



**CATHOLIC CHARITIES OF THE ARCHDIOCESE OF CHICAGO
STRATEGIC PLAN
2014-2018**

Approved by the Board of Directors
December 11, 2013

STRATEGIC PLAN 2014-2018

CATHOLIC CHARITIES OF THE ARCHDIOCESE OF CHICAGO

INDEX

3	HISTORY OF ENGAGEMENT
5	GLOSSARY
7	MISSION AND VALUES
8	VISION STATEMENTS
9	GOAL STATEMENTS: AGENCY DIVISIONS AND PROGRAMS
10	Children, Youth and Family Services
12	Community Development and Outreach
14	Family and Parish Support
15	Housing
16	Senior Services
18	GOAL STATEMENTS: ADMINISTRATIVE AND SUPPORT SERVICES
19	Board and Volunteer Relations
20	Communications
21	Development
22	Employee Assistance Program
23	Facilities
24	Finance
25	Government Relations
26	Human Resources
27	Information Systems Group
28	Management Information Systems
29	Office of Latino Affairs
30	Performance Quality Improvement (PQI)
31	Regional Services

HISTORY OF ENGAGEMENT

1. History. Catholic Charities of the Archdiocese of Chicago has benefitted from the foresight of the agency's leadership, administration and Board of Advisors in that Strategic Planning has been an organic part of the agency's structure for many years. Starting with the vision of veteran Board of Advisors member (and past Chair) Dr. Louis Glunz, the agency adopted the process in 1998.

Utilizing professional facilitators, the planning process has been board-sponsored and resulted in four completed Strategic Plan sequences by 2013. The growth, focus and direction of the agency have been clearly encapsulated in the process. Staff members have admirably taken ownership of the process, together with ongoing analysis of the outcomes. The people in need served by Catholic Charities of the Archdiocese of Chicago have benefited in tangible ways, constantly adapting to changing sociological, demographic and economic conditions. The Strategic Planning experience has greatly enhanced our mission of charity to anyone in need.

2. Background. In September 2011, the Strategic Planning Committee of the Board of Advisors recommended that as the 4th Strategic Plan would end as of December 31, 2013, the committee would assume the responsibility for conducting such activities necessary in formulating the agency's 5th Strategic Plan. Given the unique availability of trained and experienced planning professionals already serving as members of the Board of Advisors, the committee recommended that this cycle of Strategic Planning be facilitated "in-house" using the talents of existing Board Members on a pro bono basis, so that the agency would not need to fund the services of an outside professional facilitator. The Board of Directors approved the proposal and the Strategic Planning Committee undertook the project. The Committee has gone on record with the position that utilizing an outside facilitator is a preferred method of conducting Strategic Planning and that future planning exercises always consider the benefits of an impartial, trained, professional facilitator.

3. Process. Beginning in Spring 2012 and continuing throughout 2013, the Strategic Planning Committee conducted personal interviews as well as focus group sessions with representatives from all major stakeholders, managers, administrators and clients of Catholic Charities of Chicago. The focus group sessions were conducted to analyze the strengths, weaknesses, opportunities and threats facing the agency, as well as individual divisions within the agency. Through the process, the main visions needed for the future emerged and were refined through supporting vision fundamentals which provide the logistical means for the divisions to achieve the goals. An unprecedented number of agency members were consulted in the process, which was refined and constantly prioritized and re-prioritized until consensus was achieved.

In the 15-month long process, we achieved the following:

- All Senior Administrators were personally interviewed
- Focus Group Sessions were conducted, which included representatives of the following groups:
 - ✓ *Administrative Staff*
 - ✓ *Board of Directors*
 - ✓ *Child, Youth and Family Services Managers and Staff*
 - ✓ *Catholic Charities Clients*
 - ✓ *Community Development and Outreach Managers and Staff*
 - ✓ *Family and Parish Support Services Managers and Staff*
 - ✓ *Residential Housing Managers and Staff*
 - ✓ *Senior Services Managers and Staff*
- Draft Visions were completed, prioritized, reviewed by Msgr. Boland and Administration
- Specific goals were posited, drafted, redrafted, and assigned
- Final draft presented to the Board of Directors for approval

4. **Acknowledgments.** The plan is the work of the following people who are deeply appreciated for their commitment to the mission of Catholic Charities of the Archdiocese of Chicago:

Focus Group Facilitators: Claudia Mann, George Langlois, Robert Morris, Marco Tavanti.

Logistics, Liaison and Support: Kathy Donahue and Maria Radjevic

Strategic Planning Committee: Keith Armato, Kathy Donahue, Mary S. Feeley, Martha Fitzgerald, Louis Glunz III, George Langlois, Claudia Mann, Robert Murphy, Richard Sevcik, David Smith, Robert R. Morris (Chair).

