

CATHOLIC
CHARITIES

CHERISHING THE DIVINE WITHIN ALL




FY 2018-2020

strategic plan



Presented by the Strategic Planning Committee and approved by the Board of Trustees on May 25, 2017.



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



our strategic plan



THIS STRATEGIC PLAN IS THE PRODUCT OF OUR TRIENNIAL AGENCY-WIDE STRATEGIC PLANNING PROCESS.

The process included significant input from our program divisions and support service divisions, an assessment of other organizations, investigation of key areas of work and multiple planning retreats and meetings, described below. The process followed an Appreciative Inquiry approach that consisted of five phases of work:

DISCOVERY,
dream,
DESIGN, decide
& **DO!**

table of contents

Strategic Plan FY 2018-2020

- Introduction
- Our Mission, Vision, Values & Commitments
- Participants in the Strategic Planning Process
- Timeline and Process for the Creation of the Strategic Plan
- Description of Approved Initiatives
- Strategic Drivers and Goals
- Action Steps Necessary to Achieve Our Goals



introduction



AS THE HUMAN SERVICE ARM of the Catholic Church in The Archdiocese of Baltimore, Catholic Charities is committed to cherishing the Divine within every person. St. Francis is often quoted as saying “Preach the Gospel, and if necessary, use words.” At Catholic Charities, we preach the Gospel of Jesus Christ daily through thousands of encounters among colleagues, volunteers, guests and clients. Our ministries of loving service and justice afford us the opportunity to share the “good news” of Christ’s love every day. It is through these acts of service and love that we promote discipleship so that those we encounter may go forth, share the good news and restore hope where hope had been lost.

TRUE TO OUR MISSION, we are inspired by the Gospel mandates to love, serve and teach in providing care and services in order to improve the lives of Marylanders in need and to make our community better. Our programs and services continue to evolve as we focus on meeting the changing needs of individuals, families and our community.

IN ORDER TO MEET THESE EVER-CHANGING NEEDS, over the next three years our efforts will focus on strengthening our internal systems and processes and improving

services in support of the people and communities we serve. The continual quality improvement of our systems and operations will provide the structure and foundation for us to strengthen the programs and services that assist individuals, families and communities.

CATHOLIC CHARITIES STARTED AS A CHARITY BASED SERVICE MODEL, providing works of mercy to meet people’s immediate basic needs such as food and shelter. We continue to provide these much needed services and have built on those services by assisting with more enduring solutions such as permanent housing, employment and behavioral health.

AS WE LOOK TO THE FUTURE, we are committed to continuing these effective services along with even greater efforts in building stronger partnerships with parishes, strengthening neighborhoods and communities and working for justice. We recognize that in order to bring about lasting change, we must face the systems that contribute to poverty and injustice with the power of truth, love and community.

Continued on the next page.



introduction continued

GUIDED BY THE FUNDAMENTAL BELIEF THAT EVERY PERSON HAS INHERENT DIGNITY, we are committed to working with community partners and leaders to support family stability and neighborhood transformation. Given the multiple challenges faced by individuals, families and communities, we take a holistic approach to stability by committing to goals that include:

- Invest in existing community assets
- Attend to diversity and inclusion in all that we do
- Develop solutions that address prolonged unemployment
- Strengthen multifaceted care to address substance use and abuse
- Improve behavioral health services

WE ARE COMMITTED TO BUILDING a strong organizational foundation of efficiency and effectiveness by pursuing goals that include:

- Cost savings through improved purchasing practices
- Increased efficiency through enhanced financial systems

- Evaluation of the impact of our services and systems
- Improve delivery of services
- Developing the talent of our colleagues

AS WE STRENGTHEN the systems and processes that support our programs and continue to keep an eye toward how we can adapt to best meet the changing needs of Marylanders, we know that our efforts bring hope and light to individuals, families and communities.

OUR MUTUAL STRENGTH as an organization and community increases with each family that achieves stability, each individual who is healed and able to return home and regain independence and with each community that awakens to the spark of hope present in their own strengths.

AT CATHOLIC CHARITIES, WE CHERISH THE DIVINE WITHIN ALL. This is where hope lives and why we are excited about our direction over the coming three years.

our mission, vision, values and commitments



DURING OUR STRATEGIC PLANNING PROCESS, Catholic Charities reaffirmed our existing mission, vision and values. Our Mission, Vision, Values and Commitments are foundational and define what we do, what we aspire to achieve, why we do this work and how we approach our work.

Our Mission

What we do

Inspired by the Gospel mandates to **LOVE, SERVE and TEACH**, Catholic Charities provides care and services to **IMPROVE THE LIVES** of Marylanders in need.

