Vision 2015

A Strategic Plan for

Catholic Charities of the Diocese of Arlington

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**Introduction**

“The Church’s deepest nature is expressed in her three-fold responsibility of proclaiming the word of God (kerygma-martyria), celebrating the sacraments (leitourgia), and exercising the ministry of charity (diakonia). These duties presuppose each other and are inseparable. For the Church, charity is not a kind of welfare activity which could equally well be left to others, but is a part of her nature, an indispensable expression of her very being.”

- "Deus Caritas Est," Pope Benedict XVI

Catholic Charities of the Diocese of Arlington (CCDA) serves the 21 counties and seven independent cities of the northern half of Virginia and is commissioned by the Catholic Church to enact the gospel message through its programs to serve the poor and vulnerable. CCDA, through the work of a professional staff of over 100 and over 1,000 volunteers, offers programs that include a soup kitchen, food pantries, emergency financial assistance, immigration assistance, senior services, adoption services, prison ministry, shelter, transitional housing, migration and refugee services, and outpatient psychotherapy. Vision 2015 addresses the effective provision of these community-based programs for the Diocese of Arlington. It will enable CCDA to continue to provide services to people in need, advocate for justice and to call the entire Catholic Church and other people of good will to do the same.

CCDA has an extensive history of strategic planning within the Agency. During the early 1990s, CCDA began work on a five-year plan, Vision 2000. As the strategic plan, Vision 2000 was designed to provide the direction necessary to take the Agency where it needed to be as the diocesan social services provider. As the year 2000 approached, the Agency began work on the next five-year plan, Vision 2005, based on revised mission and vision statements that had been approved by the Most Reverend Paul S. Loverde, Bishop of Arlington.

The 2000 and 2005 strategic plans included focus group and survey research to guide the planning efforts. Six to eight focus groups comprised of clergy, parishioners and nonprofit affiliates discussed unmet human services needs and five-year emerging trends. Approximately 700 priests, key parishioners, donors and non-profit affiliates participated in a human needs assessment survey, soliciting feedback regarding current and future programs and services. Building off of the 2000 and 2005 strategic plans, CCDA developed and implemented Vision 2010+ which expanded existing services and emphasized outreach to rural counties.

CCDA embarked on the development of Vision 2015 in August 2009. The approach to the planning process for the development of Vision 2015 was quite different than for earlier strategic planning efforts in that the CCDA Board Planning Committee and executive management engaged the pro bono planning services of Accenture consultants specializing in non-profit Agency strategic planning. Furthermore, whereas earlier strategic plans addressed specific action plans, the strategic planning effort leading to Vision 2015 was focused on the strategic direction of the Agency, both internally and externally. With this framework established, there is still a need to develop specific action plans.

The end result of the robust planning effort was the development of three major goals: (1) Serve Those in Need, (2) Embody the Catholic Identity, and (3) Strengthen the Organization. The first two goals are externally focused and are designed to enhance CCDA’s profile in terms of those served and those supporting the programs through referral, funding and volunteer support. The final goal is internally
focused with the intent of improving administration, communication, reporting and decision making in order to leverage the existing platform and facilitate the ability to realize the first two externally focused goals. It is expected the majority of the strategies implemented in support of the final goal will be accomplished over the next couple of years, whereas the strategies in support of the two externally focused goals will be ongoing.

Several objectives were formulated to facilitate the realization of each goal, and then specific strategies were devised to accomplish the specified objectives for each goal (See Appendix A: Vision 2015 Framework). The goals that have been established may extend well beyond 2015, although it may be necessary to update the objectives and strategies in the Vision 2020 effort as internal and external circumstances in the future can be expected to be different that what exists today.

This document is the result of hard-won efforts at engaging internal and external stakeholders to define a new direction for the future. Surveys were distributed to the Board, Agency leadership, staff members and major donors to identify Agency strengths, weaknesses and future priorities. In addition, more than 20 interviews were conducted with Board members, program staff (line and management), Parish representatives/clergy and social service agencies. This planning effort has been quite rigorous, frequently involving considerable meetings, conference calls and e-mails between the Planning Committee members, the President of the Board and the more than the half dozen Accenture consultants assigned to this engagement (See Appendix B: Vision 2015 Strategic Planning Approach).

