

Review - (21161) Community Devel. Evaluation for Diocesan Directors	
<b>Review</b>	
Acceptance Due Date	1/31/2019
Due Date	3/31/2019
Visible From	
Visible To	
<b>Applicant</b>	
Organization Name	Worcester Interfaith
Street Address	111 Park Avenue Worcester, MA 01609
Request Primary Contact Name	Gonzalez-Webster, Ms. Isabel
Office Phones	Tel: (774) 242-2691 Fax: (508) 754-5001
E-mail	worcester.interfaith@gmail.com
<b>Request</b>	
Requested Amount	50,000.00
Project Description	Funding from CCHD will support the work of our Lead Organizer, some of the expenses related to the work we do, and some of the expense related to our book-keeping and development operations. In the coming year, we will continue to focus on issue work – jobs for youth and adults, affordable housing, and the disproportionate number of students of color who are disciplined in the Worcester Public Schools. Organizationally, we will continue to help Isabel transition, revisit our dues and membership structures, strengthen and expand our membership and board, and engage a greater number of diverse congregations and congregations of color in our work. We are also going to bring the Ten Year Agenda to Worcester.
Recommended Amount	0.00
Program Area	ECONOMIC DEVELOPMENT;YOUTH ORGANIZING;HOUSING
Geographical Area Served	AREA A\Massachusetts\Worcester
<b>Reference</b>	
Staff	IMITCHELL
ID, Reference No	931059
<b>Evaluation</b>	
Numeric Grade	0
Suggested Amount	\$0.00
Response Code	0
Priority for the Poor and Organizational Membership	
Institutional Change	
Leadership Development	
Organizational Development	
Financial Capacity	

<b>Catholic Moral Teaching</b>
<b>USCCB Priorities</b>
<b>Catholic Participation</b>
<b>Nonpartisan Activity</b>
<b>Suggested Follow-Up Questions or Points Needing Clarification</b>
<b>Additional Comments</b>
<b>Recommended Grant Conditions</b>

# **WORCESTER INTERFAITH 2019 BUDGET**

<b>INCOME</b>	
Member Dues	\$ 10,000.00
Grassroots Fundraising (fundraising event - gross)	\$ 20,000.00
Private and Corporate Foundation Grants, including CCHD	\$ 111,000.00
Individuals/grassroots fundraising	\$ 5,000.00
In-kind contribution - rent	\$ 2,000.00
<b>TOTAL INCOME</b>	<b>\$ 148,000.00</b>
<b>EXPENSES</b>	
<i>A. Personnel and Salaries</i>	
1) Director and Lead Organizer	\$ 75,000.00
<i>B. Fringe, Taxes, Pension</i>	
Medical Reimbursement	\$ 8,000.00
Pension Contribution	\$ 7,500.00
MA Employment Tax	\$ 1,000.00
Payroll Tax	\$ 8,000.00
<i>C. Office Expenses</i>	
Telephone and Internet	\$ 1,500.00
Supplies	\$ 575.00
Filing Fees	\$ 200.00
Workman's comp. insurance	\$ 300.00
<i>D. Occupancy Expenses</i>	
Rent	\$ 2,000.00
Maintenance	\$ 150.00
<i>E. Travel Expenses</i>	
Travel allowance	\$ 2,000.00
<i>F. Program Expenses</i>	
Copy/print	\$ 200.00
Postage	\$ 100.00
Conference/training	\$ 500.00
Subscriptions	\$ 350.00
Supervision/membership	\$ 2,000.00
Local meetings	\$ 2,500.00
<i>G. Outside Services</i>	
Book-keeping services	\$ 5,000.00
Fundraising services	\$ 23,000.00
<i>H. Other</i>	
Depreciation	\$ 200.00
Fundraiser Expense	\$ 5,000.00
<b>TOTAL EXPENSES</b>	<b>\$ 145,075.00</b>
<b>TOTAL REVENUE</b>	<b>\$ 148,000.00</b>
<b>Deficit</b>	<b>\$ 2,925.00</b>

2019 Funders	Avg of grant amount over past 5 years	
RESIST	new funder	
Albert Rice	new funder	
Haymarket	new funder	
Episcopal City Mission - Burgess Fund	new funder	
CCHD	\$	40,000.00
Greater Worc Cmty Fndtn	\$	10,000.00
Zakim	\$	10,000.00
Daniels	\$	7,500.00
People's United Cmty Foundation	\$	5,000.00
Fletcher	\$	5,000.00
Stoddard	\$	5,000.00
MA Woman's Home Missionary Union	\$	5,000.00
TJX Foundation	\$	5,000.00
GWCF - YCI (episodic)	\$	4,000.00
Hoche-Scofield	\$	3,000.00
ELCA (Evangelical Lutheran Church in America)	\$	2,000.00
Schwartz	\$	2,500.00
Bay State Savings (every other year, odd years)	\$	2,000.00
Webster 5	\$	1,000.00
Unibank	\$	1,000.00
Berkshire Bank (formerly Commerce)	\$	1,000.00
Cornerstone Bank	\$	1,000.00
Price Chopper	\$	500.00
Country Bank	\$	500.00
Millbury Savings	\$	100.00
Alden Trust (episodic)	\$	111,100.00

asked for \$5,000

asked for \$10,000

new amount

used to give \$5,000/year, but  
we got rejected this year - need  
to talk to Sandra Johnson

\$12,000 - \$15,000 at year-end



## Board Member Profiles

Please list members of the organizational Board of Directors and give a brief description of each. **Include information about the person's occupation and volunteer experience, ethnic/racial background, and special skills or knowledge they bring to the organization.** You may add additional names as necessary. Keep in mind that individuals who are voluntarily low-income (students, and Americorps, VISTA, or JVC volunteers) **should not** be listed here as low-income. When determining whether a board member is low-income, use the definition included in the narrative portion of your proposal.

As a result of the Review & Renewal, CCHD will consider priests and religious who primarily serve low-income people, parishes and communities and live in solidarity with their people in those communities as low-income. However, a board or organization made up exclusively or primarily of clergy and religious would not be considered a low-income board or organization.

**Organization:** Worcester Interfaith

<b>Name</b>	Rev. Jose Encarnacion - President	This board member is low-income*	<input type="checkbox"/> Yes	
<b>Address</b>	Iglesia Cristiana de la Comunidad			
<b>City, State ZIP</b>	Worcester MA 01603	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>	<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>				
Rev. Jose Encarnacion is from Puerto Rico. He and his wife have 6 children, most of whom are adopted. Jose and his wife – who serves as a city councilor – run the Iglesia Cristiana de la Comunidad, a community-based church. Jose also has an active prison ministry.				
<b>Name</b>	Mr. Gary McConnell - Treasurer	This board member is low-income*	<input type="checkbox"/> Yes	
<b>Address</b>	First Presbyterian Church			
<b>City, State ZIP</b>	Worcester, MA 01605	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>	<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>				
Gary is a long-standing member of Worcester Interfaith. He worked at a large insurance company for most of his life, volunteering as our treasurer for many years. Once his term is complete on May 30, 2019, Gary will be retiring.				
<b>Name</b>	Mr. James Bonds - Secretary	This board member is low-income*	<input checked="" type="checkbox"/> Yes	
<b>Address</b>	Emmanuel Baptist Church			
<b>City, State ZIP</b>	Worcester MA 01610	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>	<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>				
James is African-American and has been an active leader in Worcester Interfaith for many years. For many years, he ran a small business, but had to close it after the economic downturn in 2009.				

<b>Name</b>	Mr. James Borque	This board member is low-income*	<input checked="" type="checkbox"/> Yes
<b>Address</b>	All Saints Episcopal Church		
<b>City, State ZIP</b>	Worcester, MA 01608x	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>
			<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>			
James is a retired social worker. Until recently, he worked for Wheelock School of Social Work, but lost his job when Boston University bought Wheelock.			

<b>Name</b>	Rev. Clyde Talley	This board member is low-income*	<input type="checkbox"/> Yes
<b>Address</b>	Belmont AME Zion Church		
<b>City, State ZIP</b>	Worcester, MA 01610	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>
			<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>			
Rev. Talley is an African-American man, and serves as pastor to a low-income congregation located in Main South, one of Worcester's poorest neighborhoods.			

<b>Name</b>	Rev. Richard Trainor	This board member is low-income*	<input type="checkbox"/> Yes
<b>Address</b>	Blessed Sacrament RC Church		
<b>City, State ZIP</b>	Worcester, MA 01602	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>
			<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>			
Rev. Richard Trainor is a white male, leading the congregation of Blessed Sacrament. He has been involved with Worcester Interfaith for many year and is one of our key leaders.			

<b>Name</b>	Mr. Martin Kelly	This board member is low-income*	<input type="checkbox"/> Yes
<b>Address</b>	Chaplain's Office, College of the Holy Cross		
<b>City, State ZIP</b>	Worcester, MA 01610	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>
			<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>			
Marty oversees the student community service program at Holy Cross and has long been an ally of Worcester Interfaith. Marty helped secure the new Holy Cross Contemplative Center for our strategic planning retreat.			

Name	Ann Burgdorf	This board member is low-income*	<input type="checkbox"/> Yes
Address	Concordia Lutheran Church		
City, State ZIP	Worcester, MA 01610	This board member was (mark one)	<input type="checkbox"/> <i>Appointed</i>
			<input checked="" type="checkbox"/> <i>Elected</i>
<b>Description</b>			
Rev. Burgdorf is minister of a church in a low-income neighborhood. They run an after-school program and are very active in terms of helping refugees get resettled.			

Other board members:

Rabbi Aviva Fellman, Congregation Beth Israel Worcester 01602

Played a key role in the strategic/succession planning process. Aviva is a progressive Rabbi of a conservative congregation. She does a great job of educating them on the issues.

Rev. Brent Newberry, First Baptist Church Worcester 01609

Brent is relatively new to Worcester. His church houses the Worcester Interfaith office free of charge. Brent and his staff are very supportive of our work.

Rev. Sarah Stewart, First Unitarian Church Worcester 01608

Sarah is relatively new to Worcester and Worcester Interfaith. Through the strategic and succession planning process, she has increased her participation and leadership. Sarah's congregation is located downtown and is very active, providing activities like family yoga, etc.

Rev. Kevin Downer, Greendale People's Church

Kevin is new to Worcester and has only recently started coming to Worcester Interfaith board meetings. We look forward to getting to know him better.

Rev. Roberto Ochoa, Lakeview Congregational Church Worcester 01604

Until recently, Roberto is a Hispanic male who was leading a small congregation on the East Side of Worcester. Roberto just moved to Ohio to take on a larger congregation. His successor has not yet been selected.

Rev. Oscar Amparo, Ministirios La Trinidad Worcester 01610

Oscar is an African-American man, leading a small non-traditional congregation of color in the Main South neighborhood, one of Worcester's poorest. The congregation speaks Portuguese.