Submitted, September 20, 2013

Operational: January 1, 2014 through December 31, 2018

GLOSSARY

The plan was developed using the following framework.

- **Mission:** definition of who we are and why we exist.
- **Values:** the set of core behaviors guiding our treatment of everyone our agency engages
- **Purpose:** describes the aspiration for our work – the impact we hope to make in the lives of the individuals, families and communities that we are focusing on in this plan.
- **Operating Principles:** philosophies by which we direct, manage and measure the success of our organization.
- **Visions:** “snapshots” of our strategic intent – what we want to accomplish in the next 4 years.
- **Strategies:** description of initiatives we will take to achieve visions.

Purpose: *To reduce poverty, promote human dignity, strengthen individuals, families, and empower communities.*

Operating Principles - *provide philosophy and guidance for how we direct, manage and measure the success of our organization.*

- **Operating from our Catholic identity and our core values:** We are rooted in Sacred Scripture and follow the Church’s long tradition of Respect, Compassion, Competence and Stewardship.
- **Integral to the Archdiocese:** As the social service arm of the Catholic Church in the Chicago-land area we strive to give witness to the Gospel by collaborating with Parishes in the service of the most vulnerable; Catholic and Non-Catholic.
- **Promoting a Culture of Life:** Our services help uphold the inherent dignity of human life from conception to natural death.
- **Commitment to the Poor:** In fidelity to the Social Doctrine of the Church, Catholic Charities is committed to reducing poverty, especially for the individuals, families and communities we serve.
- **Evidence-based Program Performance:** We manage and evaluate the performance of our programs and individuals on the basis of outcomes and impact, not activity. We impact lives, rather than numbers, and strive to constantly humanize our work while incorporating meaningful continuous improvements.

- **Visibility:** We use a unified message and voice to “present” the organization. We are broadly visible within communities through our strategically based service sites.
- **Collaboration:** Whenever possible, we collaborate internally when it makes strategic sense, collaborate with other organizations, particularly Catholic and parish based organizations.
- **Reducing risk and promoting best practices and maintaining safe and welcoming facilities**
- **Engaging Board Members and Volunteers** as integral to our system of care.
- **Affirm the value of diversity and strive to provide culturally sensitive services and culturally competent language capabilities** by targeting purposeful diversity initiatives.
- **Stewardship:** We manage from a commonly understood financial framework, seek efficiencies in our operations, balance expenses and revenues, focus on our financial performance through a long-range analysis of costs, and support endowment growth.
- **Valuing Technology:** We seek a uniform technology standard at all sites to benefit clients and operations. We provide technology training and tools for all employees to enhance their effectiveness. We continue to explore creative use of software, hardware and innovations in paperless, wireless and more efficient systems.
- **Ethical Behavior:** We ensure ethical, legal and non-discriminatory behavior in regard to all of our constituents: clients, employees, funders, volunteers, board members, suppliers.
- **Professional Staff:** We are committed to hiring professional, well-trained, mission-driven, results-orientated, innovative and collaborative staff.
- **Funding:** We pursue, evaluate and accept funding that is congruent with our mission and values. We analyze funding to ensure that acceptance is cost-effective and includes a long-range analysis of costs.

MISSION AND VALUES

Catholic Charities Mission

Catholic Charities fulfills the Church's role in the mission of charity to anyone in need by providing compassionate, competent and professional services that strengthen and support individuals, families and communities based on the value and dignity of human life.

Catholic Charities Values

In order to remain faithful to our mission, Catholic Charities is guided by these core values:

- ❖ Respect
- ❖ Compassion
- ❖ Competence
- ❖ Stewardship

PURPOSE AND OPERATING PRINCIPLES

Catholic Charities Purpose

To reduce poverty, promote human dignity, strengthen individuals, families, and empower communities.

Catholic Charities Operating Principles

The set of parameters which incorporate the agency's philosophy and provide guidance for how we direct, manage and measure the success of our organization.

VISIONS

Catholic Charities Visions

Catholic Charities of the Archdiocese of Chicago proclaims and improves its mission of charity to anyone in need through the following:

1. **Embracing Change** in response to the shifting demographic and societal circumstances affecting our clients; a broad review of the organizational and relational realities of our governmental partners; and the critical importance of internal organizational structure to respond to needs.
2. **Improving Communications** by effective coordination of information about potential and existing clients and the services we provide to them, as well as the general identity, awareness of and understanding of our role in society and as a proactive ministry of the Catholic Church.
3. **Enhancing Finances** through broader diversification of funding, with the aim of solidifying finances through effective coordination with government agencies and the expansion of partnerships to achieve better efficiencies.
4. **Providing Innovation** through study and implementation of best practices and dynamic creativity to respond to the rapid changes affecting our clients as well as societal and governmental challenges.



