

CATHOLIC
CHARITIES

CHERISHING THE DIVINE WITHIN ALL

Greater Promise

OUR STRATEGIC PLAN
TO GUIDE FY 2021-2023





Greater Promise

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Catholic Charities of the Archdiocese of Baltimore is the largest and one of the most effective private human service agencies in Maryland, meeting the needs of thousands of our neighbors every day across a multitude of services in Baltimore City and across the nine counties that comprise the Archdiocese of Baltimore. Inspired by the Gospel mandates to love, serve, and teach, our mission—providing care and services to improve the lives of Marylanders in need—is only made possible through the dedication and talent of our colleagues, volunteers, donors, and community partners. Coming together, we are able to make tangible differences in the lives of our neighbors, while we simultaneously work for justice by addressing systemic and structural issues and barriers.

Most importantly, we open our services and our hearts with love to every person we encounter, recognizing and cherishing the Divine within all. St. Oscar Romero said, “Peace is a product of justice. But justice is not enough. Love is necessary—the love that makes us feel that we are brothers and sisters is properly what makes for true peace.”

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Catholic Charities shares and spreads love by accompanying people where they are along their journey. Our services are not solely provided in brick and mortar establishments; we are interrupting violence before it happens on street corners, creating therapeutic spaces in our clients' homes, engaging with lawmakers outside of committee rooms and bringing them into our lunchrooms. We ensure our actions, language, and interventions are nonjudgmental and person-first, knowing that everyone is defined by more than a single experience, decision, or event that transpired in their lives.

We not only create spaces for those we work with, but also for each other within our agency. As an agency, we are striving to put our colleagues first, supporting and uplifting each other through the colleague-led Diversity, Equity and Inclusion (DEI) Council, the Trauma-Informed Care Committee, and our internal website, the Vine.

In early 2020, our community was again shaken, facing an unprecedented public health crisis and dramatic financial and economic challenges. Added to these was a challenge in faith, as the impact and realities of abuse of power, structural and institutional inequity, and racism became even more visibly present.



Words may be weak, but silence is not justice. We commit not just to speak, but to act in, with, and for love, and to cherish the Divine within every person. We recommit to addressing structural and institutional racism and inequity as we strive towards our vision where each person has the opportunity to achieve their God-given potential.

We are all worthy of love and we all need support, for no one is truly self-sufficient in our world. We need each other as our paths and our work are bound together. This has never been more evident than during our current crises. As a community, we are only as healthy as our neighbor, and the only way to overcome a worldwide crisis is to band together and meet each other's needs by jointly contributing our services and skills to our community. We have had to be nimble and creative in our service delivery model as we strive to reach our neighbors through an accepting mindset to serve "anyone, anywhere, with any needs." Our work might look different during these crises, but our mission remains the same.

As we embark on the next edition of our agency's strategic plan, we are defining our vision for the next 100 years, while reinforcing our previous plan's drivers. We're building upon the best practices in our service delivery system, and simultaneously evaluating the landscape for needed changes and challenges.

THE STRATEGIC PLANNING PROCESS

Participants

Beginning in January 2019, leaders of all levels across the agency have supported the strategic planning process from ideation.

BOARD OF TRUSTEES

Throughout the planning process, the Board of Trustees has been involved. All trustees have been updated at least quarterly, and were invited to participate in a pulse survey about the agency's strategic priorities. Five trustees represented the full board as members of the Strategic Planning Advisory Committee.

LEADERSHIP AND PLANNING

Approximately 20 leaders make up the agency's Leadership and Planning Committee, whose chartered purpose is to participate in the development of, and be responsible for, the ongoing evaluation of strategic action items for the agency. Members of Leadership and Planning were active participants in breakout teams, and are responsible for implementation and continued measurement of success of the plan.

STRATEGIC PLANNING ADVISORY COMMITTEE

Governing the planning process was a core team of individuals made up of agency senior leadership and trustees. This diverse group of leaders shares a vast array of experiences and expertise across a wide range of industries. Compiling the feedback from agency colleagues and considering the priorities of industry experts and agency funders, this group guided the planning process.