Rev. Esau Vance, Mt. Olive Pentecostal Church Worcester 01609

Rev. Vance is an African-American man leading a Pentecostal congregation of color.

Rev. David Gentleman, New Cana Church 01605

David is a white male leading a non-traditional religious congregation. They use the chapel at the Greendale People's Church for their worship services.

Ms. Sheilah Dooley, Pernet Family Health Service Worcester 01610

Sheilah has served as the Executive Director of the Pernet Family Health Service center for many years. Founded by Little Sisters of the Assumption, Pernet serves some of Worcester's neediest families.

Rev. Mark Nilson, Salem Covenant Church Worcester 01606



Salem Covenant Church used to be the Swedish Evangelical Church, but has since become a Congregational Church. Salem Covenant hosts interfaith events on a regular basis.

Rev. Jose Perez, Rock of Salvation Church Worcester MA 01610

Jose is a Hispanic male who works full-time for a union and part-time as a minister, serving his Hispanic congregants. He played a key role in the strategic and succession planning process and is likely to be the next President of Worcester Interfaith. Jose is of low-income status.

Rabbi Valerie Cohen, Temple Sinai Worcester 01602

Valerie is relatively new to Worcester and spent her 1<sup>st</sup> two years in service merging the two reformed synagogues. As she emerges from these tremulous waters, she has been more active in Worcester Interfaith activities.

Rev. Nathan Pipho, Trinity Lutheran Church Worcester 01609

Nathan was the Associate Pastor at Trinity Lutheran, but took the helm when the Pastor retired. His congregation runs an after-school program for middle school aged youth. Nathan was a key leader in the strategic and succession planning process.

Rev. Aaron Payson, Unitarian Universalist Church Worcester 01605

Aaron is very active in the Worcester Community. He and his congregants are actively engaged on issues of gun violence, homelessness and other social problems. Aaron played a central role in the strategic and succession planning process.

Rev. Nancy Elder-Wilfred, United Congregational Church Worcester 01609

Nancy's been a pastor at UCC since 2011. Her building serves as a hub for several local nonprofits.

Rev. Shandirai Mawokomatanda, Wesley United Methodist Church Worcester 01608

Located downtown, Wesley United is a multicultural congregation. They serve a large number of Ghanaians – so many that they have a Ghanaian choir. Their early morning service is more traditional, whereas the 10:30 service is multicultural.

Ms Jane Cutting, Worcester Friends Meeting Worcester 01602

Jane is relatively new to Worcester Interfaith. She's quiet, but asks good questions and makes astute observations. Jane is of low-income status.

Imam Asif Hirani, Worcester Islamic Center Worcester 01606

Asif is the new Imam at the Worcester Islamic Center and is becoming more active in Worcester Interfaith.



### **Notes from the June 20, 2018 Board Meeting**

**Present:** Jim Borque (all Saints) Tim Lilenthal (Faith in Action), Rev. Richard Trainor (Blessed Sacrament) Rev. Nathan Piphio (Trinity Lutheran), Rev. Sarah Stewart (First Unitarian) Clarence Barley, Mary Chaina, Jane Cutting and Virginia Swain (Quakers), Sarah Lange, Frank Kartheiser.

1. Welcome & Prayer
2. Current financial position – YTD financials (please see handout)
  - 2018 grants (please see handout)
  - 2018 budget (please see handout)
  - 2019 budget (this is something we will need to work on, starting this fall)
3. Update on hiring process (please see handout)
4. Update on issue work (Frank)
  - a. Raise Up MA -- negotiations around Paid Family Leave, minimum wage going on @ State House as we speak. On 6/26, Frank is going to a meeting @ State House. We may still put issues on the ballot, because there's been push-back from retailers.
  - b. Worcester Community Labor Coalition continues to promote pre-apprenticeships and apprenticeships for the building trades.
  - c. Youth Jobs- more jobs this summer than last. Fighting for increase (\$11-\$14/hour) for next summer. Trying to get more private sector jobs for these youth.
  - d. Refugee Work- essentially no newcomers. Congregations continue to partner w/ families who need support.

Have turned our focus to Affordable Housing-working w/ CDC's, because there are concerns around gentrification that is happening downtown and in Kelly Square and the displacement that's happening as a result.

Community Preservation Act-opportunity to create pool of local money so we can attract state money. There will be a vote at next week's City Council meeting. We need 6 votes to get on ballot in November. Frank will send out email to everyone today. Only 3/11 councilors are on board. Need to call/email them

Also working with National Committee Reinvestment Coalition

5. Review priorities of strategic plan, create sub-committees for:
  - a. Creating a proposal for restructuring the board so that it's at least 51% low income people, and any other leadership structures needed to carry out our renewed mission.

Suggestion – we could put together a team to oversee CCHD to meet that criteria. Jim B is interested in working on this issue
  - b. Engaging diverse congregations and congregations of color.

Mary Chaina & Sarah Stewart are interested in working on this
  - c. Creating a proposal for membership and dues.

No one expressed interest, so we'll table it for now
6. 25<sup>th</sup> Anniversary event

We've decided to have a 25<sup>th</sup> Anniversary dinner to roast/celebrate Frank, introduce the new person, and celebrate 25 years of organizing. The event will be held on the same date we would have held the Beggar's Bowl -- Tuesday Oct 9<sup>th</sup>. Angela Pape from MCAN might be able to help out. Nathan & Sarah will spear-head this effort, but we'll need other people to help!

Nathan will check out Holy Cross Hogan Center as a possible venue; Sarah will check out Assumption College.

7. Next meeting: July 25<sup>th</sup> 12pm at First Baptist Church



## **Notes from the July 25, 2018 Board Meeting**

In attendance: Jose Encarnacion, Clarence Burley, Mary Chania, Jim Borque, Jane Cutting, Aviva Fellman, Aaron Payson, Clyde Talley, Nathan Piphon, Frank Kartheiser, Sarah Lange.

1. Welcome, prayer and introductions.
2. Current financial position –
  - (a) YTD financials – we continue to be in a solid financial position. For details, see attached financial report.
  - (b) We just received word that CCHD (Catholic Campaign for Human Development) has approved a \$40,000/year grant. This is a \$10,000/year increase! CCHD is our primary funder – they fund organizations for 6 years, then make you take a 3 year hiatus, which we are just now completing. We will need to reapply for funding each year, but we are confident we'll receive funding from them for the next 6 years.
3. Update on hiring process – July 15 was the deadline for accepting applications. We received 9 applications. We eliminated 5 immediately because the candidate did not have any community organizing experience. A 6<sup>th</sup> candidate submitted their application 2 days after the deadline, so they were also eliminated. We will be interviewing the remaining 3 candidates on August 9<sup>th</sup>. We will bring our hiring recommendation to the board for approval before offering the candidate the position.
4. Update on issue work –
  - (a) Clemente Course in the Humanities – we're working to transfer the fiscal sponsorship to the Worcester Art Museum; waiting to hear back from them. Antiquarian Society has also expressed interest.

(b) Youth Jobs – On August 2, our legislators will be touring Worcester work sites. There was a \$1M increase in YouthWorks funding. We hope to host a candidate's forum this fall to reinforce how important youth employment is.

(c) The Worcester Jobs Fund has been increased from \$100,000 to \$200,000 over the next 3 years. They're helping people connect with living wage jobs. We need to be proactive about this potential stadium, as there are huge implications for local employment. We also need to pay attention to how construction projects are impacting lower-income folks in the city.

(d) We recently created the Worcester Affordable Housing task force in response to the #1 issue facing newcomers in the city. We're partnering with other housing agencies to address the lack of affordable housing in Worcester. However, right now, "nonprofit" and "affordable housing" are considered dirty words in Worcester, so we anticipate some resistance.

5. 25<sup>th</sup> Anniversary event – mark your calendars! Our 25<sup>th</sup> Anniversary event will be held on October 10, from 5:30 – 7:30. Nathan, Jose E. and Sarah are working on organizing it, but we need your help! We're going to especially need volunteers on the night of the event. We'll let you know about ticket sales at our next board meeting. We're organizing an ad book – Sarah will create an information sheet and send it out to everyone.

6. Strategic planning subcommittees:

- a) Restructuring board group – Jim and Jose E are spear-heading this. If you'd like to join them, let one of them know!
- b) Diversity group – Sarah, Jane and Mary are working on this. They will be meeting at the end of August. If you'd like to help with this, please let one of them know.

7. Other business –

(a) Clarence told the group about an action that is happening on October 4 around closing local gas stations through civil disobedience. This is being organized by Scott Schaffer-Duffy. If you'd like more information, please contact Clarence or Scott.

(b) Mary shared an article about the meeting of the UCC conference in MA and the need for people who are progressive and religious to be more vocal. A copy of the article can be found here:

<https://www.bostonglobe.com/metro/2018/06/16/ucc-churches-look->

[organize-progressive-christian-voice/6sQOoV6YCUFPRsY35nB7TO/story.html](https://www.facebook.com/organize-progressive-christian-voice/6sQOoV6YCUFPRsY35nB7TO/story.html)

(c) Jane mentioned something about Hope for Housing, but I didn't catch everything she said. Sorry, Jane! If you want to share it again at our next meeting, that would be great!

**Next meeting will be held on August 29 @ 12:00 at First Baptist. As always, we'll feed you lunch! ☺**

Notes submitted by Sarah Lange



## **Notes from the Board Meeting**

**August 29, 2018**

Present: Sarah Stewart, Marty Kelly, Jim Borque, Aaron Payson, Kevin Downer, Robert Jackson, Clyde Talley, Mary Chanaille, Jane Cutting, Jose Perez, Richard Trainor, Aviva Fellman, Jose Encarnacion, Clarence Burley, Frank Kartheiser, Sarah Lange.

1. Welcome, Prayer, Introductions
2. Current financial position (YTD financials)
  - a. We reviewed the current financial report. There was a request to provide the information in a different format. Sarah will pass this request along to the book-keeper.
  - b. We discussed the need to terminate our fiscal sponsorship of the Clemente Course. We agreed to do this by the end of our fiscal year (12/31/18).
3. Hiring process
  - a. Hiring committee convened for ½ hour
  - b. Jose shared the Committee's recommendations with Board, which is to offer the job to Isabel Gonzalez-Webster. The board authorized the Hiring Committee to enter into negotiations with her.
  - c. We ask that everyone keep this information private until such time as we're complete with the negotiations.
4. 25<sup>th</sup> Anniversary event
  - a. Ad book: \$3,700 committed so far. Goal for ad book + sponsors is \$10,000.



- b. Ticket sales: so far, we've sold 33/375 tickets.
- 5. Issue work
  - Frank reported on this while the Hiring Committee convened
- 6. Strategic planning subcommittees:
  - a. Report out from:
    - i. Restructuring board group
      - Jim Borque reported on this
    - ii. Diversity group
      - Sarah Stewart reported on this

These reports were also provided during the time that the Hiring Committee convened.