Our Vision

What we are working toward

Cherishing the Divine Within all, **WE ARE COMMITTED** to a Maryland where **EACH PERSON** has the opportunity to reach his or her **GOD-GIVEN POTENTIAL**.

Our Values

Why we do what we do

TO LOVE, TO SERVE, TO TEACH
and **TO WORK FOR JUSTICE**.

Our Commitments

How we do our work

- **We will honor and respect the DIGNITY of every person.**
We believe that all people are created in the image of God and so have an inherent dignity, regardless of the circumstances of their lives. As such, we commit to honoring and respecting this dignity in every interaction.
- **We will encounter each person with COMPASSION.**
We meet others with a sincere desire to know and understand them, without judgment and with a genuine concern that is expressed in the care we provide.
- **We will act with HUMILITY.**
Humility is an openness that actively seeks out others' points of view and that both offers and accepts forgiveness when we have not been faithful to our commitments.
- **We will reach out to others in a spirit of COLLABORATION.**
Collaboration is working together, drawing upon each person's unique skills, knowledge and experience, to achieve a common purpose.
- **We will serve with EXCELLENCE.**
We are inspired to be our best and to do our best work with and for others.
- **We will act with INTEGRITY in all we do.**
When we act with integrity, we do what we say we will do.



participants in the strategic planning process

MEMBERS OF CATHOLIC CHARITIES' BOARD OF TRUSTEES

Throughout the planning process, several members of an ad hoc committee of the Board of Trustees were invited to various meetings and presentations in order to provide insight and feedback.

MANAGEMENT COMMITTEE

The Management Committee served as the primary decision making body in the strategic planning process. It is made up of the following members:

- William McCarthy, *Executive Director*
- Mary Anne O'Donnell, *Assistant Director & Chief Administrative Officer*
- Scott Becker, *Chief Financial Officer*
- Amy Collier, *Director, Community Services Division*
- Arnold Eppel, *Director, Senior Services Division*
- Kevin Keegan, *Director, Family Services Division*
- Christopher Vaughan, *Director of Development*

LEADERSHIP AND PLANNING COMMITTEE

The Leadership and Planning Committee is made up of about 20 senior leaders from across the Agency, and they oversee the implementation and tracking of the Strategic Plan. The members of this group were deeply involved in crafting the strategic plan.

GROUP OF 70

The Group of 70 was established in late 2016 in order to help lead and provide guidance on agency-wide efforts, to facilitate transparent communications throughout the Agency and to help inform and implement the Strategic Plan. This group was involved throughout the Strategic Planning process and many of the members participated in strategic planning working groups.

EXTERNAL CONSULTANTS

- Matt Minahan, *Ed.D., Principal, Minahan and Associates*
- Kristyn Berger, *Consultant, Minahan and Associates*



timeline and process for the creation of the strategic plan

November 2016:

“Initiation and Discovery”

IN NOVEMBER 2016, the Catholic Charities Management Committee, Leadership and Planning Committee and an ad-hoc committee of the Board initiated the strategic planning process during a two day retreat facilitated by an external consultant. During this retreat, the committees reaffirmed the Agency’s mission, vision and values; identified seven high priority strategic issues and areas of work to investigate and benchmark; and designated working groups to do the benchmarking work in these seven areas.

THE SEVEN HIGH PRIORITY strategic issues and areas of work included:

1. Community Engagement
2. Community Workforce Development
3. Agency-wide Substance Use Approach
4. Diversity and Inclusion
5. Talent Retention and Development
6. Program Performance Management
7. Improve Agency Efficiency

November 2016–January 2017:

“Dream” Benchmarking Teams

OVER SIX WEEKS, seven working groups made up of individuals from across the agency gathered benchmarking information from various organizations in order to learn how Catholic Charities could improve and measure our work in the coming years.

IN JANUARY 2017, at the end of the benchmarking process, each team presented their findings and recommendations to the Leadership and Planning Committee and an ad hoc committee of the Board. Following these presentations, the Management Committee held an all-day retreat to determine which of the projects to sponsor. All seven projects were approved with some minor modifications and the Efficiency project was split into two more specific projects – Procurement and Financial Systems.

Continued on the next page.



timeline continued

AFTER MANAGEMENT COMMITTEE APPROVAL AND FEEDBACK, the revised list of projects included:

1. Community Engagement
2. Community Workforce Development
3. Agency-wide Substance Use Approach
4. Diversity and Inclusion
5. Talent Retention and Development
6. Program Performance Management
7. Financial Systems
8. Centralized Procurement

January 2017–February 2017:

“Design”

AFTER THE EIGHT PROJECTS HAD BEEN APPROVED by the Management Committee, a design team was assembled for each. The design teams were charged with developing project designs for the implementation of the identified work, including timeline and cost estimates.