- Paul J. Bowie, President, Board of Trustees
- Theresa Becks, Vice President, Board of Trustees
- Matthew Gallagher, Executive Committee Member, Board of Trustees
- Daniel Rizzo, Development Committee Chair, Board of Trustees
- Tamla Olivier, HR Committee Chair, Board of Trustees
- William J. McCarthy, Jr., Executive Director
- Mary Anne O'Donnell, Assistant Director and Chief Administration Officer
- Scott Becker, Chief Financial Officer
- Erin Bolles, Chief Development Officer
- Amy Collier, Division Director, Community Services
- Kevin Keegan, Division Director, Family Services
- Aileen Tinney, Division Director, Senior Services
- Karen Haughey, Administrator, Behavioral Health Services
- Cailin Stine, Associate, internal design lead
- Greg Conderacci, Consultant, external design lead

THE STRATEGIC PLANNING PROCESS

AGENCY-WIDE ADVISORY COUNCIL

Over 70 leaders from across the agency have been identified by senior leadership to come together at least quarterly to share learnings from, and back to, their teams. These individuals participated in many of the design sessions, and were active participants of breakout teams as the cross-functional subject matter experts.

WRITING CONTRIBUTORS

As the planning process wrapped up and transitioned into the writing phase, our society found itself in the midst of the COVID-19 pandemic. Catholic Charities was intentional about cross-training colleagues and leveraging colleagues' existing skillsets to support new needs across the agency. In that spirit, Sarah McIlvried and Lisa Klingemaier both contributed to the plan.

BREAKOUT TEAMS

Following the discovery phase of the planning process, three breakout teams formed to own the design phase. Each team was made up of approximately 15 individuals, who represent agency-wide cross-functional expertise at varying levels of leadership. Team participants were drafted by the Leadership and Planning Committee.

The breakout teams were led by an executive sponsor and functional lead chosen by the Management Team.

- *Driver 1: Aileen Tinney and Rex Foster*
- *Driver 2: Karen Haughey and Diane Polk*
- *Driver 3: Erin Bolles and Julie Martin*



THE STRATEGIC PLANNING PROCESS

Discovery Sessions

The 2021-2023 Strategic Plan took shape through a series of discovery sessions. These sessions were designed to help identify where we can more fully live out our mission, what barriers hold us back, and how we can continue to leverage innovative solutions to move us forward. The sessions facilitated a plan for a Catholic Charities that can change and adapt as we meet the future with fewer walls between the agency and the neighbors we serve.

REIMAGINING CATHOLIC CHARITIES – JANUARY 2019

The creative process began with asking the right questions. In January 2019, the Leadership and Planning Committee gathered to begin reimagining Catholic Charities. They asked: As an agency, what were our assumptions, habits, and aspirations? How could our path forward be enlightened by naming these? How might they show us where to redirect or re-evaluate, and where to surge forward toward a fuller realization of our mission and values? Five themes emerged from this questioning that would guide the planning process:

- | | |
|--------------------------|--------------|
| 1) Clients | 4) Resources |
| 2) Colleagues | 5) Structure |
| 3) Core beliefs/identity | |

CHARRETTE – JUNE 2019

The next stage of the process brought together the entire Agency-wide Advisory Council. At an offsite gathering at the Church of the Nativity, where new, radical, and creative ideas could flow, the charrette process sought collaborative ideas under each of the five themes. Moving from questions toward possible solutions, this process generated a comprehensive view of potential issues and possibilities.

COMMITMENTS – SEPTEMBER 2019

In September 2019, the Leadership and Planning Committee identified the four guiding commitments that would ultimately ground the agency through Strategic Planning and decision-making:

- We are committed to gaining an understanding of the root causes of the issues facing those we serve in order to create transformational change.*
- We are committed to understanding and responding to community strengths/needs and providing services in a collaborative, person-centered approach in multiple, flexible locations.*
- We are committed to growing revenue and improving efficiency.*
- We are committed to improving our culture of care, which enables all our partners to love, to serve, and to teach.*

THE STRATEGIC PLANNING PROCESS

Design – Fall 2019-Spring 2020

Guided by the initial research and learnings from these earlier phases, the three breakout teams were formed to drive the research, benchmarking, development, and refinement of the Strategic Plan. These core teams applied learnings from the discovery phase to formulate the plan's actionable and measurable goals and tactics.

The previously described pulse survey was shared with the Agency-wide Advisory Council and the Board of Trustees. Participants were asked to identify how strongly they agreed with 10 statements based on the planning process grounding commitments. Armed with the all of learnings from the discovery phase and the results of the pulse survey, the breakout teams frequently met to design the Strategic Plan. The Leadership and Planning and Strategic Planning Advisory Committees provided feedback throughout the design phase.