SERVICE AREAS

Child, Youth and Family Services

Child, Youth and Family Services is committed to helping the agency fulfill its mission through the following initiatives:

1. Integrate a trauma informed approach throughout the service group.

Target year of completion: 2018

Who is Responsible? VP - Child, Youth and Family Services

Measurements:

of trainings provided

of participants

of parent/client workshops

of participants

of parent/client discussion groups

of participants

Trauma approach institutionalization

2. Increase support for our employees serving children and families impacted by trauma and community violence and those working in communities experiencing high violence.

Target year of completion: 2018 (although really ongoing)

Who is Responsible? VP - Child, Youth and Family Services

Measurements:

of Agency Safety Trainings offered

of participants

Integration into supervision

Implementation of Peer support

Discussions in program and service group meetings

Referrals to EAP

Enhanced response to acute events

Identify, review and implement methods to address vicarious trauma from literature such as “Understanding and Addressing Vicarious

Trauma” from the

Headington Institute

Child, Youth and Family Services

3. Implement continuous quality improvement projects in our Child Care and Head Start programs.

- a. Prepare for state of Illinois implementation of ExceleRate Illinois, the new quality rating and improvement system in order to maximize Circle of Quality levels at all centers.

Target Year of Completion: 2017

Who is Responsible? VP - Child, Youth and Family Services

How this will be measured: quality measures defined and accomplished

- b. Obtain NAEYC accreditation at Our Lady of Lourdes – Early Childhood Center

Target Year of Completion: 2015

Who is Responsible? Site Director

How this will be measured: accreditation letter

- c. Obtain NAEYC accreditation at St. Aloysius – Early Childhood Center

Target Year of Completion: 2016

Who is Responsible? Site Director

- d. Research, develop and pilot a structured dual-language early childhood education program at designated centers.

Who is Responsible? VP - Child, Youth and Family Services

Target Year of Completion:	2014	2015	2016
How this will be measured:	Research completed	Develop plan	Pilot project

Community Development and Outreach Services

Community Development and Outreach Services is committed to helping the agency fulfill its mission by:

- Preparing for changes in demographic, climate, economic, and political landscapes.
- Increasing public awareness of mission and programs, promoting partnerships and community collaborations, and diversifying funding resources.
- Enhancing the talent of service area staff through professional development training and increasing the use of staff strengths across the service area.
- Optimizing building space for additional program use and improving service area technology to enhance program efficiencies.
- Remaining at the forefront of social enterprise and social media initiatives, program growth and development opportunities, and best practice research and implementation.

Goal Statements

1. Improve access to healthy food options and alternatives through fully integrated nutrition service systems at WIC Centers.

a. Introduce ability to process SNAP payments at WIC centers.

Target Year of Completion: 2014

Who is Responsible? Vice President

How this will be measured: clients used Link Cards at WIC Centers

b. Partner with Notre Dame to produce research and evaluation regarding community nutrition and maternal and child health.

Target Year of Completion: 2017

Who is Responsible? Vice President

How this will be measured: Research Analysis Report

c. Demonstrate continued need for community nutrition programs through promotion of WIC outcomes.

Target Year of Completion: 2017

Who is Responsible? Vice President

How this will be measured: Position Paper

d. Increase WIC participation through the incorporation of co-located programs and referral resources.

Target Year of Completion: 2017

Who is Responsible? Vice President

How this will be measured: Number of clients served; Number of added services

Community Development and Outreach Services

2. Establish safe community environments for youth, providing exposure to on-the-job training, professional development courses, and enrichment activities.

a. Partner with local community efforts, including One Summer Chicago and the Community Violence Prevention Program, to enhance youth interpersonal skills, increase community involvement, and promote non-violent alternatives.

Target Year of Completion: 2017 (on-going) *Who is Responsible?* Assoc. VP, Dir. of Youth Development

How this will be measured: Number of partnerships, community collaborations

b. Provide professional development education sessions that include topics such as career planning, teamwork, communication, time management, and problem-solving.

Target Year of Completion: 2017 *Who is Responsible?* Assoc. VP, Dir. of Youth Development

How this will be measured: Design Professional Development Curriculum and training modules

c. Enlist volunteers with various interests and professional backgrounds to act as youth mentors, coaches and role models.

Target Year of Completion: 2015 *Who is Responsible?* Assoc. VP, Dir. of Youth Development

How this will be measured: Develop Youth Development Volunteer Database

3. Develop a comprehensive workforce and professional development institute for internal and external training purposes.

a. Collaborate with Agency Service Areas to design training curriculums that address universal workforce issues.