Now that the framework for Vision 2015 has been developed, and once the comments of Bishop Loverde have been fully integrated and his approval has been received, it will incumbent upon the CCDA Planning Committee to remain integrally involved as specific action plans, timetables, budgets and execution responsibilities are fully developed to ensure that there is consistency with the overall goals, objectives and strategies set forth herein. Accordingly, unlike earlier strategic planning efforts in which the role of the Planning Committee was completed once the plan had received Bishop approval, it would be appropriate that the Planning Committee, including members of Executive Management, would continue to meet periodically and make reports to the full Board and/or the Executive Committee of the Board on CCDA’s progress in the implementation of Vision 2015.

With this unique opportunity to enhance its programs and services, CCDA will strive to build a just and compassionate society and serve those who are most vulnerable and in poverty in Northern Virginia.
Vision

As the designated arm of the Diocese of Arlington in fulfilling the Church’s social mission, CCDA facilitates the response of the Catholic community to basic human needs, regardless of religious affiliation, as well as collaborates with other agencies and organizations that share our goals. CCDA strives to:

- Integrate the Agency’s activities with the mission of the Diocese, collaborate effectively with diocesan offices and serve as a resource to parishes.
- Provide caring, professional and quality services, including those that require specialized training, to families, individuals and communities with needs not being met by the local community.
- Extend programs and services throughout the Diocese and increase collaboration with other agencies and organizations that share our mission and goals in order to better address unmet needs while avoiding duplication of services.
- Develop adequate funding and other resources to support the mission and implement the vision of Catholic Charities.

Mission

The mission of Catholic Charities of the Diocese of Arlington is rooted in the Gospel of Jesus Christ and the official teachings of the Roman Catholic faith.

The Gospel proclaims and the Church teaches respect for the dignity and sanctity of human life, from the moment of conception through natural death, and the duty to serve the most vulnerable of God’s people.

Therefore, Catholic Charities seeks to implement the Church’s mission of social justice in the Diocese of Arlington in ways that strengthen individuals, families and communities.

Catholic Charities extends its services and resources to all in need; convenes the Catholic community to fulfill the Church’s mission of social justice; and advocates for social justice and seeks to empower others to do the same.
Background

CCDA has undergone significant organic expansion and acquisition of other diocesan programs since its formation over 60 years ago, such that the scope has transformed from a small operation with one program and a limited budget to one that now has 12 programs serving more than 35,000 individuals and families through 14 locations throughout the Diocese, with a budget exceeding $7 million. Today, CCDA employs over 100 staff member and maintains more than 1,000 volunteers. Since the expansion has been significant in recent years, organizational, operational and financial changes have been made to meet the challenges posed by strong growth and increased demand by those served by CCDA.

Catholic Charities of Northern Virginia (CCNV) was established in February 1947 under the authority of Bishop Peter Leo Ireton. Children’s Services was the first service to be offered by the new Agency. As the area’s population continued to increase, so did requests for the scope of geographic coverage of the services provided. At this time, the Agency offered services to unmarried mothers, including foster care, adoption services and some financial assistance. Given the administrative complications with the Richmond home office, it became necessary to establish a separate corporation in 1959.

1974 marked an important year as the 21 counties and seven independent cities of the Diocese of Richmond located in Northern Virginia were organized as the Diocese of Arlington. Therefore, the Agency became Catholic Charities of the Diocese of Arlington, Inc.

By 1981, the Agency was offering the following programs: Children’s Services, Family Services, St. Martin de Porres Senior Center, Christ House Shelter, Emergency Assistance, Immigration and Refugee Services, Prison Ministry, Child Development, Neighborhood Development and the Winchester District Office. Shortly thereafter, Parish Social Ministry, Services to the Disabled and AGAPE Hispanic Social Services were added as programs. In 1990, the Fredericksburg District Office was founded to serve the southern part of the Diocese with both Children’s Services and Family Services. In 1994, CCDA subsumed Hogar Hispano as a new program, allowing CCDA to provide immigration support, emergency assistance, English language training and other services to immigrants.

In June 2003, Stephen Luteran became the Agency’s first lay Executive Director, which was a key stabilizing step to the Agency’s more formal operations, as previously the administration was led by parish priests who had many other responsibilities. The growth in programs, the numbers of those served and the increased staffing required direction by a qualified full time lay director with an extensive educational and professional background in social work.