Refinement – Summer 2020

When the COVID-19 pandemic arrived in March 2020, the team was starting to finalize the FY21-23 plan. In a testament to the agility of the agency, Catholic Charities swiftly pivoted services to continue meeting the needs of our neighbors, while maintaining a safe environment for both clients and colleagues. The pandemic reminded the agency of the critical nature of its services, and the Board of Trustees recommended and approved an additional four months for the planning process. In the summer of 2020, the breakout teams, the Leadership and Planning Committee, and the Strategic Planning Advisory Committee spent time reflecting on and incorporating learnings from the pandemic in to the Strategic Plan.

Approval – Summer 2020

The Strategic Planning Advisory Committee presented the FY21-23 Strategic Plan to the Board of Trustees on Sept. 17, 2020, at which time the board voted to approve the plan.

THE STRATEGIC PLANNING PROCESS

Implementation and Reporting – ongoing throughout plan years

The Management Team, in partnership with the Leadership and Planning Committee, designated owners who are responsible for enabling the strategic goals' success. Owners developed metrics to track the success of their work. The Leadership and Planning Committee will review these metrics monthly to track progress. The Leadership and Planning Committee continually reviews and challenges the tactics in support of the goals to ensure they remain relevant and realistic. Additionally, the Board of Trustees will receive a deeper view of one strategic goal at each of their quarterly meetings throughout the plan years. As the world has seen the value in pivoting through the COVID-19 pandemic, the agency will also pivot as necessary.

Strategic Drivers

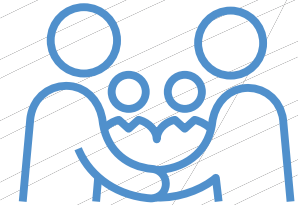
During the planning process in 2019, the Strategic Planning Advisory Committee agreed to build upon the Strategic Drivers from the FY18-20 Strategic Plan. The committee felt these drivers continue to be highly relevant for the coming years.

The breakout teams developed goals for each of the Strategic Drivers, guided by the commitments created in the design phase. As Catholic Charities of the Archdiocese of Baltimore nears its centennial year in 2023, these goals are designed to propel the agency forward into its next 100 years.



THE STRATEGIC DRIVERS

Strategic Driver #1



Expand and enhance our services to assist more people to achieve their God-given potential.

A) Expand and enhance delivery of person-centered services to assist people in becoming more independent and self-sufficient.

- *Improve internal access for a streamlined, positive client experience with lasting impact.*
- *Accompany others on their journey through our services with greater knowledge of internal and external resources.*
 - *Ensure that 100 percent of colleagues gain access to client surveys and results from across the agency.*
 - *Ensure that 100 percent of “journey-walker” colleagues across the agency are connected and share expertise and resources to best serve clients.*
- *Develop and leverage technology solution, integrating client record systems and enabling data-informed decision-making*

Outcomes:

- *Improve performance by 20 percent year-over-year on surveys of client experience; measure overall satisfaction with our services in their journey and their personal life journey along at least three additional points in client’s journey, beyond placement.*
- *Increase use of person-centered, relationship-based virtual offerings (e.g. apps, webinars, telehealth) across the agency by 50 percent by leveraging more agile service delivery models.*

B) Create economic opportunities that align with a person’s skills, interests, passion, and ability to earn a living wage.

- *Create coordinated and centralized workforce development outreach and programming across the agency that recognizes significant barriers for individuals (i.e. behavioral health needs, transportation, child care).*
- *Evaluate opportunities to create, or collaborate towards, skill training programs that address market needs and/or internal labor needs and lead to a living wage and career pathway.*
- *Identify and pursue avenues to improved economic stability via high-performing microenterprise nonprofit incubators across the region.*

THE STRATEGIC DRIVERS

Outcomes:

- *Leverage internal resources to address barriers and connect 450 individuals to living-wage level employment incrementally each year.*
- *Identify, access, or create 10 technical training programs, including nursing assistants, environmental services, and direct support professionals.*
- *Ensure that 50 percent of clients placed in jobs remain continually employed in some manner for 12 months or more.*

C) Develop partnerships in order to create and maintain safe, healthy and affordable housing.