Target Year of Completion: 2017 *Who is Responsible?* Vice President , Assoc. VP,

VP - Family and Parish Support Services,

VP - Housing Services,

Dir. of Staff Development

How this will be measured: Curriculum Development

b. Obtain certification through the Illinois Workforce Investment Act.

Target Year of Completion: 2017 *Who is Responsible?* VP, Assoc. VP

How this will be measured: Certification

c. Develop marketing plan to promote training institute to external organizations.

Target Year of Completion: 2017 *Who is Responsible?* VP, Assoc. VP

How this will be measured: Marketing plan document

Family and Parish Support

1. Family & Parish Support Services is a valued and thriving partner in the area of mental health and social services.

Strategy: Position behavioral health services to serve clients through emerging healthcare models.

Target Year of Completion: 2014 ongoing to 2018

Who is Responsible? (VP & Assoc. VPs)

How this will be measured:

- a) Increase membership in insurance networks/third party payments.
- b) Expand services to target populations to include the underserved in new healthcare market place
- c) Explore and secure new private and governmental funding sources in collaboration with development and government relations.

2. Family & Parish Support Service consumers are benefitted by a holistic and coordinated model of care across an integrated service area continuum. *Strategy:* Assess and redesign intake function to improve client access.

Target Year of Completion: 2014 ongoing to 2018

Who is Responsible? (VP & Assoc. VPs)

How this will be measured:

- a) Improve front end client access and referral across service area programs
- b) Develop a central and/or coordinated point of entry and referral for behavioral health services
- c) Pursue additional opportunities for expansion of Prevention Call Center including 211
- d) Improve ability to leverage technology, including web page and social media in outreach and service to clients
- e) Enhance coordination with regional staff particularly around food pantry and intake function

3. Family & Parish Support Services are known for their strong partnerships with parishes, faith based organizations and other Catholic sponsored ministries. *Strategy:* Strengthen partnerships with Catholic community and outreach to other faith-based organizations

Target Year of Completion: 2014 ongoing to 2018

Who is Responsible? (VP and Assoc. VPs)

How this will be measured:

- a) Increase services to Parishes, Catholic Schools and other Catholic ministries targeting parish clusters in current locations
- b) Strengthen staffing and services provided to callers who utilize parish line
- c) Creation of educational materials geared toward client specific needs in faith based communities (dependency, domestic violence, maternity/adoption, etc.)
- d) In coordination with Program Development & Regional Services, identify joint projects to do with parishes & other ministries
- e) In coordination with Communication Department increase visibility and parish referrals for Holbrook Counseling Center Services

Housing

- 1. Diversify funding sources for supportive services and building acquisition/maintenance throughout the Service Area, while maintaining current government sources. Increase knowledge and accessibility for obtaining Medicare and Medicaid for relevant programs.**

Target year of completion: 2015 ongoing to 2018

Who is responsible? VP, (Team includes, Controller, Assoc. VPs, Managers, Senior management, CC Development)

How will this be measured: By number of additional funding sources, Budget process, measuring budget variances quarterly.

- 2. Develop Technical systems that address the diverse business, reporting and statistical needs of all programs.**

Target year of completion: 2015, ongoing to 2018

Who is responsible? VP, Assoc . VPs, Managers, partnership with CC IT and MIS Depts.

How will this be measured? Number of active and working systems, PQI and MIS Reports

- 3. Optimize the opportunities for employees to receive housing skill development training including blended management, client center approach, accreditation and compliance standards**

Target year of completion: 2015, ongoing to 2018

Who is responsible? VP, Assoc. VPs, Managers, partnership with CC Staff Training and Development

How will this be measured? Training attendance, multi-disciplinary meetings, customer satisfaction, compliance certifications

- 4. Increase the housing capacity of the Service Area.**

Target year of completion: 2018

Who is responsible? VP, Assoc. VPs, Senior Administration, Development, Controller

How will this be measured? Increased number of units; Increased number of clients served by Case Management

Senior Services

The Division of Senior Services is committed to helping the agency fulfill its mission through the following initiatives:

1. Expand current programming into new geographic areas and client populations.

a. Integrate the disabled population into current programs by increasing the number of disabled adults.

Target Year of Completion: 2014-2015

Who is Responsible? Vice President and Associate Vice Presidents

How this will be measured:

This will be measured by running reports in CTS. We will track the number of disabled adults we service each year and publish the increase.

b. Expand current programs into new geographic areas.

Target Year of Completion: 2014-2016

Who is Responsible? Vice President and Associate Vice Presidents

How this will be measured:

This will be measured by running reports in CTS. We will run reports showing each zip code where services are provided and compare to the base report.