Christ House was completely renovated in 2007. The same year, Catholic Charities established a new Western Regional Office in Leesburg, VA. In March 2009, the Agency opened St. Margaret of Cortona Transitional Housing for homeless families. In October 2009, the diocesan Migration and Refugee Services merged with CCDA.
Today at CCDA: A Business Assessment Summary

In 2010, CCDA finds itself at an important intersection—many successful programs with significant growth, a challenging economic situation that impacts both demand for services and the amount of available funding, and a large Diocese with an underserved population spanning diverse urban and rural areas. To effectively plan for the next five years, CCDA undertook the effort of understanding where it stands today. The CCDA Business Assessment evaluated the Agency across four primary business areas of focus: Governance, Service Delivery, Performance Management and Resources. Complemented by a review of needs across the Diocese, each area was evaluated for strengths and weaknesses, using interviews, survey data and other research sources as evidence. While the business assessment revealed that there are some areas where CCDA is doing extremely well, it became apparent that there is opportunity for improvement in a number of other areas. Through Vision 2015, CCDA will build upon existing and proven strengths and successes within its operations to better meet the increased demand for services, enhance program funding, and improve administrative processes as the Agency continues to leverage the current platform of programs provided throughout the Diocese.

**Governance** represents strategic direction setting, monitoring, formal communications processes and strategic decision-making for CCDA. The assessment of this area found that:

- Open communication channels with senior management serve as a valuable asset to programs and staff;
- The agency’s broad mission makes prioritization and execution challenging; and
- There is an opportunity to improve or optimize decision-making processes to avoid confusion at all levels of CCDA.

**Service Delivery** encompasses the development, maintenance and management of CCDA programs, including processes and operations. The assessment of this area found that:

- Programs are meeting many needs in their communities, and some are recognized for excellence in service delivery;
- CCDA central office needs to be more proactive in supporting programs, rather than reactive; and
- Improved collaboration between programs will provide an opportunity to improve delivery success through adoption of “best practices”.

**Performance Management** includes the development of an approach for achieving CCDA’s mission, vision and strategic objectives and definition of measures of success and impact across the organization. The assessment of this area found that:

- Target outcomes could be better defined and articulated across the organization;
- An opportunity exists to better define and manage organizational and program performance metrics; and
- Some programs are effective at performance measurement and can serve as examples for the organization.

**Resources** relates to the management of the human and financial resources needed to support CCDA operations to ensure that programs are sufficiently staffed and funded. The assessment of this area found that:
• Donor engagement remains relatively strong despite the economic downturn, and there are a number of large donors interested in supporting expansion of specific CCDA programs;
• Funding constraints and financial allocation complexity serves as limits to CCDA and its programs; and
• There is an opportunity to enhance human resource management, including human capital development and resource allocation.

CCDA applied the strategic context provided through the Business Assessment into the Vision 2015 strategic plan to ensure that opportunity areas are considered in annual planning efforts. Vision 2015 offers CCDA a framework to leverage its capabilities into meeting the challenges that it faces today and capitalize on its strengths and opportunities.
The Future at CCDA - Strategic Goal 1: Serve Those in Need

CCDA’s commitment to extend its programs and resources to all in need is supported by the community, but its efforts are complicated by internal and external challenges. Moving forward, CCDA will focus on making several organizational and process enhancements in order to most effectively meet the needs of the disenfranchised and destitute within the Diocese through the current programs offered.

Objective 1.1 Support poor and vulnerable populations
CCDA will identify the populations within its community who are in most need of our services. CCDA’s target client base will drive which populations are served, and CCDA will develop methods and metrics to track these outreach and delivery efforts. CCDA will assess its core competencies annually to ensure that they meet the current needs of those at-risk members of the Diocese of Arlington.

Objective Key Outcome: CCDA has the delivery channels and core competencies needed to effectively serve poor and vulnerable populations.

To better provide services to the poor and vulnerable, CCDA will execute the following strategies:

- Develop a needs-assessment approach to determine that current programs are aligned with the needs of the CCDA community
- Identify and implement the best channels for meeting needs of the community given the CCDA core competencies/core programs
- Expand core programs and assess those competencies on an annual basis/future direction

Objective 1.2 Expand geographic presence within the Diocese
To successfully expand its geographic footprint, CCDA will expand its services to areas where it does not currently have a presence and there is an identified need. CCDA can utilize existing program models to provide services and resources to new areas, having analyzed the costs and benefits of doing so. Diocesan parishes will serve as key channels in delivering services in a resource-effective manner to hard-to-reach areas.