- *Leverage expertise across the agency in different areas of housing; increase resource and knowledge sharing; improve client experience and potential to access and maintain permanent housing.*
- *Identify collaborative partners and internal resources to best manage the preservation of existing affordable housing stock across the agency and maximize opportunities for growth.*
- *Research successful housing models for persons experiencing homelessness and other vulnerable populations, and determine their possibilities in Maryland.*

Outcomes:

- *Place 600 additional individuals in permanent housing.*
 - *Ensure that 80 percent of those placed retain housing for 12 months or more.*
 - *Improve formerly-homeless-to-housed rate by 25 percent, with those individuals maintaining housing for 12 months or more.*
- *Bring a new or innovative housing model to Maryland as an agency initiative or in partnership with others.*

D) Create strategic partnerships based on emerging trends, gaps, needs, assets, and interests of those we serve and their communities.

- *Align with existing external interests to create healthier communities by impacting the social determinants of health.*
- *Plan listening sessions with clients, colleagues, and community members to assess needs, trends, opportunities and assets.*

THE STRATEGIC DRIVERS

- *In partnership with community leaders and colleagues, identify appropriate resources, solutions and innovative services and programs.*
 - *Prioritize new programming ideas surfaced during the Accelerate Baltimore sessions or other convenings.*

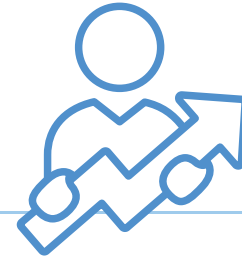
Outcomes:

- *Ensure at least 200 colleagues are connected to community-based workgroups or committees.*
- *Meet the most pressing needs as defined by individuals and community partners:*
 - *Year 2: foster the generation of new resources to improve lives within three communities*
 - *Year 3: operationalize three opportunities for partnered action to improve lives*

THE STRATEGIC DRIVERS

Strategic Driver #2

Become a model high-performing organization in service to our mission.



A) Develop diverse, strategic, results-oriented, leaders at every level of the agency who act with urgency.

- *Create clear expectations and milestones for developing leaders to master our leadership competencies and achieve operational goals.*
- *Review proficiency in leadership competencies and progress towards operational goals as part of regular check-ins.*
- *Ensure diverse representation and inclusivity during leadership development programming.*

Outcomes:

- *Improve employee engagement scores in three documented improvement areas (Encouraging New Ideas, Belief in Direction, Improving Efficiency) by two points on seven-point scale.*
- *Ensure that leaders consistently achieve three stretch operational goals.*
Improve retention by way of individual leaders' documented and measured retention strategy.

B) Deliver leadership training and succession planning that develop highly effective future leaders.

- *Develop an effective way to measure leaders against agency leadership competencies.*
- *Integrate the principles of Catholic social teaching into multiple modes of training.*
- *Examining multiple aspects of diversity, determine gaps in hiring and succession plans, and create actions to address gaps.*

Outcomes:

- *Increase identified successors' internal promotions and participation on internal and external committees.*
- *Ensure that all leaders are well-versed in Catholic social teaching principles, especially as they relate to the agency's vision, mission, values, and commitments.*
- *Fill gaps in succession plans with talent development group participants.*
- *Increase representative diversity in agency leadership roles.*

THE STRATEGIC DRIVERS

C) Increase and diversify agency revenue sources.

- *Shift focus of Communications and Development efforts to cause-based marketing.*
- *Internally map services that can be “purchased” within the agency.*
- *Turn non-revenue-generating positions into revenue generating positions.*

Outcomes:

- *Acquire 10 percent year-over-year net new donors (1,000, 2,100, and 3,300 net new donors respectively).*
- *Convert three externally purchased service areas to internal provision (e.g. VMCR providing therapy to seniors in our communities).*
- *Convert five agency-funded roles into revenue-generating roles (estimate additional \$500k in revenue)*

D) Leverage scale and operational efficiencies across the agency and eliminate redundant efforts.

- *Align organizational structure to increase collaboration and access, and to leverage operational efficiencies.*
- *Identify opportunities to leverage purchasing power for agency-wide products and services (e.g. maintenance and security).*

Outcomes:

- *Save costs in infrastructure and capacity-building as a result of realignment and efficiencies.*
- *Save 5 percent for consolidated purchased products and services across agency, net.*

E) Develop and implement standardized metrics that measure the impact of our services.

- *Using an improved and standardized evaluation tool for existing and new programs, create an outcome review structure that ensures quality services and positive impact.*

Outcomes:

- *Improve agency accreditation scores for effectiveness and relevance.*
- *Measure achieved outcomes against internal targets and industry standards.*

THE STRATEGIC DRIVERS

Strategic Driver #3

Provide an experience for our colleagues, volunteers, donors and community partners that promotes a sense of discipleship and enhances leadership.