- 7. Other business:
  - a. The High Holidays begin soon; Aviva will be largely unavailable during this time. Sukkot begins the evening of Sunday, September 23. Aviva invited everyone to attend services.
  - b. Aaron: tonight at 6pm, Freedom MA is holding a meeting for faith-based groups interested in working on the transgender bill that will be on the ballot. If you're interested in getting involved, please contact Aaron.
- 8. Next meeting
  - 9/27 at 12:00pm at Beth Israel, located at 15 Jamesbury Street (which is off Salisbury Street). She will serve us a kosher lunch in her Sukkah!



**Notes from the September 27, 2018 Board Meeting  
Held at Congregation Beth Israel, from 12:00 – 2:00pm**

Present: Aviva Fellman, Richard Trainor, Nathan Pipho, Ann Burgdorf, Mary Chanaille, Clarence Burely, Dave Woessner, Tim Lillenthal, Clye Talley, Frank Karthieser, Sarah Lange, Lisa McCarthy (guest).

1. Welcome & prayer:  
Aviva did a reading and a short presentation about Sukkot. Thanks for hosting us, and for providing lunch, Aviva!
2. Book-keeper:  
We met Lisa McCarthy, who is a book keeper here in Worcester. Lisa keeps the books for Mustard Seed and a number of other nonprofits in Worcester, including two of Sarah's clients. Betty (our current book keeper) will be retiring with Frank. Frank and Sarah are recommending Lisa as Betty's replacement. The group asked her several questions.

Worcester Interfaith is required to file annual State and Federal returns. Lisa works with CPAs to to prepare tax returns.

Lisa uses a sliding fee scale -- based on the organization's annual revenue -- which starts at \$40/hr.

People's United can do payroll (they hold our accounts). Lisa can also get a good deal with Paychex.

Lisa will oversee the work, she has 2 very experienced bookkeepers on staff. She uses QuickBooks online, gets it through Tech Soup.

After Lisa left, we took a vote:

Motion to hire Lisa was made by Aviva. This motion was seconded by Nathan. Everyone present voted yes. Frank and Sarah will help facilitate the transition from Betty to Lisa.

3. Financials:

The YTD financials were reviewed. Sarah noted that while the numbers don't look very good, to remember that we (a) have \$50,000 in the bank, (b) revenue from the 25<sup>th</sup> Anniversary event is streaming in, and (c) we get most of our grants in the 3<sup>rd</sup> quarter of the year.

4. Update on hiring and transition process:

The Hiring Committee is meeting on Oct 3rd meeting @ 2:30pm @ Trinity Lutheran.

Isabel starts Oct 15<sup>th</sup>.

Our goal is to still hire a second full-time person, but this will depend entirely on our ability to raise the funds necessary to create and sustain the position. Sarah reminded that we will still be able to work with Delia, who works for MCAN, but is in Worcester.

Leaders and clergy can help introduce Isabel to the community. Frank will help as well, but the main responsibility is on us. Perhaps each one of us can invite Isabel to speak at an upcoming service? Frank will identify relationships that need to be handed off with care.

5. Update on 25<sup>th</sup> Anniversary event:

Frank will make calls to past Beggar's Bowl attendees to encourage them to attend. So far, the ad book has brought in just under \$8,000. We've sold 115 tickets to date. Frank is sending out weekly email blasts to remind people to buy tickets in advance, since we need to get the caterer a headcount by 10/2.

6. Update on issue work:

Tim announced that there will be a MCAN leadership assembly-Oct 21<sup>st</sup>, 3-7pm, Framingham. Assembly of all MCAN leaders (including us) to do analysis of issue work we've done this year. Dinner will be served, Tim will send flyer with location.

Worcester Affordable Housing Coalition -- there is an anti-affordable housing sentiment in the city. The Community Preservation Act funds open space, affordable housing, preservation, and recreation. Communities need to sign on to get the money, which comes from a percentage of each real estate transaction. On Oct 16<sup>th</sup> there will be meeting at All Saints -- Frank will send out more information.

Community Benefits Agreement -- a CBA is being taken to city regarding the WooSox stadium and to the developer so the community does not get mown down in the process.

7. Update from strategic planning subcommittees:

Sarah Stewart and Jim Borque were not in attendance to report out on the Restructuring the board group or the Diversity group.

8. Other business:

Discussion about Ballot initiative No. 1 – it seems confusing. Where do we, as an organization, stand? The bill seems poorly written and the timeline (1 year) seems unrealistic. We helped collect signatures to get this on the ballot. What does that mean? Some people said they feel conflicted, because they're not sure they're going to vote yes. We affirmed that we, as an organization, do not have to take a position on this. Aviva suggested asking Sandy Ellis from MA Nurses Assoc. for more info.

In the future, let's talk about this stuff up front -- collecting signatures because the issue matters vs. endorsing it.

Do we want to host a forum? League of voters hosted one last night at 1<sup>st</sup> Baptist. Aviva is hosting a lunch 'n learn for her Congregation about Question #3. Frank will send out email to see if there is interest in hosting a forum.

9. Next meeting: October 25<sup>th</sup>, 12:00pm at 1<sup>st</sup> Baptist. Lunch will be served.



**Notes from the Board Meeting held October 25. 2018**  
**12:15-1:30pm**

**Present: Jose Perez, Mary Chanaille, Clarence Burley, Robert Jackson, Jane Cutting, Aviva Fellman, Jim Bourque, Richard Trainor, Nathan Piphio, Frank Kartheiser, Sarah Lange.**

1. Welcome & Prayer
2. Financials:
  - a. Sarah handed out the September financial statement.
  - b. Isabel and Sarah will work with Betty to develop the 2019 budget. We will present it to the board by the end of the year for review and adoption.
3. Update -- Leadership transition: Frank's last day is 10/31. Isabel is settling in nicely. Frank will be on call for any issues that arise.
4. Update -- Bookkeeping transition: Betty is staying on through the end of our fiscal year (12/31/18), then book-keeping will transition to Lisa McCarthy.
5. Update: 25<sup>th</sup> Anniversary event
  - a. We sold \$8,300 worth of ticket via Eventbrite and \$3,100 via other means.
  - b. We made \$10,400 from the ad book (this includes those who have not yet paid).
  - c. We grossed \$21,800 from the event.
6. Update -- Issue Work
  - a. Youth Jobs: Our legislators have generally been very supportive of the Youth Works funding. Only 1 candidate (David LeBoeuf) showed up to our Candidate's Forum, which was attended by 100 people. We asked for \$11-14 million so we can hire the same number of youth. We need more money because minimum wage is going up \$0.75/year until it reaches \$15.00. About 2,000 youth are eligible for these jobs, but we can only provide about 300 with employment. The city provides at least 75 more jobs in the parks, but there are still a lot of youth who could benefit from this program.
  - b. Living Wage Jobs: there are 5 job training programs being launched -- Building Trades, CDL (commercial drivers license), Culinary Arts, Customer Service Representative and Pharmacy Tech. These are all living-wage jobs.

- c. Affordable Housing: Rents are increasing, gentrification is forcing people out. Most of the housing projects that are being built are market rate. There is some talk about considering a tax on apartment buildings, but this would have to be approved by the city council and the state. Pernet (one of our members) needs help with door-knocking in the Green Island neighborhood.
  - d. Other issues: After school programs and activities for middle school students is an issue that's bubbling up at Nathan's congregation.
7. Update from strategic planning subcommittees:
- a. Restructuring board group – there was no report
  - b. Diversity group -- have not made any substantial progress
8. Other/New Business:
- a. Worcester Friends Meeting wants to bring Debbie Irving to Worcester in 2019. They need a venue and support for outreach and sponsorship. Cost is \$2,500. Jane has seen her speak, says she's amazing. Trinity Lutheran is willing to host.
  - b. Thanksgiving Service: For the past 2 years, we've organized an interfaith Thanksgiving service. It was a celebration of Thanks, not really a religious service, per se. We also took a collection for the Worcester County Food Bank. We're going to skip it this year, because of the leadership transition. Instead, Aviva suggests we participate in the Souper Bowl, which is when people (congregations) get together to make a meal and deliver it to a shelter. It's supposed to involve youth.

We can encourage all local congregations to make a meal on site, but offer to host at 1<sup>st</sup> Baptist those who do not have a kitchen, or have them work with another congregation. The board voted to participate, but need to iron out the details (Motion: Aviva; 2<sup>nd</sup>: Mary. Vote=unanimous yes). <https://souperbowl.org/welcome>

The question that arose as part of this conversation was: What are ways we want to be in worship? In service? For example, Aviva suggested we work on a Habitat for Humanity project together. We'll continue to explore this as we deepen our work together.

**NEXT MEETING: November 29<sup>th</sup> at 12:00, First Baptist**

Organization Name: Worcester Interfaith		Fiscal Year (MM/YY to MM/YY): 01/18 - 12/18		
Current as of (MM/DD/YY): 10/31/18 (PLEASE NOTE: WE DO NOT YET HAVE OUR NOV BANK STATEMENTS; WE REALIZE MUCH OF OUR INCOME IN THE 3rd QUARTER)				
	Column #1	Column #2	Column #3	Column #4
CCHD Grant Year	Actual Organizational Income & Expenses	Approved 12-month CCHD Budget	CCHD Expended Amount	CCHD Unexpended Amount & Proposed Use
INCOME	Actual Organizational Income for July-October	CCHD Grant Amount for 12 months	CCHD Grant Amount July-December	Unexpended Amount of CCHD funds (Unexpended from first half plus second half)
Member Dues	\$ 5,823.00	\$ 10,000.00		
Grassroots Fundraising	\$ 20,350.00	\$ 20,000.00		
Individual Donors	\$ 261.00	\$ 250.00		
Foundation Grants (List Foundations)	\$ 47,000.00	\$ 87,000.00		
Country Bank - \$500; Fletcher - \$5,000; Daniels - \$7,500; Zakim \$10,000; Hoche-Scofield - \$2,000; Price Chopper - \$500; People's United - \$5,000; Stoddard - \$5,000; Unibank - \$500; Webster 5 - \$1,000				
CCHD Local Grants	\$ -	\$ -		
<b>CCHD National Grants</b>	\$ 40,000.00	\$ 40,000.00	\$ 20,000.00	
Corporate Donations	\$ -	\$ -		
Government Support	\$ -	\$ -		
Other Income (Please List)	\$ 6.70	\$ 8.00		
<b>TOTAL INCOME</b>	\$ 113,440.70	\$ 157,258.00	\$ 20,000.00	
EXPENSES	Actual Expenses July- October	Approved Use of CCHD Funds for 12 months	Actual Expenditure of CCHD Funds July-December	Proposed Use of Unexpended Amount of CCHD Funds
<b>A. Personnel &amp; Salaries (List names and titles) - *REQUIRED</b>				
Frank Kartheiser (Jan 1 - Oct 31)	\$ 47,802.00	\$ 82,674.00	\$ 15,000.00	
Isabel Gonzalez-Webster (Oct 15 - Oct 31)	\$ -			
<b>Total Salaries/Wages</b>	\$ 47,802.00	\$ 82,674.00	\$ 15,000.00	\$ -
<b>B. Fringe Benefits, Taxes, Pension (List)</b>				
Medical reimbursement	\$ 860.00	\$ 8,000.00	\$ 1,500.00	
Pension contribution	\$ 1,054.00	\$ 3,000.00		
MA Employment tax (we pay this in December)	\$ -	\$ 1,000.00		
Payroll tax	\$ 3,825.00	\$ 8,000.00		
<b>Total Benefits</b>	\$ 5,739.00	\$ 20,000.00	\$ 1,500.00	\$ -
<b>C. Office Expenses (List: i.e. telephone, supplies, printing, etc)</b>				
Telephone & internet	\$ 872.00	\$ 1,500.00	\$ 500.00	
Supplies	\$ 373.00	\$ 400.00	\$ 200.00	
Filing fees	\$ 101.00	\$ 100.00	\$ 50.00	
Workman's comp. insurance	\$ -	\$ 300.00		
<b>Total Office</b>	\$ 1,346.00	\$ 2,300.00	\$ 750.00	\$ -
<b>D. Occupancy Expenses (List: i.e. utilities, rent maintenance, etc.)</b>				
Rent	\$ -	\$ 2,000.00		
Maintenance	\$ 341.00	\$ 100.00		
<b>Total Occupancy</b>	\$ 341.00	\$ 2,100.00	\$ -	\$ -
<b>E. Travel Expenses (List: ie. Staff travel, member travel)</b>				
Travel allowance	\$ 653.00	\$ 1,500.00	\$ 500.00	
<b>Total travel</b>	\$ 653.00	\$ 1,500.00	\$ 500.00	\$ -