Objective Key Outcome: CCDA provides its services to a client base in need in a new geographic area.

To expand services to different geographic areas within the Diocese, CCDA will execute the following strategies:

- Utilize delivery channels and existing program services to expand into outlying areas where CCDA does not have a presence
- Develop an analytical approach to formulate outcomes and develop cost effective method for expanding CCDA services to outlying areas derived from clear assessment of needs
- Utilize parishes (facilities and people) and other service organizations in outlying areas where CCDA does not have a presence
**Objective 1.3  Embrace outreach and collaboration**
CCDA will partner with other organizations to leverage and enhance services provided by the Agency. The Board and Staff will work collaboratively to create an outreach plan to increase CCDA’s visibility with service partners, so that CCDA and its partners better understand how each can best serve the poor and vulnerable within the Diocese.

*Objective Key Outcome: CCDA provides a continuum of services to its client population through partnerships with community providers.*

To increase outreach and collaboration with social services partners, CCDA will execute the following strategies:

- Identify strategic opportunities for partnership with those who respect Catholic teaching, to better serve clients in the most cost effective way
- Formalize an approach and mechanisms for communication/collaboration external to the organization (e.g. partners, customers, donors) to ensure client needs are being met
- Develop an outreach plan to increase CCDA visibility (Staff and Board) with service partners that respect and/or share the Catholic identity

**Objective 1.4  Focus fundraising and budgeting**
CCDA aspires to meet the growing needs of its community, and so the financial resources of the Agency will need to grow, as well. CCDA will formalize the development processes and systems to enable us to acquire new donors and cultivate and provide stewardship to existing donors that reinforces the unique CCDA mission and brand. Once funding has been obtained, clear processes for allocating funds across the organization will be followed, while continuing to honor major donor-specific objectives.

*Objective Key Outcome: Donors have a clear understanding of the value and impact their funds have upon CCDA’s programs and clients.*

To strengthen fundraising and enhance CCDA operations, CCDA will execute the following strategies:

- Develop a clearly articulated, Board-backed, Agency-inclusive Case Document, while honoring "major" donor specific funding objectives
- Strengthen the unified funding model through building the "retail" and "major" donor databases to increase operating funds and major gifts support, respectively
- Create program grassroots campaigns targeting "retail" donors to support program needs and "major" donor recognition levels connected to specific programs

**Objective 1.5  Adhere to uniform program performance management processes and target outcomes**
CCDA will develop standard and accurate ways to measure success at both the organizational and program level to ensure that the Agency is truly meeting the needs of the Diocese. CCDA leadership will work with each program to create a scorecard for the organization, which will help standardize internal and external reporting on outputs and outcomes and better inform decision making.

*Objective Key Outcome: CCDA’s Board and staff uniformly evaluate and make well-informed decisions about programs.*
To create a performance management framework within Agency programs, CCDA will execute the following strategies:

- Develop metrics to ensure that CCDA programs are effective in serving these client populations
- Develop target outcomes, as well as outputs, at the organizational and program level to help inform decision-making
- Develop an organization-wide scorecard (with consensus from each program)
- Develop and implement consistent internal and external reporting standards, so that the Board and staff can uniformly evaluate programs
The Future at CCDA - Strategic Goal 2: Embody the Catholic Identity

CCDA has a unique role as the face of the Catholic Church to those in need. This position gives CCDA the opportunity and obligation to unite Catholics in the Diocese of Arlington under the mission of social justice and to embody the teachings of the Church through its service.

**Objective 2.1 Connect Catholics to community service**
To address potential misperceptions regarding the identity of CCDA seeks to raise its profile throughout the Diocese among the parish community, volunteers, donors, other agencies, and, importantly, among those served by the Agency, it is critical that CCDA develop and execute plans to increase the visibility of CCDA. Further, a large opportunity exists for CCDA to take advantage of the energy, professional skills and financial capacity of parishioners throughout the Diocese to support the Agency’s programs.

