1–5): _____
Comments:

5. Organizational Capacity

Does the organization have the staffing, leadership, and governance needed to successfully implement and sustain the EDI? Assess internal capacity, structure, and operational readiness.

Score (1–5): _____
Comments:

6. Leadership Development

Are there systems or practices in place for leadership development, especially among low-income participants or EDI members?

Score (1–5): _____
Comments:

7. Strategy for Job Creation and Asset Development

Will the EDI create good jobs or build assets owned and governed by the community? Are the projections realistic?

Score (1–5): _____
Comments:

8. Community Engagement & Partnerships

Is the EDI rooted in and responsive to its local community? Are there strong partnerships or coalitions supporting its work?

Score (1–5): _____
Comments:

9. Use of Funds & Mission Fit

Does the proposed use of funds align with CCHD's mission and Catholic Social Teaching, especially solidarity, subsidiarity, the option for the poor, and the dignity of work, with a focus on human development and structural change?

Score (1–5): _____
Comments:

10. Catholic Identity & Moral Teaching

To what extent does the organization's work embody or promote Catholic moral and social teaching? Are there any activities or affiliations that may raise concern or require further clarification?

Score (1–5): _____

CST Principles: Select the CST principles that the organization's mission, activities, or approach most directly reflect. Consider both the organization's mission, stated goals, and its activities.

- Life and Dignity of the Human Person
- Call to Family, Community, and Participation
- Rights and Responsibilities
- Option for the Poor and Vulnerable
- The Dignity of Work and the Rights of Workers
- Solidarity
- Subsidiarity
- Care for God's Creation

Comments:

11. Nonpartisan Activity

Is there any indication of prohibited partisan activity? Do affiliations, partnerships, or relationships raise concern or need follow-up in light of CCHD's nonpartisan guidelines?
(Use the scale to reflect the degree of concern, not automatic disqualification.)

Score (1–5): _____
Comments:

III. Overall Recommendation

☐ Highly Recommend
☐ Recommend with Questions
☐ Recommend with Conditions
☐ Do Not Recommend

Suggested Funding Amount: $_____

Overall Comments & Rationale:

Suggested Conditions (if any):