Current as of (MM/DD/YY): 10/31/18 (PLEASE NOTE: WE DO NOT YET HAVE OUR NOV BANK STATEMENTS; WE REALIZE MUCH OF OUR INCOME IN THE 3rd QUARTER)				
	Column #1	Column #2	Column #3	Column #4
CCHD Grant Year	Actual Organizational Income & Expenses	Approved 12-month CCHD Budget	CCHD Expended Amount	CCHD Unexpended Amount & Proposed Use
<b>F. Program Expenses</b> (List: ie. stipends, training expenses, etc.)				
Copy/print	\$ -	\$ 200.00		
Postage	\$ 100.00	\$ 150.00	\$ 50.00	
Conference/training	\$ 1,089.00	\$ 500.00		
Subscriptions	\$ 241.00	\$ 300.00	\$ 200.00	
Supervision/membership	\$ -	\$ 5,000.00	\$ 1,000.00	
Local meetings	\$ 2,657.00	\$ 2,500.00	\$ 1,000.00	
Total training \$	\$ 4,087.00	\$ 8,650.00	\$ 2,250.00	\$ -
<b>G. Outside Services</b> (List: i.e. consultants, technical assistance providers)				
Book-keeping	\$ 2,590.00	\$ 2,000.00		
Development consultant	\$ 6,816.00	\$ 15,000.00		
Total outside \$	\$ 9,406.00	\$ 17,000.00	\$ -	\$ -
<b>H. Other</b> (List other expenses)				
Depreciation	\$ 137.00	\$ 200.00		
Fundraising event costs		\$ 1,500.00		
Strategic & Succession planning consultant	29300	0		
TOTAL EXPENSES \$	\$ 69,374.00	\$ 134,224.00	\$ 20,000.00	\$ -
SURPLUS/DEFICIT \$	\$ 44,066.70	\$ 23,034.00	\$ -	\$ -



Worcester Interfaith, Inc.  
Balance Sheet  
October 31, 2018

ASSETS

Current Assets		
PUB Checking - Operating	\$ 64,220.08	
PUB Checking - CHD	2,161.70	
	<hr/>	
Total Current Assets		66,381.78
Property and Equipment		
Equipment	2,324.21	
Accum Depreciation - Equipmnt	(1,804.75)	
Organizational Expense	500.00	
Accum Amortization - Org Exp	(500.00)	
	<hr/>	
Total Property and Equipment		519.46
Other Assets		
	<hr/>	
Total Other Assets		0.00
		<hr/>
Total Assets	\$	<u>66,901.24</u>

LIABILITIES AND CAPITAL

Current Liabilities		
Pension W/H	\$ 111.00	
	<hr/>	
Total Current Liabilities		111.00
Long-Term Liabilities		
	<hr/>	
Total Long-Term Liabilities		0.00
		<hr/>
Total Liabilities		111.00
Capital		
Fund Balance	80,440.82	
Net Income	(13,650.58)	
	<hr/>	
Total Capital		66,790.24
		<hr/>
Total Liabilities & Capital	\$	<u>66,901.24</u>



## **BOARD OF DIRECTORS**

As of June 1, 2018

Rev. Jose Encarnacion, Iglesia Cristiana de la Comunidad, President  
Mr. Gary McConnell, First Presbyterian Church, Treasurer  
Mr. James Bonds, Emmanuel Baptist Church, Secretary

Mr. James Bourque, All Saints Episcopal Church  
Rev. Clyde Talley, Belmont AME Zion Church  
Rev. Richard Trainor, Blessed Sacrament Roman Catholic Church  
Mr. Martin Kelly, Chaplain's Office, College of the Holy Cross  
Rev. Ann Burgdorf, Concordia Lutheran Church  
Rabbi Aviva Fellman, Congregation Beth Israel  
Rev. Brent Newberry, First Baptist Church  
Rev. Sarah Stewart, First Unitarian Church  
Rev. Kevin Downer, Greendale People's Church  
Rev. Roberto Ochoa, Lakeview Congregational Church  
Rev. Oscar Amparo, Ministirios La Trinidad  
Rev. Esau Vance, Mt. Olive Pentecostal Church  
Rev. David Gentleman, New Cana Church  
Ms. Sheilah Dooley, Pernet Family Health Service  
Rev. Mark Nilson, Salem Covenant Church  
Rev. Jose Perez, Rock of Salvation Church  
Rabbi Valerie Cohen, Temple Sinai  
Rev. Nathan Pipho, Trinity Lutheran Church  
Rev. Aaron Payson, Unitarian Universalist Church  
Rev. Nancy Elder-Wilfred, United Congregational Church  
Rev. Shandirai Mawokomatanda, Wesley United Methodist Church  
Ms Jane Cutting, Worcester Friends Meeting  
Imam Asif Hirani, Worcester Islamic Center

26 members, one per member institution

November 29, 2018  
Worcester Interfaith Board Meeting Notes:

In attendance: Rev. Encarnacion, Jim Bourque, Rev. Poppe, Rev. Tally, Fr. Trainor, Martin Kelly, Rabbi Fellman, Rev. Stewart, Rev. Downer, Rev. Nilson, Rev. Payson, Jane Cutting, Mary Chenille, Imam Asif Hirani, Robert Jackson

Excused: Rev. Pipho, Rev. Newberry, James Bond, Rev. Perez, Rev. Amparo, Rev. Elder-Wilfred, Rev. Mawokomatanda, Rev. Vance

Members agreed to continue having board meetings once a month. Every other meeting will be a space for leadership development and relationship building. It was also voted that each meeting be held in a different congregation.

Consensus was that the meetings take place 4th Wed of the month from 12-1:30. Being mindful to the upcoming holidays and the different faiths in the room. Each faith leader will let us know if a board meeting conflicts with a religious holiday.

There are Five committees that have been identified: The lead of each committee will coordinate a meeting date.

**Committees are as follows:**

**Recruitment of people of Color:**

Lead: Rev. Sarah Stewart  
Mary Chenaille  
Rev Jose Encarnacion  
Jane Cutting  
Rev. Clyde Tally will check with Rob Thomas

**Dues Restructuring:**

Lead: Jim Bourque  
Rev Jose Encarnacion

**Social Committee:**

Lead: Rabbi Aviva Fellman  
Rev. Kevin Downer  
Marty Kelly

**Finance / Fundraising Committee:**

Lead: Rev. Aaron Payson

Jim Bourque

Rev. Mark Nilson

Rev. Sarah Stewart

**Strategic Planning Committee:**

Lead: Rev Jose Encarnacion

Rev. Nathan Piphio

Rabbi Aviva Fellman

Rev. Aaron Payson

Rev. Jose Perez

Isabel will follow up with folks that did not attend to extend an invite to the committees.

1. There will be no meeting in Dec. Due to the Holidays.
2. The January meeting will be held at the Worcester Islamic Center.
3. We will send out an edn of the year solicitation letter to supporters.
4. We have decided to support and join the statewide 10 year agenda.  
<https://massclu.org/category/10-year-agenda/>
5. Rev. Aaron Payson will speak at the upcoming 1199 event, Isabel will attend as well.
6. There was a fire at colleague Rev. T. J Demarco's congregation. Rev. Aaron Payson will coordinate a visit of fellow colleagues to visit him. Thankfully the Diocese is supporting the congregation.

**BOARD APPROVAL FORM**

By signing this document, I confirm that I, as chair of the board, have read the submitted CCHD application. I also confirm that it was discussed at a board meeting on \_\_\_\_\_(date). The board approved this application submittal to CCHD on \_\_\_\_\_(date).

\_\_\_\_\_

Board Chairperson

# Community Development Interim Report and Refund Application

## Foreword

In applying for a grant from the Catholic Campaign for Human Development (CCHD), it is helpful to know and understand the mission and principles which guide CCHD and its funding decisions. In this brief "Foreword", CCHD's foundations and values are summarized.

**Foundations of CCHD:** CCHD was established in 1969 by the U. S. Catholic Bishops as a witness to the Gospel of Jesus Christ, an expression of the Social Doctrine of the Catholic Church, and a response to the church's call to interpret "the signs of the times." CCHD was founded to help poor people help themselves escape poverty and address its causes by investing in their development so they can participate in the decisions that affect their families and communities.

**CCHD's Gospel Mission:** CCHD continues the mission of Jesus and His Church "to bring good news to the poor, liberty to captives, new sight to the blind and set the downtrodden free..." (Luke 4:18)

**Catholic Identity:** CCHD is a work of the Catholic Church in the United States. CCHD draws its directions, policies and practices from Catholic social and moral teaching and prohibits funding groups that violate fundamental Catholic teaching. In all its work, CCHD seeks to carry out the following central themes of Catholic social teaching:

**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 & 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.

**Pursuing Justice:** CCHD supports self-help efforts to bring about positive institutional changes that address root causes of poverty, carrying out Pope Benedict XVI's teaching that "justice is inseparable from charity, and intrinsic to it. Justice is the primary way of charity" and his call to pursue the common good through "the institutional path of charity." (Caritas in Veritate, 6-7). And, as Pope Francis reminds us, "Charity that leaves the poor person as he is, is not sufficient. True mercy, the mercy God gives to us and teaches us, demands justice." (From an address on Sept. 10, 2013).