*Objective Key Outcome: Catholics in the Diocese of Arlington look to CCDA as their preferred charitable option to support.*

To increase its visibility with Catholics in the Diocese of Arlington, CCDA will execute the following strategies:

- Complete the development and execute a marketing and communication plan for increasing the visibility of CCDA to Catholics in the Diocese
- Strengthen and expand the volunteer program to provide skill-based and other opportunities for Catholics to serve

**Objective 2.2 Emphasize Catholic faith and values in community service**
A key component of embodying the Catholic identity is emphasizing Catholic teachings through all of CCDA’s activities. CCDA can make this connection by working with other diocesan locations and by focusing on initiatives that address Catholic values. CCDA will be successful if the community recognizes CCDA activities as both meeting the needs of the poor and vulnerable in the Diocese and exhibiting Catholic values.

*Objective Key Outcome: CCDA volunteers and recipients of services experience Catholic faith and values in their interactions with CCDA.*

To continue to emphasize Catholic faith and values, CCDA will execute the following strategies:

- Focus on faith-based initiatives that address Catholic values within programs
- Create opportunities for partnership with diocesan organizations

**Objective 2.3 Enhance the CCDA brand**
CCDA will differentiate its brand from other organizations in the Diocese of Arlington and communicate its mission through the brand. Further, CCDA will ensure that there is organizational buy-in on the CCDA brand and that it is consistently communicated externally.

*Objective Key Outcome: CCDA is perceived by internal and external stakeholders as the social service arm of the Catholic Church in the Diocese of Arlington.*
To enhance the Agency brand, CCDA will execute the following strategies:

- Enhance the CCDA brand so that it more clearly and effectively communicates the unique CCDA mission and programs
- Standardize all program communications to be consistent with the CCDA brand
The Future at CCDA - Strategic Goal 3: Strengthen the Organization

CCDA’s staff members are its greatest assets, but the Agency still has room to enhance the organization through improved processes, reporting, communication and decision making. CCDA will ensure that its people have the resources that they need to do their jobs as effectively as possible. Furthermore, as CCDA continues to grow, it will make decisions in an open, but structured, manner. Finally, CCDA will embrace an organizational culture where short-, medium- and long-term planning is rooted in Vision 2015.

Objective 3.1 Focus human resources capacity
The Agency will ensure that its people are developing as employees, as well as provide a workplace that engenders support and goodwill. To maximize and leverage employee skills, CCDA will provide regular opportunities for its people to provide feedback on current and planned initiatives.

Objective Key Outcome: CCDA has the staff and volunteers required to meet its needs, and those individuals have a role in shaping the future of CCDA.

To increase and deepen human resource capacity within the Agency, CCDA will execute the following strategies:

- Implement a Human Capital Strategy that defines how to better recruit, hire, orient, train and develop staff and optimally utilize staff and the volunteer network to meet client needs
- Increase dialogue with staff, including development of regular feedback loops and a plan to engage employees at all levels across the organization
- Increase and enhance CCDA’s volunteer program to increase and improve service provision.

Objective 3.2 Implement uniform business processes and enabling technologies
CCDA strives to operate using standard, efficient processes. By enhancing communication channels throughout the organization, programs can share successful practices with other programs to increase overall effectiveness. The Agency will evaluate the use of technology to improve operations; specifically, communication and collaboration between various groups.

Objective Key Outcome: CCDA has clearly defined business processes that are understood throughout the organization.

To implement consistent business process and technologies within the Agency, CCDA will execute the following strategies:

- Adopt uniform and consistent business practices across all Agency programs
- Formalize communications channels and processes across the organization
- Create a unified infrastructure for data, web and voice requirements that aligns the business needs as one organizational unit with multiple programs
- Establish standard policies and procedures that enforce IT best practices
• Ensure CCDA central office focuses on building processes for exchanging knowledge and sharing best practices / lessons learned across the organization

**Objective 3.3 Make decisions and responsibilities clear and transparent**
Consistent decision-making roles and communications will enable the CCDA organization, from top to bottom, to understand the rationale and the impact for each major Agency decision. To accomplish this, CCDA will clearly delineate roles and responsibilities between the CCDA Board of Directors, senior leaders and programs. CCDA will consider organizing Board members by function, rather than program, to promote a broader focus in decision-making across the organization. Finally, the Agency plans to establish a standard Communications Plan for disseminating key decisions so that consistent and appropriate information is being communicated to everyone.