2. Increase external and internal collaborations.

a. Pursue new external partnerships that align with our Mission.

Target Year of Completion: 2015

Who is Responsible? Vice President and Associate Vice Presidents

How this will be measured:

This will be measured by comparing the number of current collaborations with the number of collaborations at the end of the period.

b. Expand internal service integration committee work.

Target Year of Completion: 2016

Who is Responsible? Vice President and Associate Vice Presidents

How this will be measured:

This will be measured by comparing the number of current internal work committees with the number of internal work committees at the end of the period.

Senior Services

3. Diversify funding by increasing private pay options, entrepreneurships, and support through grants and foundations.

- a. Create an outreach plan to attract new private pay clients.
- b. Increase the number of private pay home care clients.

Target Year of Completion: 2014-2017

Who is Responsible? Vice President and Associate Vice President

How this will be measured:

This will be measured by running reports in our HomeTrak system showing the current number of private pay clients, and then tracking the increase in private pay clients each year.

- c. Increase the number of private pay adult day care clients.

Target Year of Completion: 2015-2017

Who is Responsible? Vice President and Associate Vice President

How this will be measured:

This will be measured by running reports in CTS showing the current number of private pay clients, and then tracking the increase in private pay clients each year.

- d. Explore new funding opportunities for transitional care services.

Target Year of Completion: 2015-2017

Who is Responsible? Vice President, Assoc. VP

How this will be measured:

This will be measured by comparing the current number of hospitals in which we provide transitional care services with the number of hospitals at the end of the period.

- e. Contract with Managed Care Organizations through our Coordinated Care Alliance to improve care coordination services to eligible clients.

Target Year of Completion: 2015-2017

Who is Responsible? Vice President, Assoc. VP

How this will be measured: # of executed contracts



ADMINISTRATIVE AND SUPPORT SERVICES

Board and Volunteer Relations

- 1. The Advisory Board and Junior Board will be deeply engaged through increased member participation through development of a welcoming “onboarding” program.**

Target Year of Completion: 2018

Who is Responsible? Director of Board Relations

How this will be measured: New Board Candidates will be matched with a Board Friend/Board Buddy

- 2. The Advisory Board and Junior Board will be deeply engaged in recruitment of diverse and dedicated members.**

Target Year of Completion: annual measurement

Who is Responsible? Dir. of Board Relations, Dir. of Latino Affairs, Dir. of Junior Board, Dir. of Volunteer Relations

How this will be measured: # of new targeted members recruited

- 3. Increase diverse volunteer opportunities will be created and offered through site visits, meetings with program staff, and a hospitality initiative.**

Target Year of Completion: 2018

Who is Responsible? Lisa Jerzyk, Zulma Colon, Dalia Rocotello

How this will be measured: # of new opportunities developed

- 4. We will engage external partners and build relationships with outside agencies including families, schools and corporations, through the use of the newly developed *Volunteer Bridge* web tool.**

Target Year of Completion: 2018

Who is Responsible? Dir. of Board Relations, Assistant to Director of VR

How this will be measured: # of newly engaged entities

- 5. Together, the Volunteer Relations Department, Regional Offices and Service Areas will implement the new policy and volunteer processes throughout all agency programs.**

Target Year of Completion: 2014-2015

Who is Responsible? Dir. of Volunteer Relations, Assistant to Dir., Chief of Staff, Senior Dir. of Regional Services, Regional Directors and Service Area Vice Presidents

How will this be measured:

Track the number of records/files maintained in Volunteer Relations Office, volunteer retention in the regions and at the program level, and positive volunteer survey results.

Communications

1. **Position Catholic Charities as *the leader* in Midwest nonprofits – administration and service areas- and the most trusted partner with the community, businesses, donors and other social service agencies.**
 - a. Develop and proactively pitch and secure media coverage on the overall agency as well as the various service areas.
 - b. Create speaker bios for agency and board leaders and secure speaking engagements at local, regional and national conferences.
 - c. Work closely with Development and Programs to identify key programs and services to highlight in communication based on program results and funding.
 - d. Evaluate and revamp communication pieces as necessary to more succinctly tell the Catholic Charities story, history, unique attributes, and leadership.

How Measured: Year to Year comparison of media coverage, speaking engagements and key message placements in media coverage.

Timeline/Completion: Ongoing, evaluated on an annual basis

Person Responsible: Director of Communications

2. **In preparation for the 100th anniversary, ensure consistent messaging and branding of the agency so all are speaking in one clear voice.**
 - a. Complete an inventory of all marketing and communication pieces across the agency.
 - b. Perform an external analysis of the agency to determine audiences, current perception and needs/areas for growth.
 - c. Complete an internal analysis of the agency to identify areas of strength and weakness and opportunities for growth.
 - d. Develop internal and external communication protocols.