**Faithful Stewardship:** CCHD seeks to make effective and faithful use of resources-financial, institutional and human-to advance CCHD's mission in accountable and transparent ways.

## Instructions

### Type of Funding Requested

To ensure that your application is properly coded in our database, please select "Community Development."

Community Development

Be sure to read the revised [Guide for CCHD Grant Applicants](#) before beginning this application. The Guide for CCHD Grant Applicants outlines: CCHD's principles and goals, eligibility criteria, and definitions for various terms used in the Application. The Guide also offers tools for applicants to evaluate their eligibility and their readiness to apply for CCHD grant support.

Fill out all fields as completely as possible, answering ALL questions in a particular field. You must answer all questions by providing information with respect to your organization only; do not answer questions relying on activities, members, finances, etc. of related or affiliated organizations.

Pay close attention to formatting instructions, word limits, required fields, and the new 'help texts' (found by clicking on the 'i' icon). You will not be allowed to submit your application if any of the required fields are not filled out correctly.

Do not forget to complete and upload all required attachments. Failure to submit all required attachments are grounds for grant request declination.

### Request Date

December 15, 2018

## A. Contact Information

### General Organizational Contact Information

Name of Organization

Use complete name.

Worcester Interfaith

A.K.A. Name of Organization

Worcester Interfaith

Street Address of Organization

111 Park Avenue

City

Worcester

State

MA

Zip Code

01609

Main Phone Number of Organization

Enter the 10 digit number with no formatting. For example, 1234567890.

5087545001

Web Site Address of Organization

If none, please enter N/A.

<http://www.worcesterinterfaith.net>

**Head of Organization (Executive Director, Lead Organizer, CEO, President, Chair, etc.)**

Prefix

Ms.

First Name

Isabel

Last Name

Gonzalez-Webster

Title

Lead Organizer and Director

Mailing Address

111 Park Avenue

City

Worcester

State

MA

Zip Code



01609

Mobile Phone

Office Phone

5087545001

Extension

E-mail

worcester.interfaith@gmail.com

**Primary Contact for this Request (Development Director, Grants Writer, or may be the same as the Head of the Organization)**

If the Primary Contact (below) is the same person listed above, please check here.

Yes

Prefix

Ms.

First Name

Isabel

Last Name

Gonzalez-Webster

Suffix

Title

Lead Organizer and Director

Mailing Address

111 Park Avenue

City

Worcester

State

MA

Zip Code

01609

Office Phone

5087545001

Mobile Phone

E-mail Address

worcester.interfaith@gmail.com

Extension

**Board Chair**

Prefix

Reverend

First Name

Jose

Last Name

Encarnacion

Phone

7742422691

Extension

E-mail

revjose@icccworccchurch.org

## B. Tax Information

Date of Incorporation or Creation of Organization

January 01, 1993

Employer Identification Number of Organization

Please omit formatting and enter numbers only. For example, 90-0009000 would be 900009000.

043158699

Organizational Status (corporation, trust, unincorporated association, etc.)

501c3 nonprofit

If your organization is exempt from Federal income tax under section 501c3 of the Internal Revenue Code, please check the box below.

Yes

Date of IRS 501c3 Determination Letter

January 01, 1993

If your organization is not yet a 501c3 tax-exempt organization, please indicate the date on which its Form 1023 was filed with the IRS.

Is your organization required to file Form 990?

Yes

Indicate the date on which the most recent Form 990 was filed.

March 15, 2018

501c4 Information

Is your organization affiliated with an organization that is exempt from Federal income tax under section 501c4 of the Internal Revenue Code? If yes, please indicate the name, address and EIN of the affiliated 501c4 organization and describe the relationship between your organization and the affiliated 501c4 organization.

## C. Request Summary

Total Annual Budget for Organization for Proposed Grant Year

Omit formatting and enter numbers only. For example, 100000 for \$100,000.

145057

#### Amount Requested

CCHD grant awards range from \$25,000 to \$75,000. Omit formatting and enter the numbers only. For example, 25000 for \$25,000.

50000

#### Use of Funds

Summarize the proposed use of CCHD funds. (Limit 150 words.)

Funding from CCHD will support the work of our Lead Organizer, some of the expenses related to the work we do, and some of the expense related to our book-keeping and development operations. In the coming year, we will continue to focus on issue work – jobs for youth and adults, affordable housing, and the disproportionate number of students of color who are disciplined in the Worcester Public Schools. Organizationally, we will continue to help Isabel transition, revisit our dues and membership structures, strengthen and expand our membership and board, and engage a greater number of diverse congregations and congregations of color in our work. We are also going to bring the Ten Year Agenda to Worcester.

## D. Organizational History with CCHD

### Diocese(s)

Select the Diocese(s) in which your organization will be active in the coming grant year. **The first diocese selected will be considered the Primary Diocese for this application** and all others will be considered Secondary Dioceses. You may select up to five.

AREA A-Massachusetts-Worcester

### CCHD Funding History

#### Previous CCHD National Funding

List the years and grant amounts for CCHD national funding awarded to your organization in the past.

2010 - \$25,000

2011 - \$25,000

2012 - \$30,000

2013 - \$30,000

2014 - \$30,000

2014 - \$30,000

#### Local Diocesan CCHD Funding

Indicate if your organization has received a local diocesan CCHD grant in the past. List years and amounts. If none, please enter N/A.

N/A

## E. Organizational Profile

### Description of Organization

#### Organizational Description

Briefly summarize the history, mission and issue focus of your organization. (Limit 200 words).

Worcester Interfaith works to ensure that public resources benefit those who need it most – specifically, those of low- income or newcomer status and people of color who have been left behind by the economy. We use an institutional organizing model and strive to empower all of those engaged in our work. We conduct one-to-one meetings, “house” meetings, and delegates’ assemblies to identify the issues on which people want to work. People participate via Issue Committees, Campaigns, meetings, leadership trainings and other activities. They find and use their voice, learn leadership skills, adopt leadership roles, and learn how to play an instrumental role in leveraging positive social change.

#### PovertyUSA Organization Description

Founded in 1993, Worcester Interfaith organizes to achieve positive change that benefits those who are marginalized or oppressed. At present, our focus is on economic development for adults youth, inequities in education, and affordable housing.

#### Organizational Accomplishments

List one or two of the most significant accomplishments (internal or external) your organization has achieved within the last year. What were the key factors to your achieving those accomplishments? (If none, please leave blank.) (Limit 250 words)

We successfully completed a comprehensive, participatory strategic and succession planning process, which resulted in a new vision, new goals, and the hire of a bi-lingual, bi-cultural leader. Through this process, we were able to help clergy develop more leadership skills, increase their ownership of the organization, and attract three new institutional members. One of the key factors in our success was that we were able to hire a consultant with a background in organizational development to work side by side with a core group of 8 clergy to oversee the strategic planning and succession planning process. This group also served as the Hiring and Transition Committee and will no doubt continue to play key leadership roles as the work of the organization takes a new direction.

#### Organizational Challenge

Describe the most significant challenge the organization is currently facing (internal or external) and what you are doing to address it. Has the situation improved or gotten worse since your previous grant application? (Limit 250 words)

The biggest challenge facing our organization in the coming years will be leveraging sufficient funding. In 2016, we were fortunate enough to receive a one-time gift of \$50,000 from a benefactor. Since we knew Frank was retiring and that hiring a new leader would cost us significantly more than we were paying him, we tucked the money away. These funds allowed

us to hire a top-notch organizer and will see us through the first year, but we will need to engage in more fundraising if we're going to continue making ends meet. As we head into the next fiscal year (our FY begins on January 1st), we are in the process of identifying potential new funders and other ways we might generate revenue.

### Population Served/Members

If your organization works with a particular population, please select from among the following. If not, you may leave this field blank.

### Geographic Focus

Select the area that best describes the geographic focus of your work.

Urban

### Issue Area

Select up to three issue areas that your organization is working on in order of priority.

ECONOMIC DEVELOPMENT

YOUTH ORGANIZING

HOUSING

## Organizational Membership

### Type of Organizational Membership

Select the type that best describes your organization's membership structure.

Institutional Membership

### Definition of Organizational Membership

Describe how the organization defines membership. (250 words)

Worcester Interfaith is comprised of 26 institutional members – 20 congregations and 6 community-based organizations. In the coming year, we will be revisiting and possibly revamping our membership and dues structure to ensure that they are not an impediment to participation. We will also be evaluating – and most likely changing – our board structure, so that more lay people are involved. Over the long haul, we want to expand our membership base.

### Geographic Description of Membership

Identify the specific neighborhoods, parts of the city, towns, counties, or areas within a state or region in which your organization or coalition currently has members. (Limit 250 words.)

Our members come from across the city and represent the religious, economic, geographic and racial diversity of Worcester.

If your organization primarily recruits individual members, how many individual members does your organization have?

Please input integers for example, for one hundred, input 100. If you do not have individual members, please enter, "0."

0

If your organization primarily recruits institutional members, how many institutional members does your organization have?

Please input integers for example, for one hundred, input 100. If you do not have institutional members, please enter "0."

26

#### Race/Ethnicity of Membership

Indicate the primary and secondary race/ethnicity of your membership or participants. Only use multi-ethnic if your organization works with significant populations of three or more races/ethnicities.

White

Hispanic

#### Changes in Membership Base

Please describe any significant changes in your membership in the past 12 months. Please consider changes to the definition or structure of membership, the geographic representation of members (i.e., specific neighborhoods, parts of the city, etc.), and the racial/ethnic makeup of members. If there have been no changes, please enter N/A. (Limit 200 words.)

Over the past year, we've gained 3 new members.

## F. Catholic Mission & Foundation

### CCHD's Mission

CCHD is the anti-poverty program of the USCCB and takes its mission from the one given by Jesus of Nazareth (the Christ) in Luke 4:18: "to bring good news to the poor, liberty to captives, new sight to the blind, and to set the downtrodden free." CCHD is guided by USCCB priorities and the principles of Catholic social and moral teaching: respect for human life and dignity, the priority for the poor and vulnerable, participation, rights and responsibilities, subsidiarity and solidarity, strengthening families and building community, seeking the common good, the dignity of work & rights of workers and care for God's creation.

In what specific ways will CCHD funding for this proposal advance CCHD's mission and reflect the principles of Catholic social teaching? (Limit 300 words.)