*Objective Key Outcome: Agency-wide understanding of how decisions are made.*

To clarify governance and decision-making processes, CCDA will execute the following strategies:

• Clearly delineate roles, responsibilities and processes for the Board, Board committees, senior and middle management and program directors
• Evaluate the effectiveness of the Board, committees and liaisons compared to best practices
• Create a Communications Plan for disseminating all key decisions across the organization

**Objective 3.4 Adopt a strategic planning culture at CCDA**
The Vision 2015 plan will serve as a roadmap to the whole of CCDA, serving as the reference point for making decisions and prioritizing initiatives at CCDA over the next five years. Vision 2015 will be at the center of planning processes across the organization – from annual Agency plans, to day-to-day decision-making within programs. Agency leads will seek feedback from stakeholders on a regular basis, and plans will be communicated throughout the organization as they are developed.

*Objective Key Outcome: CCDA makes decisions through a clearly articulated strategic planning framework.*

To integrate the strategic planning culture within the Agency, CCDA will execute the following strategies:

• Use Vision 2015 development to set the means to prioritize and make business decisions within the wider organizational mission
• Gain buy-in on Vision 2015 from all relevant stakeholders across the organization as early as possible and then communicate the plan on a regular basis
Benefits of the Plan

This Strategic Plan will assist CCDA in meeting current and future demand for social services and community programs, thereby supporting its mission and vision into the future. By providing a framework for prioritizing initiatives and evaluating performance using key measures and milestones, the plan will improve CCDA’s effectiveness in the following ways:

**Increased Program Effectiveness**
This Strategic Plan will be integrated into current annual and short-term program planning processes and provides a framework to define performance measures that will assess achievement of the current CCDA programs. In addition, reinforcement of the Vision 2015 in communications and coordination activities will ensure that the plan is adopted by CCDA staff, management and Board members and easily communicated to external stakeholders in the community.

**Improved Engagement between CCDA and Social Service Partners**
CCDA serves a diverse population within Northern Virginia and surrounding counties, with varying needs and priorities. Successfully meeting the needs of its different clients requires close collaboration with different social service and government agencies that can provide additional channels for people in need. The Vision 2015 Plan will help CCDA identify or improve methods for engaging with existing and potential partners and provide measures to gauge the improvements to performance associated with better communication and collaboration.

**A High-Performing Workforce**
This plan will help the Agency align the knowledge and skills of its workforce with the five-year strategy by articulating CCDA’s goals and objectives. Using Vision 2015 Strategic Plan to guide initiatives to enhance the development of CCDA staff members’ skills and expertise will help build a workforce that effectively meets the Agency mission. In addition, the implementation of standard and consistent business processes and technologies will assist the CCDA workforce increase efficiency and the quality of services.
Appendix A: Vision 2015 Framework

Goal    Obj.    Strategy

1.0 Serve Those in Need

1.1 Support poor and vulnerable populations
   1.1.1 Develop a needs-assessment approach to determine that current programs are aligned with the needs of the CCDA community
   1.1.2 Identify and implement the best channels for meeting needs of the community given the CCDA core competencies/core programs
   1.1.3 Expand core programs and assess those competencies on an annual basis/future direction

1.2 Expand geographic presence within the Diocese
   1.2.1 Utilize delivery channels and existing program services to expand into outlying areas where CCDA does not have a presence
   1.2.2 Develop an analytical approach to formulate outcomes and develop cost effective method for expanding CCDA services to outlying areas derived from clear assessment of needs
   1.2.3 Utilize parishes (facilities and people) and other service organizations in outlying areas where CCDA does not have a presence

1.3 Embrace outreach and collaboration
   1.3.1 Identify strategic opportunities for partnership with those who respect Catholic teaching, to better serve clients in the most cost effective way
   1.3.2 Formalize an approach and mechanisms for communication/collaboration external to the organization (e.g. partners, customers, donors) to ensure client needs are being met
   1.3.3 Develop an outreach plan to increase CCDA visibility (Staff and Board) with service partners that respect and/or share the Catholic identity

1.4 Focus fundraising and budgeting
   1.4.1 Develop a clearly articulated, Board-backed, Agency inclusive Case Document, while honoring "major" donor specific funding objectives
   1.4.2 Strengthen the unified funding model through building the of "retail" and "major" donor databases to increase operating funds and major gifts support, respectively
   1.4.3 Create program grassroots campaigns targeting "retail" donors to support program needs and "major" donor recognition levels connected to specific programs