How Measured: Conduct surveys before and after analysis of perception of Catholic Charities to determine if perception aligns with our “reality” and goals.

Timeline/Completion: 2014

Person Responsible: Director of Communications

3. **Increase the public’s understanding of Catholic Charities’ service offerings and what differentiates the agency from other nonprofits.**
 - a. Increase the use of social media, quick response (QR) codes, video and other tools in press and marketing pieces to further tell the Catholic Charities’ story.
 - b. Expand and improve the current agency website and promote the website as a go-to source for nonprofit and service area trends and information for reporters and the Chicago community.
 - c. Evaluate current service area and program messaging to ensure unique attributes are clear and concise.

Person Responsible: Kristine Kappel

How Measured: Monthly review of website hits and what pages are most visited on the website as well as tracking social media mentions and new followers.

Timeline/Completion: Ongoing, evaluated on a monthly basis

Person Responsible: Director of Communications

Development

The Development Department helps facilitate the Church's role in the mission of charity by:

- Securing financial resources for the program, operations, and endowment of Catholic Charities.
- Providing board members, individuals, organizations, parishes, corporations and foundations with opportunities to fulfill their charitable desires.
- Articulating the needs of those we serve through written and oral communications that invite the greater community to the mission of charity by offering their gifts of time, talent and treasure.

Goal Statements

1. **Increase donations from current, lapsed and new donors from Foundations, Individuals and Corporations for program and event sponsorships and unrestricted support.**

Target Year of Completion: Annual (FY14-FY18)

How this will be measured: Tracking of donor giving by donor type.

Who is responsible: Director of Development, Director of Annual Fund, Associate Director, Director of Foundations and Corporate Relations, Director of Donor Relations, Director of Regional and Program Special Events

2. **Conduct a Feasibility-Readiness Assessment for the fund raising component of the 100th Anniversary Campaign and create a Campaign Fundraising Committee.**

Target Year of Completion: Annual (FY14-FY18)

How will this be measured: Number of individuals on committee and number of prospects assessed.

Who is Responsible: Director of Development

3. **Increase Special Event revenue, sponsorship opportunities, attendance, and committee membership for signature, program and regional events.**

Target Year of Completion: Annual (FY14-FY18)

How will this be measured: Track revenue raised, sponsorships, attendance, and committee membership.

Who is responsible: Director of Development, Director of Donor Relations, Director of Regional and Program Special Events, Associate Director

Employee Assistance Program

1. **Employees will develop matched savings and assets through an implemented Asset Development program**

Target year of completion: 2015

Who is responsible: Director

How will this be measured: # of employees enrolled in savings match

2. **Intranet page will be developed with resources and prevention topics for employees to read.**

Target year of completion: 2015

Who is responsible: Director

How will this be measured: Measured by posted materials on the Web page

3. **Each year 3 prevention trainings will be held on topics related to the highest identified problems for employees to attend**

Target year of completion: 2015

Who is responsible: Director

How will this be measured: # of presentations

Facilities

1. Initiate National Incident Management System Framework

Target Year of Completion: 2017 *Who is Responsible?* Director of Facilities Services
How this will be measured: All Safety Council members trained on NIMS

2. Improve vehicle management process

Target Year of Completion: 2015 *Who is Responsible?* Director of Facilities Services, MIS, HR
How this will be measured: comprehensive manual produced

3. Increase satisfaction with Facilities Management

Target Year of Completion: 2015 *Who is Responsible?* Office Manager/Supervisor
How this will be measured: satisfaction surveys

Finance

1. Automate billing process to accelerate billing and collection.

Target year of completion 2015

How will this be measured? Successful implementation

Who is responsible? Director of Finance

2. Enhance Finance Web Portal

Improve functionality of the Finance & Accounting intranet webpage to facilitate document retrieval of financial transactions for billing and external auditing purposes.