March 2017:

“Decide”

AT THE BEGINNING OF MARCH 2017, the design teams each presented their recommendations to the Leadership and Planning Committee. Following these presentations, the Management Committee held an all-day retreat to determine which of the initiatives to sponsor and to work out details related to budgeting. All eight initiatives were approved with some minor modifications and budget adjustments.

description of approved initiatives



1. **COMMUNITY ENGAGEMENT:** The Agency has traditionally operated primarily on a service delivery model and the aim of this work will be to begin to shift toward more of a relational, partnership-based model in communities. Placing emphasis on the assets within a community rather than the deficits and needs for services, we will partner closely with Catholic parishes and parishioners to strengthen communities.
2. **COMMUNITY WORKFORCE DEVELOPMENT:** The aim of this work is to support the people we serve through coordinated efforts and a continuum of integrated services including skills training, employment and financial stability. In general, we will look at trends in employment/underemployment/unemployment and determine how the Agency can contribute to positive change across employment sectors.
3. **AGENCY-WIDE SUBSTANCE USE APPROACH:** This effort will integrate the substance-use work we are doing across divisions and improve our ability to meet client needs. This will include improved medical data sharing between programs and obtaining Medicare and other licensure to enable the Agency to provide additional needed services.
4. **DIVERSITY AND INCLUSION:** The aim of this area of work is to identify where the Agency can operate with more attention to diversity and inclusion in our work – both internally and externally – and weave this into our culture and the way we do things.
5. **TALENT RETENTION AND DEVELOPMENT:** This project will focus on strengthening the support we offer current employees in their development and strategically developing our future leaders. A key outcome is improvement of employee retention in strategic areas.
6. **PROGRAM PERFORMANCE MANAGEMENT:** This area of work focuses on the use of data and evidence to drive performance and achieve outcomes. We will continue to strengthen the systems, processes, and culture that lead to high performance, with a particular emphasis on how we capture, manage and use data.
7. **FINANCIAL SYSTEMS:** There are several areas within our financial operations that can benefit from updated processes and systems, which this effort will address. This will include automated invoice workflow, integrated electronic health records and billing systems and improved financial reporting systems, including business intelligence functionality.
8. **CENTRALIZED PROCUREMENT:** This effort will include looking for opportunities for consolidated spend, elimination or outsourcing while determining what processes in programs or departments are inefficient (process improvement opportunities).



strategic drivers and goals

DURING THE PLANNING PROCESS IN 2014, the Strategic Planning committee agreed on three strategic drivers to guide and propel the Agency forward in the advancement of our vision and realization of our mission as part of the FY 2015 – FY 2017 Strategic Plan.

ON NOVEMBER 8, 2016 AT A STRATEGIC PLANNING RETREAT, the Agency Management Committee recommitted to these three drivers for the FY 2018 – FY 2020 Strategic Plan because they continue to be highly relevant and still offer substantive guidance for our work in the coming three years.

THE GOALS UNDER EACH OF THE DRIVERS have been refined and expanded for the FY 2018 – FY 2020 Strategic Plan in order to reflect the most recent planning process.

STRATEGIC **1** DRIVER

EXPAND AND ENHANCE OUR SERVICES TO ASSIST MORE PEOPLE IN NEED TO ACHIEVE THEIR GOD-GIVEN POTENTIAL.

- **Goal 1A:** Engage with communities to promote and sustain the independence of those we serve.
- **Goal 1B:** Leverage changes in the health care system to enable the people we serve to achieve better health outcomes.
- **Goal 1C:** Expand our Behavioral Health work to include the design and implementation an Agency-wide substance use disorder treatment plan to strengthen our ability to meet the health needs of those we serve.
- **Goal 1D:** Design and implement an Agency-wide community workforce development plan to strengthen our ability to meet the employment and financial stability needs of those we serve.

STRATEGIC **2** DRIVER

BECOME A MODEL HIGH-PERFORMING ORGANIZATION IN SERVICE TO OUR MISSION.

- **Goal 2A:** Align centralized administrative functions to support our service divisions and to optimize efficiency and responsiveness.
- **Goal 2B:** Diversify and maximize revenue sources to achieve sustainability.
- **Goal 2C:** Review and improve all procurement processes to gain efficiencies and realize cost savings across the agency.
- **Goal 2D:** Modernize and enhance financial systems and processes to improve efficiency and end user experiences.
- **Goal 2E:** Implement performance management systems and processes that support a culture of high performance and support us in achieving positive outcomes with the people we serve.