A) Create an employee experience that gives colleagues the opportunity to develop personally and professionally by recognizing their needs, passions, interests, and potential.

- *Expand and broaden training opportunities and experiences at all levels within the agency.*
- *Ensure all colleagues receive a baseline understanding of the six principles of trauma-informed care.*
- *Ensure all supervisors are trained on trauma-informed supervision.*
- *In line with becoming a trauma-informed care agency, offer health and wellness opportunities for all colleagues.*
- *Expand and promote AWARE for colleagues.*

Outcomes:

- *Reduce colleague turnover regarding “opportunity for advancement” (as indicated in the agency exit survey) by 10 percent.*
- *Increase colleague engagement in trauma-informed care initiatives.*
- *Increase representative diversity in agency leadership roles.*
- *Enable more equitable career path development and mobility by increasing development opportunities for entry-level positions by 50 percent (i.e. sitting on a committee, stretch project assignments, intentional training plans, etc.).*

B) Create an environment of shared responsibility for consistent and routine communication and education that fosters a culture of hospitality.

- *Standardize internal and external communication so that each partner receives the same standard of excellence in customer/client service, information sharing, and engagement opportunities.*
- *Develop standardized round-robin trainings and information sessions across the agency to fully equip our colleagues with knowledge and ownership.*

THE STRATEGIC DRIVERS

- *Align tactics and strategy of internal partners to create a cohesive and streamlined experience for all, regardless of entry point.*
- *Implement a biannual colleague-connecting initiative to learn and develop agency-wide relationships across program and service areas.*

Outcomes:

- *Decrease turnaround times for resolution of inquiries by internal and external partners to 48-72 hours.*
- *Improve trends in external partners' (clients; donors; volunteers; parishes) satisfaction survey results regarding information turnaround, accuracy, and customer service/experience.*
- *Increase emphasis on stewardship activities; have at least one event or engagement per year to show gratitude for volunteers and donors at every level.*
- *Increase colleague participation in internal events/initiatives, particularly new (under one year) and direct care colleagues.*
- *Increase external partner participation in community-oriented events/initiatives.*

C) Provide consistent and clear education about issues that impact people who are vulnerable throughout Maryland.

- *Build Ambassador Teams for volunteers, donors, and parishioners to proactively strengthen community presence and education.*
- *Invest in a stronger virtual experience for internal and external stakeholders. (e.g. virtual tour of programs, live chat features on website for clients, online wish lists for donors and volunteers).*

Outcomes:

- *Engage 600 individuals in virtual tours and education programs and convert 25 percent of participants into new donors and volunteers.*
- *Ambassador Teams will engage in three community events per quarter (e.g. university community service fairs).*
- *Engage 80 percent of all donors each year with at least one form of personalized communication.*

THE STRATEGIC DRIVERS

- *Redeploy 50 percent of current volunteers whose engagement activities are no longer possible to new areas/causes.*
- *Engage 30 percent of existing donor base each year in virtual forms of agency participation (e.g. peer-to-peer fundraising, online wish lists, special events and virtual tours).*

D) Serve as a resource to parishes and schools on issues of peace and justice

- *Create opportunities to be an active participant in parish and school faith formation activities.*
- *Offer training on the principles of Catholic social teaching to parishes and schools to strengthen the connection between scripture, tradition, and community action and volunteerism.*
- *Provide in-person and virtual AWARE opportunities and experiences to educate and galvanize involvement in our mission.*
- *Recruit volunteers to join our mission, expanding our definition of a volunteer.*
- *Develop school partnership strategy to readily coordinate educational and volunteer opportunities and provide exposure for multiple causes*

Outcomes:

- *Engage 50 percent of targeted parishes in our tiered program, including parishes with schools.*
- *Provide AWARE experiences to 50 percent of targeted parishes and schools in our tiered program.*
- *Convert 7 percent of AWARE participants into volunteers or advocates.*
- *Increase coordinated school partnerships by 50 percent (from baseline data gathered from current volunteer managers).*

Our Vision

Cherishing the Divine within,
we are committed to a Maryland
where each person has the
opportunity to reach his or her
God-given potential.





CATHOLIC
CHARITIES

CHERISHING THE DIVINE WITHIN ALL

*Inspired by the Gospel mandates to love, serve and teach,
Catholic Charities provides care and services
to improve the lives of Marylanders in need.*