The goal of Worcester Interfaith is to ensure that public resources benefit the "least among us" first. All of our campaigns – increasing the minimum wage, securing YouthWorks funding, the Jobs Trust Fund, the Fight for 15, family and medical leave – are aimed at increasing the quality of life for those who are being left behind by the economy; specifically, those of low-income, minority and newcomer status. When we win these victories, it helps improve the quality of life and provides social and economic justice for the poor, who are often "captives" of the economy. Each victory brings more "good news to the poor." When we educate power brokers -- city officials, business leaders, legislators, etc. – and when those who are most affected by these issues provide testimony, we provide "new sight to the blind." Educating elected officials also helps shape government in a way that better provides for the common good. The work of Worcester Interfaith is based entirely on relationships. Through one-to-ones, house meetings, delegates assemblies, training, and other vehicles, we provide people with the opportunity to identify and use their God-given gifts and talents, with the tools for participation in civic and economic life,

and to develop to their potential as leaders. Bringing people together to work on a common cause creates solidarity, strengthens families and builds community. The foundation for dignity is having one's basic human needs met. Our campaigns improve the quality of life for the poor, the vulnerable and the marginalized. By addressing social, economic and racial injustice and building bridges between and among faith communities and other institutions, Worcester Interfaith promotes the dignity of human life. Our goal is to put our faith values to work to create positive change in Worcester – and the world.

## **Prohibitions**

As an initiative of the Catholic Church in the United States, CCHD **cannot fund** organizations that engage in activities that contradict fundamental Catholic moral or social teaching. (e.g. promotion or support of contraception, abortion, same-sex marriage, euthanasia, racism, the use of the death penalty or punitive measures toward immigrants, etc.) Prohibited activities include participation in or endorsing actions that promote legislation, ballot initiatives (including voter guides and other written materials) that contradict fundamental Catholic moral or social teaching.

CCHD cannot fund groups that knowingly participate in coalitions that have as part of their organizational purpose or coalition agenda or actions that contradict fundamental Catholic moral or social teaching.

Refer to the Guide for CCHD Grant Applicants for more information about the [moral and social teachings of the Catholic Church](#).

Will organizational activities of the applicant organization in any way endorse or promote principles that are contrary to Catholic teaching?

No

CCHD cannot fund groups that engage in prohibited political campaign intervention on behalf of or opposition to any candidate for political office within the meaning of section 501(c)(3) of the Code. Grantee can engage in genuinely non-partisan voter registration, education and advocacy but agrees not to participate in politically partisan activities which are prohibited.

Will the organization participate or intervene in political campaigns on behalf of or in opposition to any candidate for public office?

No

## **G. Catholic Participation**

### **Catholic Participation**

CCHD encourages the active participation and involvement of Catholic parishes, diocese, institutions, clergy and other individuals in the mission of CCHD and the work of CCHD funded groups. CCHD seeks to identify Catholic clergy, parishes

and other Catholic institutions and organizations with membership in or acting in support of CCHD funded organizations. Please note that involving Catholics in your organization's efforts is NOT a requirement for funding but CCHD considers relationships with Catholic parishes and institutions an asset in advancing the CCHD mission and a plus in receiving CCHD funding.

In what ways (if any) are Catholic parishes, diocese, institutions, clergy, religious and other individuals involved in or supportive of the activities in this application and your organization? (Limit 150 words.)

Over the past 18 months, Father Richard Trainor of Blessed Sacrament RC Church has played a key role in the strategic and succession planning process. He has been in attendance at most meetings, and has made many thoughtful observations and suggestions throughout the process. He is well-respected and well-liked by his peers and is looked to as a key leader in our organization.

List the names of Catholic parishes or other Catholic organizations that are members of your organization. If you have added or lost any Catholic institutional members, please describe. If none, please enter N/A.

Blessed Sacrament RC Church  
Pernet Family Health

List the names of Catholic parishes or other Catholic organizations that act as partners (but are not members) with your organization's efforts. If none, please enter N/A.

N/A

List the names of key Catholic clergy (priests, deacons) and members of religious communities who are involved with your organization's efforts. Include their parish affiliation. If none, please enter N/A.

Fr. Richard Trainor, Blessed Sacrament, Worcester

## H. Priority for the Poor

One of the goals of the Catholic Campaign for Human Development is the empowerment of low-income people. The belief that those who are directly affected by unjust systems and structures have the best insight into how to change them is central to CCHD. Therefore, people living in poverty should have the dominant voice in applicant organizations. For more information refer to the ["What does CCHD mean by Low-Income Control?"](#) section of the Guide for CCHD Grant Applicants.



## Poverty Indicator

In an effort to more accurately measure the level of low-income leadership in applicant organizations, CCHD asks that all applicants use either the Very Low-Income or Low-Income household definition of the [U.S. Department of Housing and Urban Development](#). (Once on the site, you must select 'Click Here for FY 2017 IL Documentation' to view data by county.) This indicator should be used by applicants to: 1) determine the number of low-income participants on the board; and, 2) determine the number of low-income participants among the general membership. If you have questions about how to use this indicator, please contact your [Grants Specialist](#).

What is your area median income figure?

\$46,105

Please indicate which standard - 50% of AMI or 80% of AMI - you have selected.

80%

Please report the income figures for 1, 2, 3 & 4 person households for the standard you have selected.

1: \$47,600

2: \$54,400

3: \$61,200

4: \$68,000

## Organizational Governing Board

Enter total number of members of governing board.

26

Enter number of members of governing board living in poverty (per the AMI standard you have selected)

4

Enter the percentage of governing board members living in poverty; use whole numbers only, omitting percentage (%) sign. For example, 50% should be entered as 50.

15

Do your organizational bylaws require any particular proportion of low-income participation on the governing board? If so, please quote the section of your bylaws here.

Our by-laws themselves do not set such a requirement. However, as part of our efforts to restructure our board, membership and dues, we will most likely be changing our by-laws.

#### Primary Race/Ethnicity of Organizational Board Members

White

#### Secondary Race/Ethnicity of Organizational Board Members

Hispanic

#### Plan for Low-Income Board Participation

If your organization board is NOT made up of at least 50% low-income people, please answer questions (a) and (b) below. If your organizational board is made up of 50% low-income people, please enter N/A for both (a) and (b).

(a) Please explain why low-income people are not a significant component of your governing board. (Limit 150 words.)

In the past 2 years, many of our board members have moved or retired. Because we were heading into a strategic and succession planning process, we felt the best thing to do was ensure that our clergy were highly involved so we could build their leadership skills and increase their ownership of the organization. This way, the new leader would have a strong board with which to work. The current board has signed on for a one-year term -- from June 1, 2018 - May 30, 2019 -- with the idea that once a new leader was hired, we would focus on restructuring the board to include more lay people. Now that Isabel is here, we can focus on evaluating the board and membership/dues structures. We have established 2 board committees to focus in these areas and expect significant changes to occur in 2019.

(b) Provide a plan to identify, engage, and develop low-income people to serve on your board, including a timeframe with specific action steps and benchmarks for accomplishing this goal. (Limit 250 words.)

Two of the priorities that emerged from our strategic planning process were: (1) restructure the board to include more lay people, and (2) evaluate our membership and dues structure. There are a number of vehicles which will allow us to identify emerging lay leaders: (a) We have started working to address disciplinary disparities and issues relating to accessing vocational education, which is putting us in touch with many parents in Worcester. (b) We have started working on affordable housing, which is putting us in contact with numerous residents, nonprofits, and community groups who are concerned about this issue. This will allow us to identify lay leaders. (c) Beginning in March, we will be working to bring the Ten Year Agenda to Worcester. Through this and the other issue work we're doing, we are confident that we can identify low-income people who want to play a key role in the work of Worcester Interfaith.

#### Membership

##### Individual Membership

For organizations that primarily recruit individual members, indicate the percentage of members who are living in poverty. Enter whole numbers only, omitting percentage (%) sign. If your organization does not have individual members, please leave blank.

## Institutional Membership

For organizations that primarily recruit institutional members, indicate the percentage of member institutions that primarily consist of low-income people. Enter whole numbers only, omitting percentage (%) sign. If your organization does not have institutional members, please leave blank.

43

## Additional Organizational Structures

In addition to board composition, CCHD will consider other organizational structures and systems which ensure that poor people have a dominant voice in the direction of the organization, how the organization's activities and priorities will impact poor people and how poor people are identified, engaged and developed to take leadership positions within the organization. Please answer the following questions to describe the role of people living in poverty in the decision making of the organization.

### How is the board elected? (Limit 100 words.)

Each institutional member elects someone to represent them on the board. Most of our current board members are clergy. All present board members have signed on for a one-year term that's due to end May 30, 2019. Between now and then, we will be conducting significant outreach with diverse congregations and congregations of color (particularly "storefront" churches) and engaging people in the work we're doing around affordable housing, racism in the Worcester Public Schools' disciplinary practices, and the Ten Year Agenda. Our goal is to have the board be predominantly lay people, with clergy participating in quarterly Clergy Caucus meetings.

### How often does the board meet? (Limit 100 words.)

every month

### How is the board accountable to membership? (Limit 100 words.)

The representatives on the board are required to report back to their institutions on the work of Worcester Interfaith.

### Describe additional structures (i.e. issue committees, task forces, membership recruitment, etc.) in which members participate in decision-making. Specify how low-income members participate in decision-making within the organization. (Limit 150 words)

People who want to get involved with Worcester Interfaith can do so through issue committees, campaigns, and the delegates assembly. In 2019, we will be working on two new issues -- affordable housing and racism in the Worcester Public Schools' disciplinary practices, which will bring us into contact with new people. Starting in March, we're going to be organizing "town hall" like meetings to talk about the Ten Year Agenda, which will also attract new people. Leadership development will be central to these efforts and will provide us with a means through which to develop a whole new cadre of leaders, who can take on various leadership roles in the organization.

## **I. Interim Report and Proposed Goals and Strategies**

**\*PLEASE READ - IMPORTANT CHANGES MADE IN 2014\*** CCHD recognizes the difficulty of identifying specific goals in December for work twelve-sixteen months later. Therefore, in the section below, you will note that we are only asking to see goals for the remainder of the current grant year (Jan-June), and the first sixth months of the proposed grant year (July-Dec). Our grant year has not changed; it remains July 1-June 30. If approved for funding in the proposed grant year, you will be asked for goals for the second half of the grant year (Jan-June) on the Interim Report/Application form due next December.

The Interim Report covers the first half of the grant year (July 1-Dec. 31, 2018) and highlights organizational accomplishments from the start of the grant on July 1st through December 1st. In each of the following three categories restate your goals from your previous year's application in bullet format and briefly describe the progress made in the first half of the year.

This section of the application also serves as your application for the coming grant cycle. You are required to describe your organization's goals for the remainder of the current grant year (Jan - June) AND the first half of the proposed grant year (July - Dec). Please note that goals for the first half of the 2019-20 grant year (July 1 - Dec 31, 2019) can be amended at the start of the grant year.

### **Institutional Change INTERIM REPORT for July 1 - December 31, 2018**

#### **Progress on Institutional Change Goals since July 1**

In bullet format briefly restate the goals outlined in your previous application and the progress made on them. (Limit 500 words)

A. Youth Jobs: We held a successful Youth Jobs Rally in February, again bringing the largest contingent of youth to the State House. The YouthWorks funding we secured from the Commonwealth provided employment to 6,000 youth. In Worcester, we employed around 300 youth.