Target year of completion 2015

How will this be measured? Successful implementation

Who is responsible? Director of Finance, Director of MIS

Government Relations

Government Relations is committed to helping the agency fulfill its mission by:

- Advocating for and representing Catholic Charities' clients among elected officials and government entities
- Increasing appropriate government funding opportunities

Goal Statements

1. Increase awareness of Catholic Charities clients' needs (as well as sites/services provided) in legislator's home districts

Target Year of Completion: 2016

Who is Responsible? Director of Government Relations,
Director of Latino Affairs

How this will be measured: 40 face-to-face visits with legislators

2. Increase opportunities for Board of Advisors, Service Area Boards, Latino Advisory Committee, Regional Boards, and staff to articulate advocacy messages using the web, email and social media

Target Year of Completion: 2014, 2015, 2016

Who is Responsible? Director of Government Relations

How this will be measured: 10 alerts and posts sent to
Boards/committees and Communications Department
per quarter; 15 testimonies presented per year

3. Increase number of appropriate funding applications reviewed and/or applied for over calendar year by 10% per year.

Target Year of Completion: annual

Who is Responsible? Director of Government Grants and Advocacy

How this will be measured: 10% increase in number of applications reviewed
and/or submitted; 100% of submitted are properly
vetted prior to submission

Human Resources

1. Develop enhanced workplace violence and community safety training and ongoing de-escalation training

Target Year of Completion: 2016

Who is Responsible? Director of Staff Development and Education

How this will be measured: number of trainings completed, ongoing updates documented

2. Develop Service Area Recognition for positive work force

Target Year of Completion: 2016

Who is Responsible? Director of Staff Development And Education

How this will be measured: each service area has a developed program

3. Expand Employee Wellness Program

Target Year of Completion: 2016

Who is Responsible? Director of Human Resources

How this will be measured: Increased participation in Wellness Programs.
New Wellness initiatives

4. Enhanced Management Education

Target Year of Completion: 2016

Who is Responsible? Director of Human Resources

How this will be measured:

- Publication of training manuals
- Manager satisfaction surveys

5. Fully developed internship/service learning program attracting diverse students

Target Year of Completion: 2014 – measure baseline of diverse students
2015 – measure increase

Who is Responsible? Director of Staff Development and Education, Director of Latino Affairs, Director of Volunteer Relations

How this will be measured: Measurement by percentage
Increase of diverse students

Information Systems Group

1. Increase the use of wireless devices while monitoring for compliance of regulations.

Target Year of Completion: annual

How this will be measured: # of wireless devices in use

Who is Responsible? Chief Information Officer

2. Continue to upgrade core network and telecommunication infrastructure as needed.

Target Year of Completion: annual

How this will be measured: Capital Budget

Expenditures on technology

Who is Responsible? Chief Information Officer

3. Increase the agencies I/T disaster recovery and business continuity strategies, methods, and reliability.

Target Year of Completion: 2014

How will this be measured: number of sites with primary and secondary access methods, the number of staff that can work at a site in case of an emergency

Who is Responsible? Chief Information Officer

4. Increase the use of video and voice conferencing between sites and agencies.

Target Year of Completion: 2014

How will this be measured: presentations file sharing and real-time work collaboration on grants, contracts, and work/case files.

Who is Responsible: Chief Information Officer

5. Increase remote and mobile access to the agency's systems and application.

Target Year of Completion: 2014

How will this be measured: number of staff with primary and secondary methods, the number of staff that can work off site in case of an emergency or during the normal course of business.

Who is Responsible: Chief Information Officer

Management Information Systems

1. Most forms will be electronically submitted, routed and digitally signed and stored.

Target Year of Completion: 2018

Who is Responsible? Director of MIS

How this will be measured: # of electronic forms created

2. Newly developed applications will be ported to tablets and smartphones.

Target Year of Completion: 2018

Who is Responsible? Director of MIS

How this will be measured: # of applications in use

3. Stakeholders will plan with MIS to improve Intranet resulting in efficient and faster access to Agency information and resources.

Target Year of Completion: 2014

Who is Responsible? Director of MIS

How this will be measured: quarterly meetings
Help with VP's

4. Website solutions support the agency's mission and objectives.

Target Year of Completion: 2018

Who is Responsible? Director of MIS

How this will be measured: utilization reports

5. Improve the Centralized Client Tracking System (CTS)/electronic case record systems.

Target Year of Completion: 2018

Who is Responsible? Director of MIS, Senior Vice President
of Program Development and Evaluation,
Vice Presidents

How this will be measured: central electronic case record systems in place

Office of Latino Affairs

1) Expand Latino participation within the Board Structure

- a. Establish and Develop a Lake County Subcommittee of the Latino Advisory Committee

Target year of completion: 2014(Establish); 2015, 2016, 2017 (Develop)

How will this be measured?

- Lake County Sub-Committee in place
- Sub-Committee sets annual goals

Who is Responsible?

Director of Latino Affairs
Lake County Regional Director

- b. Integrate greater Latino participation into additional Committees of the Board (beyond the Latino Advisory Committee)

Target year of completion: 2014, 2015, 2016, 2017 (Ongoing)

How will this be measured?

- Board Committee Opportunities highlighted in each LAC Meeting Agenda
- Increased Latino participation in various Board Committees

Who is Responsible?