1.5 Adhere to uniform program performance management processes and target outcomes
   1.5.1 Develop metrics to ensure that CCDA programs are effective in serving these client populations
1.5.2 Develop target outcomes, as well as outputs, at the organizational and program level to help inform decision-making
1.5.3 Develop an organization-wide scorecard with consensus from each program
1.5.4 Develop and implement consistent internal and external reporting standards so that the Board and staff can uniformly evaluate programs

**Goal**  **Obj.**  **Strategy**

### 2.0 Embody the Catholic Identity

**2.1 Connect Catholics to community service**

2.1.1 Complete the development and execute a marketing and communication plan for increasing the visibility of CCDA to Catholics in the Diocese
2.1.2 Strengthen and expand the volunteer program to provide skill-based and other opportunities for Catholics to serve

**2.2 Emphasize Catholic faith and values in community services**

2.2.1 Focus on faith-based initiatives that address Catholic values within programs
2.2.2 Create opportunities for partnership with diocesan organizations

**2.3 Enhance the CCDA brand**

2.3.1 Enhance the CCDA brand so that it more clearly and effectively communicates the unique CCDA mission and programs
2.3.2 Standardize all program communications to be consistent with the CCDA brand

### 3.0 Strengthen the Organization

**3.1 Focus human resources capacity**

3.1.1 Implement a Human Capital Strategy that defines how to better recruit, hire, orient, train and develop staff and optimally utilize staff and the volunteer network to meet client needs
3.1.2 Increase dialogue with staff, including development of regular feedback loops and a plan to engage employees at all levels across the organization
3.1.3 Increase and enhance CCDA’s volunteer program to increase and improve service provision

**3.2 Adopt uniform business processes and enabling technologies**

3.2.1 Adopt uniform and consistent business practices across all Agency programs
3.2.2 Formalize communications channels and processes across the organization
3.2.3 Create a unified infrastructure for data, web and voice requirements that aligns the business needs as one organizational unit with multiple programs
3.2.4 Establish standard policies and procedures that enforce IT best practices
3.2.5 Ensure CCDA central office focuses on building processes for exchanging knowledge and sharing best practices / lessons learned across the organization

**3.3 Make decisions and responsibilities clear and transparent**
3.3.1 Clearly delineate roles, responsibilities and processes for the Board, Board committees, senior and middle management and program directors
3.3.2 Evaluate the effectiveness of the Board, committees, and liaisons compared to best practices
3.3.3 Create a Communications Plan for disseminating all key decisions across the organization

3.4 **Adopt a strategic planning culture at CCDA**

3.4.1 Use Vision 2015 development to set the means to prioritize and make business decisions within the wider organizational mission
3.4.2 Gain buy-in on Vision 2015 from all relevant stakeholders across the organization as early as possible and then communicate the plan on a regular basis
Appendix B: Vision 2015 Strategic Planning Approach

CCDA sought to develop a five-year Strategic Plan to follow Vision 2010 that was aligned with the organization’s mission and community needs and could be successfully implemented in the current environment. The CCDA Board of Directors’ Planning Committee conducted the work in two phases; the Business Assessment and the Vision 2015 Strategic Goals & Objectives.

The Business Assessment evaluated current CCDA program performance, organization operations and addresses client/community needs. It reflected:

- Interviews with key CCDA stakeholders, including the CCDA Board of Directors, Staff, Parish Representatives (Clergy) and Customers (Service Partners);
- Survey information from the CCDA Board of Directors, Donors and Staff; and
- Research on CCDA and the overall environment, including county consolidated plans, CCDA audit/financials, program evaluations and other resources.

The Business Assessment served as the basis for the Vision 2015 Strategic Goals & Objectives phase, which involved focused group discussions with the Board’s Planning Committee to identify the five-year target for the organization and arrive at a proposed Vision 2015. The draft goals and objectives were presented at an All-Staff meeting to introduce them across the organization and attain organizational buy-in. Due to scope and schedule, the Vision 2015 only defined goals, objectives and strategies. Other strategic elements, such as core competencies, guiding principles and performance measures, were not defined as part of this process.

Upon completion of this phase, the team documented the findings into the Vision 2015 Five-Year Strategic Plan and presented it to the CCDA Board of Directors for approval and submission to the Bishop for approval October 5th, 2010.