Continued on the next page.

strategic drivers and goals continued



STRATEGIC **3** DRIVER

PROVIDE AN EXPERIENCE FOR OUR COLLEAGUES, VOLUNTEERS, DONORS AND PARTNERS THAT PROMOTES A SENSE OF DISCIPLESHIP AND ENHANCES LEADERSHIP.

- **Goal 3A:** Expand opportunities for deepening the level of engagement and facilitate the growth of our stakeholders.
- **Goal 3B:** Become an agency that prioritizes diversity and inclusion.
- **Goal 3C:** Develop and retain more effective leaders and talent across the Agency to position us to achieve Agency performance objectives and provide the best service possible to the people we serve.



action steps necessary to achieve our goals

THERE ARE MANY INDIVIDUAL TASKS WE MUST ACCOMPLISH in order to achieve the five goals listed above. We have identified some of these action steps already and the list will be expanded throughout the coming years as we continue to learn, evaluate and plan. Some of the action steps we know must be accomplished are outlined below.

STRATEGIC DRIVER I

EXPAND AND ENHANCE OUR SERVICES TO ASSIST MORE PEOPLE IN NEED TO ACHIEVE THEIR GOD-GIVEN POTENTIAL.

GOAL IA:

Engage with communities to promote and sustain independence of those we serve.

- Provide leadership, engagement and expertise in the Archdiocesan Parish Planning Process to insure that community-based services are maintained, created or expanded in order to meet the needs of the parish and broader communities identified through the process.
- Expand our programming in early childhood development, family empowerment and family economic stabilization through the expansion of our Head Start Programs and the “Two Generational Approach.”
- Partner with leaders in two communities to facilitate a community asset assessment and mapping project. This work will leverage our current network, including parishes, individuals and existing services.
- In partnership with communities, utilize asset assessment to identify opportunities and solutions that build on the strengths of individuals, families and communities. Clarify Catholic Charities’ role in these efforts and how we can serve as a bridge between communities and external resources.

action steps...

STRATEGIC DRIVER **I** continued

EXPAND AND ENHANCE OUR SERVICES TO ASSIST MORE PEOPLE IN NEED TO ACHIEVE THEIR GOD-GIVEN POTENTIAL.

GOAL IB:

Leverage changes in the health care system to enable the people we serve to achieve better health outcomes.

- Develop the capability to care for and treat individuals who struggle with both mental illness and substance abuse, and extend the Behavioral Health Services available within the Family Services Division to the other program divisions. Incorporate Psychiatric Rehabilitation and psychiatry services into Community Services Division programs.
- Apply for Medicare license to allow further VMCR access into other Catholic Charities service areas.
- Continue to strengthen a strong relationship with St. Agnes and the Jenkins Community.

GOAL IC:

Expand our Behavioral Health work to include the design and implementation of an Agency-wide substance use disorder treatment plan to strengthen our ability to meet the health needs of those we serve.

- Acquire a substance abuse provider in Baltimore City.
- Obtain a license to provide ASAM Level 2.1 and 2.3 services.
- Educate CC leadership in Comprehensive Coordinated and Integrated System of Care (CCISC).
- Implement program, including: Finalize program structure; Create program climate that honors treatment complexity; Assess all clients using ASAM assessment; Provide dual disorder treatment at all clinics; Provide discharge resources to clients; Enhance licensure of staff; Advanced training for clinical staff.

GOAL ID:

Design and implement an Agency-wide community workforce development plan to strengthen our ability to meet the employment and financial stability needs of those we serve.

- Establish community workforce development steering committee and sub-committee.
- Establish community workforce development performance measures and evaluate outcomes of workforce development efforts.
- Integrate best practice workforce assessments, expanding employer/job training partnerships and enhancing “soft skills” training through on-site services or partnerships in all programs.
- Enhance workforce development services in Community Services Division Programs for individuals aged 16-29 years.





STRATEGIC DRIVER **2**

BECOME A MODEL HIGH-PERFORMING ORGANIZATION IN SERVICE TO OUR MISSION.

GOAL 2A:

Align centralized administrative functions to support our service divisions and to optimize efficiency and responsiveness.

- Improve employee efficiency (serve more with less cost) and improve quality of care.
- Develop and implement a Standardized Agency Workforce Performance Evaluation and Development planning philosophy, process and practice.
- Develop process for ensuring competitive and current compensation structure and practice.