Director of Latino Affairs
Director of Board Relations
Junior Board Manager

2) Create and promote a broad range of engagement opportunities for Latinos

Target year of completion: 2014; 2015; 2016; 2017

How will this be measured?

- Reestablish Service Integration Committee with set meeting schedule and annual goals
- Diverse engagement opportunities established for Business; University; High School; Archdiocese/Parish; Young Latino Professionals
- Explore feasibility of Leadership/Service Program
- Ibero Program Interns will be available to expanded Services Areas
- Communication/Media plan to promote opportunities in place

Who is Responsible?

Director/Project Manager - Latino Affairs
Director of Board Relations
Director of Volunteer Relations
Director of Employee Services
Director Corporate/Foundation Relations
Junior Board Manager; Regional Directors

Project Manager – Latino Affairs

Latino Affairs/Communications

3) Work collaboratively with leadership (internal/external) to address emerging issues resulting in program opportunities

(Current areas: Healthcare; Immigration)

Target year of completion: 2014; 2015; 2016; 2017

How will this be measured?

- Emerging issues identified each year
- Initiatives established related to emerging issues
- Latino Consumer Advisory Council researched/developed (2017)

Who is Responsible?

Director of Latino Affairs
Vice Presidents

Performance Quality Improvement (PQI)

1. **All programs will tell an impactful story through the use of performance tools i.e., client surveys, outcome measures, and benchmarks, alignment with community/policy impact goals, statistical trend analyses, program evaluation, and investment to outcomes**

Target Year of Completion: 2017

Who is Responsible? Senior Vice President of Program Development and Evaluation

How this will be measured: annual program scan tool created

2. **Universities provide research information on program effectiveness**

Target Year of Completion: 2018

Who is Responsible? Vice President - Community Development and Outreach Services, Vice President – Family and Parish Support Services, Senior Vice President of Program Development and Evaluation, Vice President – Child, Youth and Family Services

How this will be measured: research reports published

3. **Staff understands the research options available in data analysis including census data, market analysis, geographical scanning, visual maps for legislators, Vicariates, and other tools.**

Target Year of Completion: 2015

Who is Responsible? Senior VP of Program Development and Evaluation
Director of Data Analysis and GIS

How this will be measured: staff survey

4. **Agency geographical and real time statistical reporting is possible due to enhanced centralized client electronic case record.**

Target Year of Completion: 2018

Who is Responsible? Director of MIS, Senior Vice President of Program Development and Evaluation, VP's

How this will be measured: presence of statistical integrated system

5. **Support Services use a viable and established PQI system.**

Target Year of Completion: 2017

Who is Responsible? Senior Administration, Director of Performance Improvement

How this will be measured: each unit reports quarterly measures

Regional Services

1. All Regional Offices provide hospitality services that create and enhance a welcoming environment.

a. Hospitality volunteers in each regional office.

Target Year of Completion: 2014

Who is Responsible? Senior Director of Regional Services, Regional Directors, Director of Volunteer Relations

How this will be measured: Job descriptions created; volunteers recruited, trained and placed in each regional office.

b. Parish referral strategy.

Target Year of Completion: 2014

Who is Responsible? Senior Director of Regional Services, Associate Vice President of Family and Parish Support

How this will be measured: Strategy developed and implemented.

c. Client service integration at a regional level.

Target Year of Completion: 2015

Who is Responsible? Senior Director of Regional Services, VPs

How this will be measured: Strategy developed and implemented.

2. All Regions effectively engage community partners in our common mission of service.

a. Enhance engagement with Regional Advisory Boards (RAB).

Target Year of Completion: on-going

Who is Responsible? Senior Director of Regional Services, Regional Directors

How this will be measured: Increase RAB diversity in one identified category per region, per year.
Increase RAB participation in mission related activities by 10%, per region, per year.

Regional Services

- b. Enhance parish relationships.** *Target Year of Completion:* on-going *Who is Responsible?* Senior Director of Regional Services, Regional Directors
- How this will be measured:* Regional Parish Outreach Committee (POC) meetings held no less than semi-annual basis.
 Continue to increase Regional POC membership and increase engagement opportunities (including parish youth) by 10%, per region, per year
- c. Enhance external partnerships.** *Target Year of Completion:* on-going *Who is Responsible?* Senior Director of Regional Services, Regional Directors, Director of Communications
- How this will be measured:* Create comprehensive regional statistics and marketing materials to tell the story on a regional level.
 Increase business partnerships by 10% per region, per year.
 Increase regional event sponsorships by 10%. *Who is Responsible?* Senior Director of Regional Services, Regional Directors, Director of Regional and Program Special Events