



Transformation 2016

**A 5-year Strategic Plan adopted by
the Board of Directors on May 5, 2011**

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Executive Summary

The past five years for Catholic Charities of the Diocese of Baton Rouge have been marked by two of the worst hurricane seasons on record bringing a permanent change to the community and CCDBR's role within it. In response to Katrina/Rita (2005) and Gustav/Ike (2008) CCDBR became the area's leading disaster recovery agency and expanded its scope of services. At the same time, the Diocese of Baton Rouge experienced unprecedented growth in its population with East Baton Rouge Parish now the most populated parish in the State and still undergoing transition. It is against this backdrop of past change and future uncertainty that the CCDBR Board of Directors formulated its 5-year strategic plan. In the process it reaffirmed its commitment to its Gospel Mission and articulated a vision and a plan for the agency's future.

The plan that emerged, Transformation 2016, underscores the two fundamental tenets of CCDBR's mission: Service to those most in need and a responsibility to improve our community. The Mission states:

We proclaim the Gospel Mission of Jesus Christ as our mission by serving the needs of individuals and families, especially the poorest, and working with Church and Community for justice, peace and compassion in society.

Our mission calls us to make a difference both in the lives of the people we serve and the community in which we exist. Thus the strategic plan calls on CCDBR to engage in a process of producing measureable change at both levels – individual and community – and to do this by working with both individuals and the community. The plan articulates a vision of the future to:

1. Produce change in the lives of the people we serve.
2. Create opportunities for people to work with us and improve our community.
3. Thereby transforming our community to one in which Gospel values of justice and peace are more evident.

For each one of these strategic objectives, the plan lays out concrete steps for CCDBR to undertake that will lead to achieving its goal of continuing to be a dependable community resource in times of great need and for those with great needs while at the same time building a better community, one in which the Kingdom of God may be more readily evident and easily observed.

Vision Statement

TRANSFORMATION 2016

CCDBR BOARD RETREAT DRAFT STRATEGIC PLAN 2/17/2011

Catholic Charities will be Baton Rouge area's leading agent of Gospel-inspired transformative social change through:

1. Producing measureable change in the lives of the people we serve.

For I was hungry and you gave me food. Mt 25

2. Issuing invitations to change for those who share our mission.

*My mother and my brother are those who hear the word of God and
put it into practice. Lk 8*

3. Providing transformative change with our community by joyfully advocating for social justice.

We are our brothers and sisters keepers.
Principles of Catholic Social Teaching

The Planning Process & Themes

The Hurricanes of 2005 – Katrina and Rita – and three years later Gustav and Ike, brought about permanent change in how our nation responds to disasters. It also ushered in the start of a new era of uncertainty and transformation for many communities of south Louisiana, the final outcome of which is yet to be determined. The storms not only disturbed the seas of the Gulf Coast, they released energies of change – economic, demographic, and social – that will permanently alter our landscape. In the 2010 Census, we are already seeing the first indications of what the future will bring as there's been a major shift in Louisiana's population. East Baton Rouge Parish is now the State's most populated civil parish.

Catholic Charities of the Diocese of Baton Rouge is at the center of these vortices – past, present and future. The agency, like its surrounding community, is at a crossroads. It is against this backdrop that the Board of Directors undertook this 5-year strategic planning process to deal with essential, foundational questions; to affirm anew its place within the Diocese and community as a

... affirm anew its place within the Diocese and community as a Catholic expression of Christ's love.

Catholic expression of Christ's love. In the recent past, the daily activities of Catholic Charities seem to have revolved around disaster recovery. But the mission of the agency as an integral part of the Catholic Church is broader and more permanent. It needs to reshape itself to accommodate a new reality and strengthen its traditional links to the Church and community.

The planning process included interrelated phases, each one building on the other and leading to the formulation of a vision of the future for Catholic Charities of the Diocese of Baton Rouge.

Phase I – Historical and Current Situation.

This phase included gathering demographic data on the 12 civil parish service area and review of past strategic plans. An assessment of the agency's current reality and expectations of the process was undertaken through:

- Interviews with the Executive Director and leadership staff.
- A survey administered to all employees, the Board, and key Diocesan staff.
- A planning session with the Executive Committee.

Phase II – Stakeholder Input

This included interviews to gain insight into how external parties viewed Catholic Charities and its role within the Church and community.

- Key diocesan leaders were interviewed to gain perceptions and feedback regarding Catholic Charities and its role in the Diocese.
- Community leaders were interviewed to determine their perspective on the effectiveness of Catholic Charities and its opportunities for expansion or improved services in the future.

Phase III – Board Retreat and Vision

- A board retreat was held at SSA Consultants to review survey and interview results and to reflect upon the agency's past, its current strengths and organizational goals, and anticipated challenges of the future.
- At the end of the retreat, the Board was challenged to articulate a Vision of the Future.