B. Living Wage Jobs: We helped win the Fight for \$15. We ensured that another \$300,000 was added to the Worcester Jobs Fund. We ensured that training programs were developed to provide workforce development for women, youth, people of color and those of low-income and/or newcomer status.

C. Jobs Not Jail: We worked as part of a 130-member coalition to change multiple pieces of legislation that make it difficult for ex-offenders to gain employment, housing, etc.

D. Refugee Work: Out of the work we were doing with refugees arose a need to focus on affordable housing, particularly as the downtown Renaissance has resulted in a shortage of affordable housing and the displacement of many residents as new condos and apartments are built and rents skyrocket in existing units.

### Institutional Change Achievement since July 1

If your organization achieved some institutional change during this period, answer in bullet format the three questions below. If you are reporting on multiple institutional change outcomes, please identify them separately and under each address the three questions below.

(1) What type of institutional change was achieved? (2) How many people are impacted by this change? (3) If relevant, what is the estimated monetary value of the change? (Limit 300 words.)

A. Youth Jobs: (1) Type of institutional change: leverage funding, secured legislators' support. (2) # of people impacted: 6,000 MA youth. (3) Value of change: \$12M.

B. Living Wage Jobs: (1) Type of institutional change: helped win the Fight for \$15, leveraged funding, established training programs, provided workforce development. (2) # of people impacted: minimum wage increase- over 1 million workers; workforce development training - 161 adults. (3) Value: of minimum wage campaign – millions; of training - \$300,000.

C. Jobs Not Jail: (1) Type of institutional change: there are numerous pieces of legislation at some stage of reformation. We continue to work with a coalition of 129 other MA institutions to reform these laws. (2) As of 1/1/18, there were 8,494 people in MA state prisons. (3) It is impossible to calculate the economic repercussions of the impact of these laws.

D. Refugee Work: Out of the work we were doing with refugees arose a need to focus on affordable housing, particularly as the downtown Renaissance has resulted in a shortage of affordable housing and the displacement of many residents as new condos and apartments are built and rents skyrocket in existing units.

### Voter Registration\ Voter Education Get Out the Vote (GOTV)

Please indicate if your organization engaged in voter registration and/or voter education or GOTV activities during first half of the grant year. If so, provide a brief description of those activities. If your organization did not participate in GOTV activities, enter N/A. (Limit 250 words)

We held a Candidate's Night this fall for local city councilor candidates.

### Institutional Change GOALS for January 1 - December 31, 2019

#### Background for Institutional Change

Provide a narrative that offers a full, comprehensive picture of the institutional change work your organization is currently engaged with. Be sure to describe all issues you are researching and actions you are developing or have recently had. Please also include a description of other organizations, institutions, or public figures who are likely to be supportive or to challenge your efforts. (Limit 500 words)

We believe that economic development MUST equal community development. As the Renaissance sweeps through the downtown core of Worcester, many people are being displaced as new units go up and rents increase in existing ones. Affordable housing has become a dirty word in Worcester. The city claims that we have a sufficient stock, yet we hear an increasing number of stories from our clergy about families who are being evicted and cannot find a safe, affordable place to live. Current data – including a two-year wait list at the Worcester Housing Authority -- supports this. Soon, we'll have a baseball stadium in Worcester, which is impacting another low-income neighborhood, Green Island. The city will be taking land – including some houses -- through eminent domain, and landlords are already increasing rents in anticipation of the gentrification that will happen as hotels, restaurants and shops begin to

pop up. The city was handing out TIFs to developers like you'd hand out candy on Halloween, but Worcester Interfaith put a stop to this. Several years ago, we successfully negotiated a deal with the city to set aside a % of each TIF into the Job Trust Fund, which is used to provide workforce development to those being left behind by the economy – specifically women, youth, newcomers, people of color and those of low-income status. As a result, these people have been able to get training for existing and emerging living-wage jobs, including at the Department of Public Works, as customer services reps, foreign language medical interpreters, in the building trades, and the restaurant and hospitality industry. We will continue to work on the issue of workforce development and access to employment for both youth and adults. In addition to this, we'll begin work on two educational issues – the first is the lack of access to vocational education for Worcester high school students, as the VoTech only accepts 50% of the students who apply. Given that 98% of their students go on to college, this leaves the traditional vocational student with nowhere to get the training they need to enter the trades. There is also a serious concern about the disproportionate number of students of color who receive detentions, suspensions and expulsions in the Worcester Public School system. In addition to this work, we plan to revisit our board, membership, and dues structure, increase outreach to diverse congregations and congregations of color, and bring the Ten Year Agenda to Worcester.

#### Institutional Change Goals for January - December 2019

Outline your implementation plans for each goal for the proposed grant year. Under each goal, describe the objectives, strategy, and activities/tasks that will be followed during the proposed grant year. (Limit 300 words)

**YOUTH JOBS:** Organize and attend the Youth Jobs Rally in February 2019; have at least 10 youth speak with their legislators about the importance of youth jobs. Leverage at least \$12M in YouthWorks funding. Provide pre-employment training and jobs for up to 300 youth during the summer of 2019. Organize a legislative tour of job sites in August 2019.

**PUTTING WORCESTER TO WORK:** Organize at least 5 training programs for adults that will enable them to access living-wage jobs. Provide workforce development training to at least 150 adults.

**AFFORDABLE HOUSING:** Convene an Affordable Housing Coalition. Conduct action research on the stock, cost and availability of affordable housing in Worcester. Explore the various strategies we might use to leverage the millions of dollars being poured into the Downtown Renaissance to create more affordable housing.

**EDUCATION:** (a) Vocational education – identify groups already working on this issue and form a coalition to bring them all together. Conduct research on the need for additional vocational education options and use the outcomes to formulate strategies and a campaign to leverage additional opportunities for youth. (b) Racism in the Worcester Public Schools – identify who's already working on this issue and form a coalition to combine their efforts. Conduct research to gather data on this issue. Formulate a campaign to bring this issue to the Worcester Public Schools.

#### Voter Registration\ Voter Education Get Out the Vote (GOTV)

Please indicate if your organization is planning to engage in voter registration and/or voter education or GOTV activities during the proposed grant year. If so, provide a brief description of

those activities. If your organization will not participate in GOTV activities, enter N/A. (Limit 250 words)

N/A

## **Leadership Development INTERIM REPORT for July 1 - December 31, 2018**

### **Progress on Leadership Development Goals**

In bullet format briefly restate the goals outlined in your previous application and progress made on them. Include a listing of the specific skills or knowledge taught and the names of the trainers. (Limit 250 words)

Through our strategic and succession planning process, we were able to strengthen the leadership and increase the ownership level of our 26-member board. Through the Youth Jobs work, we were able to develop the leadership skills of 12 local youth, who later planned a Candidate's Forum. All training was provided on an informal basis.

### **How has organization's leadership development methods, strategies or curriculums for leadership identification, engagement and development worked or not worked? (Limit 250 words)**

We were incredibly successful in developing the leadership capacity of our 26-member board. Board meeting attendance is at an all-time high and we've gained 3 new institutional members. New clergy coming to town contact us to ask how they can get involved! At our December board meeting, we had 3 new clergy and 2 new lay people attend. All 5 expressed interest in getting more deeply involved with the organization. We are excited by this "quickening" and have no doubt the momentum will increase as we dig in to our work around affordable housing, education, and the Ten Year Agenda.

### **Number of Trainings Held**

Indicate the total number of trainings held during the first half of the grant year.

1

### **Total Number of Leaders Trained**

Indicate the total number of leaders trained during the first half of the grant year.

38

### **Number of New Leaders Trained**

Indicate the number of new leaders trained during the first half of the grant year.

12

### **Percentage of Low-Income Leaders Trained**

Of all the leaders who received training during the first half of the grant year, indicate what percentage were low-income leaders. Enter whole numbers, omitting the percentage (%) sign.

53

## **Leadership Development GOALS for January 1 - December 31, 2019**

### **Leadership Development Goals for January - December 2019**

Outline your specific leadership development goals. Be sure to include any local, regional and national trainings in your response. Outline the specific skills and knowledge you plan to teach, and indicate the persons who will be conducting trainings. (Limit 250 words)

We will continue to engage and train youth, members of the Central MA Youth Jobs Coalition, and the Community Labor Coalition throughout the course of our work on employment for youth and adults. We will provide training to our board members at every other meeting (six times/year). The board and Isabel will determine the topics at the January 2019 meeting. Starting in March, we'll be working on the Ten Year Agenda. A key component of this work is leadership development. Our goal is to engage at least 200 people in the formulation of the Ten Year Agenda for Worcester. Likewise, we will be providing leadership training to the folks who get involved in our work around affordable housing and education. We will also send leaders to MCAN trainings.

### **Total Number of Leaders to be Trained**

Indicate your organization's goal of the TOTAL number of leaders to be trained in the next twelve months.

200

### **Number of New Leaders to be Trained**

Indicate your organization's goal of the number of NEW leaders to be trained in the next twelve months.

100

### **Percentage of Low Income Leaders to be Trained**

Of all the leaders to receive training during the next twelve months, approximately what percentage will be low-income leaders? Enter whole numbers, omitting the percentage (%) sign.

75

## **Organizational Development INTERIM REPORT for July 1 - December 31, 2018**

### **Progress on Organizational Development Goals**

Briefly restate the goals outlined in your previous application and progress made on them.

Include your organization's progress in maintaining, expanding, and/or strengthening your membership base. If your organization has lost individual or institutional members, state the reasons. If your organization has expanded its base, be specific about the geographic area. (Limit 250 words)

Much of our time and energy over the past 18 months was dedicated to executing a successful strategic and succession planning process. During this time, we were able to get the 26 members of the board to really step up in terms of participation, ownership and leadership. They interviewed key stakeholders, spoke with funders, and conducted focus groups. They participated in numerous strategic planning meetings and two retreats, during which we identified the priorities we wanted to work on. These priorities informed the type of person we sought out as our new Lead Organizer and Director. We also put a number of structures, policies and procedures into place. We are pleased to announce that we welcomed our new Lead Organizer and Director, Isabel Gonzalez-Webster, on October 15, and that the transition has been going smoothly.



### Individual Member Recruitment

Indicate the number of individual members recruited in the first half of the grant year. If none, please enter '0'.

0

### Institutional Member Recruitment

Indicate the number of institutional members (e.g. congregations) recruited in the first half of the grant year. If none, please enter '0'.

3

### Relationships and Strategic Partnerships

Describe any new relationships with coalitions, strategic partners and/or key public figures that your organization established during the first half of the grant year. (Limit 250 words)

None.