GOAL 2B:

Diversify and maximize revenue sources to achieve sustainability.

- Build capacity by identifying new sources of funding.
 - Increase membership in the Good Samaritan Society by 10% per year and increase annual planned giving revenue by 20% per year.
 - Expand and diversify donor cultivation efforts beyond the Catholic community to broaden our donor base.
 - Continue to engage next-generation donors; increase candidates of future major gift donors by 20% per year; increase membership in HYPED by 50%; increase number of members who become lead level donors by 10% per year.
 - Grow number of Leadership Breakfast level donors by 20%; increase revenue from 4.5 million to 6 million dollars.
- Implement the recommendations contained in the 2017 CCS Development Assessment Report.

action steps...

STRATEGIC DRIVER 2 continued

BECOME A MODEL HIGH-PERFORMING ORGANIZATION IN SERVICE TO OUR MISSION.



GOAL 2C:

Review and improve all procurement processes to gain efficiencies and realize cost savings across the agency.

- Create a centralized procurement office.
- Streamline procedure for payments, including integration of purchasing, invoicing and payables system.

GOAL 2D:

Modernize and enhance financial systems and processes to improve efficiency and end user experiences.

- Automate accounts payable invoice workflow, including expense reimbursements and check requests.
- Identify new electronic health records (EHR) system with fully integrated billing solution.
- Identify and implement a financial reporting and business intelligence tool and replace current reporting tool (Microsoft Access).
- Evaluate and implement systems and processes for other key areas of growth.

GOAL 2E:

Implement program performance management systems and processes that support a culture of high performance and support us in achieving positive outcomes with the people we serve.

- Identify and commit to dashboard and performance outcomes for Central Services.
- Review existing data management procedures in Senior Services, Family Services and Central Services and affirm current processes or create new data management standard operating procedures where needed (Community Services SOPs in place).
- Identify and implement an alternative to ETO database system.
- Business Intelligence Steering Committee will create a multi-year plan to review and improve performance management and business intelligence processes and infrastructure agency wide.



STRATEGIC DRIVER 3

PROVIDE AN EXPERIENCE FOR OUR COLLEAGUES, VOLUNTEERS, DONORS AND PARTNERS THAT PROMOTES A SENSE OF DISCIPLESHIP AND ENHANCES LEADERSHIP.

GOAL 3A:

Expand opportunities for deepening the level of engagement and facilitating the growth of our stakeholders.

- Provide meaningful opportunities for witness, encounter and service for our colleagues, volunteers, guests and clients allowing them to develop a deeper and closer relationship with Jesus Christ.
- Ensure that Catholic Charities' colleagues and volunteers have an understanding of, have a continuing formation in and opportunities to grow in our culture as defined by our mission, vision, values and commitments.
- Establish Catholic Charities of Baltimore as the expert on poverty, homelessness, behavioral health, intellectual disabilities, immigration and issues related to aging by proactively pitching the media about CCB programs and mission.
- Complement our existing advocacy efforts with opportunities for clients, staff and external stakeholders to engage in state level advocacy.
- Improve digital communications (the Catholic Charities website and The Vine) to increase constituent engagement.

GOAL 3B:

Become an agency that prioritizes diversity and inclusion.

- Engage a diversity and inclusion consultant to conduct agency-wide diversity and inclusion assessment.
- Design and implement a diversity and inclusion program.
- Establish diversity and inclusion advisory council.
- Measure progress in terms of diversity and inclusion goals as established by programs on annual basis.

action steps...

STRATEGIC DRIVER **3** continued

PROVIDE AN EXPERIENCE FOR OUR COLLEAGUES, VOLUNTEERS, DONORS AND PARTNERS THAT PROMOTES A SENSE OF DISCIPLESHIP AND ENHANCES LEADERSHIP.



GOAL 3C:

Develop and retain more effective leaders and talent across the Agency to position us to achieve Agency performance objectives and provide the best service possible to the people we serve.

- Establish a competency-based leadership development strategy and launch a Leadership Development Program in partnership with Notre Dame University of Maryland (NDMU) around these competencies.
- Provide Management Skills Training for all managers.
- Solicit employee feedback during onboarding and periodically throughout employee life cycle to assess satisfaction and identify areas of improvement.
- Commit to an ongoing Talent Review Process, to be coordinated by the Agency Leadership Team, the HR Leadership Team and a cross functional team of representatives across the agency.



CATHOLIC CHARITIES

CHERISHING THE DIVINE WITHIN ALL

320 Cathedral Street
Baltimore, MD 21201
667-600-2000
cc-md-org