Phase IV – Strategic Plan Development

- Input from the board retreat, internal surveys and discussions, and external interviews were assimilated. Common themes were identified and a plan was developed of how to implement the Vision articulated by the Board.

Three themes emerged during the process. Catholic Charities of the Diocese of Baton Rouge's Strategic Vision of the Future as stated on page 4 of this report builds on these themes.

- I. The Gospel mission of Catholic Charities is its strength and the cornerstone of its work. As Bishop Meunch stated, through service Catholic Charities demonstrates Christ's command: "Love thy neighbor." The 12 civil parishes of the Diocese of Baton Rouge look to Catholic Charities to fill unmet needs. It is respected, trusted and considered the gold standard of non-governmental human service agencies. As one community leader stated, Catholic

Charities is a “nimble” organization that can quickly and meaningfully respond to community crises and individual needs.

While its work and programs are well respected, the impact of its work is unclear, not only to the community, but to funders who increasingly require outcome data. Stewardship of limited resources requires accountability. Love of neighbor is a commitment that requires

The agency is noted in the community for its commitment to quality, and that commitment should be readily quantified.

action. Building the Kingdom is an action that should produce results. It’s not enough to simply deliver services to homeless families or the unemployed, Catholic Charities must demonstrate how many homeless families secured stable housing. How many of its elderly job-fair participants entered the workforce. The agency is noted in the community for its commitment to quality, and that commitment should be readily quantified. Data that shows

success will help the agency communicate its achievements and assist in creating an action plan to develop the remaining two themes.

- II. The full scope and work of Catholic Charities is largely hidden from the broader community, which impairs the agency’s ability to achieve its mission. Its array of services is somewhat of a mystery even to its core supporters, Catholics of the Diocese of Baton Rouge. While families in need know how to access Catholic Charities’ services, socially conscious individuals who wish to give back to the community find Catholic Charities a mystery. The opportunity for community involvement could be most potent in Catholic church parishes.

Board members commented that they themselves wish to be more substantively engaged in the governance and strategic direction of Catholic Charities. The depth of discussion at the retreat should be commonplace at Board meetings. Several commented during the retreat that the Board bylaws and committee structure are outdated. They could be improved to increase opportunities for Board members to fully utilize their skills and connections for the benefit of Catholic Charities.

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Strengthening opportunities for the community to have meaningful involvement in the work of Catholic Charities will strengthen its ability to pursue its mission. As Catholic Charities becomes more open to partnerships and involvement of others, its limited resources can be leveraged resulting in a greater impact.

A vibrant Catholic Charities that is open to the entire community -- both those in need of services and those who wish to give to Catholic Charities -- will be a more complete Catholic Charities. This focus is not only a practical matter of material consideration, but is rooted theologically in the Gospel. The Mission of Catholic Charities is not exclusively for the poor; it states we are to “work with church and community.” As such the agency has a calling to gift the community with opportunities to live the Gospel through acts of generosity and charity.

- III. By the end of the Board retreat, the conclusion and final area of emphasis was apparent; the mission of Catholic Charities reaches beyond the institutions of the Catholic Church and individuals who are served by or share in the work of the agency. As articulated by one board member, Catholic Charities, as an instrument of church should “provide a vision of a community and society where Gospel values of justice, peace and joy are realized.” Catholic Charities should not just meet urgent needs of today, but advocate for a better tomorrow. Board members describe Catholic Charities as a missionary agency. As such, advocacy for social justice has a long Catholic tradition and is acknowledged in the agency’s mission, which state’s that Catholic Charities should “proclaim” the Gospel by working for “justice, peace and compassion in society.”

As articulated by one board member, Catholic Charities, as an instrument of church should “provide a vision of a community and society where Gospel values of justice, peace and joy are realized.”

A strength noted during the process both by board members and external stakeholders is that Catholic Charities seeks to not only help families and individuals meet their needs, but does so while affirming human dignity.

Catholic Charities should champion the sanctity of life for individuals and the surrounding society. Catholic Charities, in collaboration with individuals and other organizations, should be an agent of transformative, Gospel-inspired change for the Baton Rouge area.

The following plan elaborates on these strategic initiatives, and provides specific goals that will help measure the agency’s progress in each area.

Strategic Plan

Catholic Charities will be Baton Rouge area's leading agent of Gospel-inspired transformative social change through:

I. Measureable change in the lives of the people we serve.

For I was hungry and you gave me food." Mt. 25

God is a creator; a God of action. Jesus told us it's insufficient to only talk about our faith. Prayer leads to action. Action leads to specific, tangible, material results. Food for the hungry. A home for the homeless. Therefore, the first priority for Catholic Charities of the Diocese of Baton Rouge will be to make a measureable difference in the lives of the people we touch and that we demonstrate not only the quantity of services we deliver, but the quality of our results and interactions with clients.



Goal A - Each program will have concrete, measureable outcomes.