## Organizational Development GOALS for January 1 - December 31, 2019

### Organizational Development Goals for January - December 2018

Describe plans to build your organization's internal capacity. Include plans to build or expand your internal structures such as organizational board, finance committee, clergy caucus, chapters, etc. (Limit 250 words)

During the coming year, we will be evaluating our board, membership and dues structure, conducting outreach to diverse congregations and congregations of color, all in an effort to be coming a more representative organization. We want to expand and strengthen the board, as well as bring on more lay people. We want to establish active, strategically-oriented committees that align with our work. We will also be rebranding and establishing a more robust communications and social media program so that we can keep people informed of our work.

### CCHD evaluates how groups are planning and acting to maintain, expand and strengthen their membership base.

List any goals your organization has to maintain, expand, and/or strengthen your membership base. Please be specific about the geographic area of any proposed expansion. (Limit 250 words)

We will conduct outreach with diverse congregations and congregations of color (especially "storefront" churches, as they tend to attract people of color and members of immigrant and refugee communities). We will recruit people to participate in our education and affordable housing efforts, as well as the Ten Year Agenda.

### Individual Member Recruitment Goals

For applicants whose membership includes individual members, please indicate the number of individual members to be recruited in the next twelve months. If none, please enter "0."

0

### Institutional Member Recruitment Goals

For applicants whose membership consists of institutions/congregations, please indicate the number of institutions to be recruited in the next twelve months. If none, please enter "0".

3

### Relationships and Strategic Partnerships

Describe any new relationships with coalitions, strategic partners and/or key public figures that your organization plans to develop. (Limit 150 words)

We plan to create at least 2 broad-based coalitions/working groups – one to address the issue of affordable housing, the other to address educational issues.

### Grant Conditions

If a condition(s) was placed on your 2018-19 grant, restate the condition(s) and briefly describe any progress towards meeting it/them. If not, please enter N/A. Please refer to the grant agreement or request update form to respond to progress on grant condition(s).

N/A

## J. Financial Capacity

### Financial Capacity/Fundraising

Your organization's total expenses for each of the past two fiscal years:

FY 17 Expenses: \$80,439

FY 18 YTD Expenses (Jan 1 – Oct 31, 2018): \$98,820

The total amount raised by your organization for each of the past two fiscal years:

FY 17 Revenue: \$168,663

FY 18 YTD Revenue (Jan 1 – Oct 31, 2018): \$69,374 (please note: we ended last year with a significant surplus; in 2016 we received a one-time gift of \$50,000 which we put aside to see us through our leadership transition; and we receive most of our grants revenue in the 3rd quarter)

### Progress on Fundraising Goals since July 1

In bullet format briefly restate the goals outlined in your previous application and progress made on them. (Limit 250 words)

Total Revenue Goal : \$153,773

- a. Member dues \$10,000
- b. Grassroots fundraising \$12,000
- c. Individual donors \$250
- d. Corporations (we include this with grants)
- e. Government sources \$0
- f. Foundations \$135,000

Progress January 1 -October 31, 2018

- a. Member dues \$5,823
- b. Grassroots fundraising \$20,350
- c. Individual donors \$261
- d. Corporations (see below)
- e. Government sources \$0
- f. Foundations From January 1 – October 31, we received the following grants: Country Bank - \$500; Fletcher - \$5,000; Daniels - \$7,500; Hoche-Scofield - \$2,000; Zakim - \$10,000; Price Chopper - \$500; People's United - \$5,000; Stoddard - \$5,000; Unibank - \$500; Webster 5 - \$1,000. Many of our grants come in during the 3rd quarter of the year. We are on track to end the year "in the black."

### Internal Fundraising

Indicate the total amount raised from the following during the first half of the grant year: dues, individual donors, and grassroots fundraising.

26434

### External Fundraising

In bullet format list the names of foundations, corporations and/or government sources and amounts granted during the first half of the grant year. (Indicate new sources with an asterisk.)

Foundations From January 1 – October 31, we received the following grants: Country Bank - \$500; Fletcher - \$5,000; Daniels - \$7,500; Hoche-Scofield - \$2,000; Zakim - \$10,000; Price Chopper - \$500; People's United - \$5,000; Stoddard - \$5,000; Unibank - \$500; Webster 5 - \$1,000. Many of our grants come in during the 3rd quarter of the year. We are on track to end the year "in the black."

### Member Involvement in Fundraising

Describe your organization's plans to involve your leaders and general membership in the development AND carrying out of fundraising activities. (Limit 250 words)

Moving forward, we will be implementing more grassroots fundraising techniques, such as house parties, small scale events, etc. Members will take the lead in organizing these.

### Fundraising Goals

Outline the fundraising goals for the proposed grant year using the format below.

1) Total to be raised for the proposed grant year. (This number should be consistent with the stated organizational budget in Section C, as well as with the proposed budget on the "Budget Form" attachment.)

145057

2) Indicate the total amounts you plan to raise from each of the following sources:

- a. Member dues
- b. Grassroots fundraising (galas, banquets, car wash, etc.)
- c. Individual donors
- d. Corporations
- e. Government sources
- f. Foundations

- a. Member dues: \$10,000
- b. Grassroots fundraising (galas, banquets, car wash, etc.): \$20,000
- c. Individual donors: \$5,000
- d. Corporations
- e. Government sources: \$0
- f. Foundations: \$111,000

3) Referring to the dollar figure in 2.f., list the names of the foundations approached, the amount requested, and if the application has been submitted. If it has not yet been submitted, please denote when you will apply. If not applicable, enter N/A.

Between Jan 1 – Dec 15, 2018, we have submitted applications to the following funders: Country Bank - \$500; Price Chopper - \$500, Webster Five - \$1,000, Schwarz - \$2,500, Stoddard - \$5,000, Fletcher - \$5,000, Zakim - \$10,000, Cornerstone Bank - \$500, Millbury Savings - \$100, Fred Harris Daniels - \$7,500, Hoche-Scofield - \$2,000, People's United – \$5,000, Unibank  
PENDING: TJX (\$5,000), CCHD (\$40,000), GWCF (\$10,000), GWCF – YCI (\$4,000), Leominster Credit Union (\$1,000), RESIST (\$5,000), United Bank (\$5,000), Haymarket (\$10,000)  
REJECTED: Citizen's Bank, Bank of American, MA Woman's Missionary Union, ELCA  
IN 2019, we'll approach all of the above, plus: HC Gemmer Christian Foundation, Presbyterian Fund for the Self Development of People, Ben & Jerry's Foundation, AJ Muste Fund, UU Fund for a Just Society, Episcopal City Mission - Burgess Urban Fund, Albert Rice, Berkshire Bank, Bay State Savings, Clowes

## **K. Organizational Affiliations & Coalitions**

CCHD encourages groups to work across geographical, racial, ethnic, economic and ideological lines to overcome poverty and advance the common good. However, CCHD cannot fund groups that are part of coalitions or other

organizations with purposes or agendas that conflict with fundamental Catholic social and moral teaching.

## **Affiliations & Coalitions**

### **Community Organizing Network Affiliation**

Select one affiliation. If your organization is not affiliated with any national or regional community organizing network, select NO AFFILIATIONS.

Other

### **Other Affiliations**

Please list any national, regional, state or local coalitions, networks or other organizations that your group has membership in and the nature of your participation. If your organization pays dues or fees to any member organization, please list the organization and the amount you contribute (Limit 250 words).

Faith in Action – through MCAN, we are part of Faith in Action (formerly PICO).

We also participate in Raise Up MA campaigns.

We chair the Worcester Community Labor Coalition, which is comprised of 30 organizations. Our primary focus is leveraging workforce training and employment opportunities for adults.

We chair the Central MA Youth Jobs Coalition, which is comprised of 25 organizations and focuses on training and employment for youth.

Does your organization provide funding to any other organization(s)? If so, please identify each funded organization, your organization's relationship with each, and the amount of funding provided to each. If not, enter N/A.

N/A

## **Technical Assistance**

If your organization is working with a T/A provider and/or network, please answer the remaining questions. If your organization is affiliated with a national or regional organizing network and receives support/supervision from regional staff, please include their information below. If you have no technical assistance provider, please leave the following fields blank.

First Name

Last Name

### **Services Provided and Cost**

Describe the specific services being offered by your technical assistance provider AND the estimated cost of each service.

Relevant Experience

Describe the expertise, skills, and other relevant experience of your technical assistance team.  
(Limit 100 words.)

#### Website

If your technical assistance provider (either individual or organization) has a website, provide the URL here.

### **L. Concurrence**

All applicant organizations must read and indicate their consent to the following agreement as a part of their application submission.

Those submitting online grants or refund applications, submitting responses to the CCHD "Pre-Application" or otherwise interacting with CCHD and/or USCCB by way of providing information above, understand and agree that these applications and submissions are all made in the District of Columbia. It is further understood and agreed that all grants, awards, refunds or business decisions regarding these issues, are made in the District of Columbia. Further, it is understood and agreed that any and all claims arising from these grants or refund applications, the CCHD "Pre-Application," or otherwise relating to the provision of information above, will be governed by and construed in accordance with the laws of the District of Columbia.

It is further understood and agreed that the sole jurisdiction and venue for any litigation arising out of or relating to any such applications, grants, refunds, participation in the "Pre-Application" or the provision of information above, will be in an otherwise appropriate federal or local court located in the District of Columbia.

In the event that any portion of this Agreement is held unenforceable, that unenforceable portion will be construed in accordance with applicable District of Columbia law so as to, as nearly as possible, reflect the expressed original intentions of the parties, and the remainder of the provisions will remain in full force and effect.

By submitting the above application for a grant or refund, submitting responses to the "Pre-Application" or otherwise providing information, the submitter or provider agrees to all of the above conditions.

Check the box below to indicate your agreement with the above statement.

Yes

### **Attachments**

Title	File Name
Budget	Worcester Interfaith_2019 Budget for CCHD_December 15 2018.xlsx
Board Member Profiles	Worcester Interfaith_cchd-board-profile_Dec 2018.doc
Board Meeting Minutes	Board Meeting Notes from June 20 2018.docx
Board Meeting Minutes	Board Meeting Notes from July 25 2018.docx
Board Meeting Minutes	Board Meeting Notes from Aug 29 2018.docx
Board Meeting Minutes	Board Meeting Notes from Sept 27 2018.docx
Board Meeting Minutes	Board Meeting Notes from October 25 2018.docx
Interim Report Expense Form	Worcester Interfaith_Community Development Interim Expense Form_Dec 15 2018.xls
Form 990	990-2017_Worcester Interfaith.jpg
Most Recent Financials: Balance Sheet & Profit/Loss Statements	OCT 2018 Balance Statement.pdf
List of Institutional Membership	2018 Board List_As of June 1 2018.doc
Board Meeting Minutes	November 29,2018 Board Notes.docx
Board Approval of CCHD Application	Worcester Interfaith_cchd-grant-board-approval-form_Dec 2018.docx