Actions:

1. All programs will have reportable outcomes
2. A common data system will be implemented throughout the agency.
3. Routine and required processes of data entry will be incorporated into all positions.
4. Expertise and competency will be secured.

Goal B - Customers and clients will have a voice in evaluating services received.

Actions:

1. Feedback mechanisms such as routine surveys and occasional focus groups will be an integral part of every service and activity of CCDBR.

Goal C – CCDBR will document for the community that it holds itself to the highest standards of accountability and quality.

Actions:

1. CCDBR will obtain appropriate "certifications" and achieve compliance with industry standards such as those of the Council of Accreditation and requirements of Sarbanes-Oxley.

Goal D – The results of an outcomes-focused approach to service delivery will be communicated and reported to the community.

Actions:

1. Expectations regarding services offered and consequent results will be clearly communicated to staff, clients, board members and all stakeholders.
2. Outcome reports will be routine at board meetings, for funders, and incorporated into the annual report.

II. Invitations to change for those who share our mission.

My mother and my brother are those who hear the word of God and put it into practice. Lk. 8

We become fully integrated into the body of Christ when we respond to God's love by living as He invites us to through acts of charity and generosity. As followers of Christ, we experience the fullest embodiment of our created existence when we give to one another. In giving, not only the recipient is changed and blessed, but the giver. Since the Kingdom of God is at hand, all Christians are invited to live in the Kingdom in the present moment through our actions. We all have a fundamental human and spiritual need to share our individual talents and personal gifts with each other. Catholic Charities of the Diocese of Baton Rouge will therefore invite the community to participate in its mission of serving those in need by offering opportunities for individuals to share substantively in its mission. Substantive, meaningful engagement not only respects individual talents, it also honors the Gospel call of Christ in those who wish to join us in our mission of service. This strategic goal will be pursued on multiple levels at the staff level, the board, within the Catholic Church and also brought to the broader community. One does not have to be Catholic, nor even Christian, to experience the joy of giving.



Goal A –Staff will be substantively engaged in sharing the mission and seeing the impact of their work.

Actions:

1. Quarterly staff meetings will offer opportunities for spiritual reflection and growth.
2. Performance appraisals and job descriptions will reflect this dimension of our work.

3. As outcome measurements are put in place, the results of their work will be reported to them.

Goal B -- Board members will be substantively engaged in sharing the mission and seeing the impact of their work.

Actions:

1. Board roles and responsibilities will be clearly articulated in the agency's bylaws and Articles of Incorporation.
2. Board members will become active ambassadors to the community, not only in telling others about the agency's work, but by becoming active in issuing invitations to others to join us.
3. Board recruitment and development activities will reflect the "spirituality of giving."

Goal C – Catholic Charities will develop a vibrant, meaningful volunteer recruitment capacity to enable like-minded individuals to share in our mission. Volunteer services will be treated as an integral component of the agency's complete services to the community.

Actions:

1. Formal job descriptions for volunteer positions will be developed.
2. Regular recruitment activities will be held.
3. An agency-wide volunteer orientation and training program will be developed.

Goal D – Partnerships and collaborations -- especially with Catholic parishes and schools--that create opportunities for involvement will be implemented.

Actions:

1. New initiatives will be started at the parish level.
2. A method of reporting CCDBR activities for each church parish will be implemented.

Goal E – Opportunities for charitable giving and providing financial support for the agency's mission will be enhanced and coordinated with the Chancery.

Actions:

1. The Board will become substantively engaged in this goal.
2. A development department will be formed.
3. An annual cycle of events and fund-raising opportunities will be developed.
4. Corporate and individual donors will be identified and approached.



III. Transformative change with our community by joyfully advocating for social justice.

We are our brothers and sisters keepers. Principles of Catholic Social Teaching.

Respect for human dignity is not only an individual responsibility, it is a social obligation. It's not enough to do a good act if we ignore the underlying causes of human suffering. Christ not only met the immediate needs of people to whom he ministered, he showed us a better way for the future. At all times, our work should strive to reorder not only individual relationships but broader social conventions, decisions, and actions of public and private agencies that allow disparity to exist and unequal opportunity to regenerate. Economics, politics, laws and policies--all of these impact individual opportunity. It's important that such advocacy be conducted in the spirit of Christ, as a joyful invitation to build a better community rather than a condemnation of viewpoints we may disagree with. The tone of advocacy initiatives is as important as the substance. Our advocacy should be "with" others, not something we "do" to the community.



Goal A – Catholic Charities should devote resources to identifying and engaging in opportunities to advocate for social justice.

Actions:

1. Establish a process of respectful listening to identify opportunities for social change through activities such as Parish Hall meetings or client focus groups.
2. Create an inclusive process for prioritizing advocacy issues and defining positions that would include Board, Chancery, staff, clients and parishes.
3. Become a trustworthy voice for social change through activities such as workshops, position papers, use of DOBR and mainstream media.