Strategic PLAN

Catholic Charities

MARIN • SAN FRANCISCO • SAN MATEO

JULY 2018
Dear Friends,

You may be surprised to learn that for more than 110 years, Catholic Charities has quietly delivered essential human services to hundreds of thousands of San Francisco, San Mateo, and Marin county residents. We have been an integral part of our communities, helping bolster and empower our neighbors when they most need help, solutions, and uplift. As one of the largest and oldest agencies, we are the backbone of human services in the Bay Area.

We have arrived at an important moment in our long history. One that encourages us to own our contributions to the health of our communities and move forward with strength, dedication, and clarity about the future – our shared future.

As our community has grown with the technology boom, so has the pressure on families and individuals struggling to survive and thrive here. Catholic Charities’ comprehensive, wrap-around services for and advocacy on behalf of those in need are more crucial today than ever before. With our exceptional staff, strong partnerships, data-driven programs, and committed Board of Directors, we are enthusiastically determined to increase our impact to meet the needs of our community.

To get there, we are pleased to share with you our Catholic Charities Strategic Plan – our guidepost for the continued fruition of our vision and work. Founded on analysis and feedback, it enumerates our five key strategic priorities against which all our activities are measured and the tangible objectives for achieving them.

We are confident in our ability to reach more clients in need – the single mothers, homeless adults and those living with disabilities, seniors, children and youth, and immigrants and refugees – that rely daily on Catholic Charities for help, hope, and dignity. Please partner with us to bring light and real solutions to our community as we tackle the problems of the future together.

Blessings,

Jilma L. Meneses
Chief Executive Officer
Catholic Charities was created 110 years ago as a response to the devastating 1906 earthquake and has grown into one of the largest, most comprehensive human service agencies in Northern California. We reach more than 35,000 individuals a year in San Francisco, San Mateo, and Marin counties by providing homelessness and housing services, children and youth services, aging support services, and refugee and immigrant services. We are compassionate caregivers, ardent advocates, and champions of those in need.
25,459
YOUTH SERVED
Overall IMPACT

Homelessness & Housing Services: 3,024 clients housed and safe

Refugee & Immigrant Services: 2,003 consultations and cases

Children & Youth Services: 25,459 youth served

Aging Support Services: 2,332 seniors and adults with disabilities served
Yearly serving more than 35,000 San Francisco, San Mateo, and Marin county residents from all walks of life takes heart, grit, tenacity, creativity, dedication – and lots of help. We are 600 employees strong, providing foundational services to and advocating for the most vulnerable in our community. Last year we were joined by more than 4,000 volunteers who helped us bring dignity, hope, and resources to our clients: families, seniors, adults with disabilities, formerly homeless men and women living with HIV/AIDS, children and youth, and refugees and immigrants. Together, under the stewardship of our Board of Directors and with assistance of invaluable partners, we extended our reach, made a deep impact on our community, and empowered our neighbors.

It Takes A TEAM

75,804 hours served by volunteers
$2 million value of service hours
28 board of director members
The 2018 Strategic Plan is based on a wealth of feedback, perspective, and critiques from interviews, surveys, and insights with our key stakeholders – our Board of Directors, leaders, employees, donors, volunteers, and partners. Through our process, we distilled five key strategic priorities for the agency over the next five years:

- **Communicate our Brand, Vision, Leadership, and Advocacy**
- **Strengthen our Model for Sustainability**
- **Advance a Technology and Innovation Culture**
- ** Foster High Level, High Value Partnerships**
- **Leverage Outcomes and Impacts to Expand Continuous Improvements**
3,024

CLIENTS HOUSED AND SAFE
Catholic Charities plays a pivotal role keeping our communities diverse, productive, safe, and healthy through our proactive, wrap-around services. We are vital to San Francisco, San Mateo, and Marin counties, yet marginally understood and recognized for our contributions to the health and success of our communities. We will invest in long-term visibility and brand awareness to achieve greater impact, support financial sustainability, and more deeply engage our key stakeholders, clients, employees, current and potential funders, government agencies, current and future partners, and the communities we serve.

**STRATEGIC PRIORITIES INCLUDE:**

- Refine and execute our comprehensive strategic marketing plan with an emphasis on innovation to solidify and enhance our messaging and brand identity. The plan, based on industry best practices, includes advertising, public relations, social media, marketing automation, events, and crisis communications.

- Champion advocacy leadership surrounding social justice issues that resonate with our clients, employees, partners, funders, and community.

- Position Catholic Charities leaders as go-to topic experts on a regional and national level.

- Engage all employees and volunteers and inspire them to be committed brand ambassadors.
Catholic Charities reaches more than 35,000 individuals in need every year through a variety of funding sources that include City and Federal contracts and grants; foundation, family, and corporate grants; and bequests and individual gifts. We are a vital presence in human services in the communities we serve and a national model for human services throughout the United States according to the Council on Accreditation. We are strengthening our model for long term sustainability and growth to increase our impact, more efficiently and effectively assist struggling clients, and recruit and retain the highest caliber employees.

**STRENGTHEN OUR MODEL FOR SUSTAINABILITY**

**STRATEGIC PRIORITIES INCLUDE:**

- Develop a balanced operating and capital budget, assess financial risk, and proactively monitor financial performance.
- Create and implement a strategic development plan with goals, metrics, and desired outcomes based on solid portfolio management.
- Cultivate deep, synergistic corporate, governmental, philanthropic, and partner relationships.
- Develop employee retention strategies based on industry best practices to ensure stability and foster positive employee morale.
2,332
SENIORS AND ADULTS WITH DISABILITIES SERVED
100% of youth completed their homework on time during Catholic Charities after-school programming.
In order for Catholic Charities to continue its leadership in human services, we must embrace new technologies to deliver our services how and where people need them. We will champion a culture of innovation to benefit the agency, our work, clients, community, and bottom line.

**Strategic Priorities Include:**

- Connect with local and global technology corporations to invest human and/or financial capital.
- Develop a technology committee including members of the Catholic Charities Board and executive leadership, external technology companies, and corporate advisors.
- Assess agency infrastructure needs to make it easier to conduct business internally and externally, attract and retain staff, volunteers, and Board members, and provide transparency to clients and donors.
- Implement and maintain reliable, scalable technology infrastructure in support of the programs and services that deliver on our mission.
- Leverage technology to increase the efficiency of financial reporting within the agency.
Catholic Charities has built invaluable partnerships with cities, funders, corporations, foundations, parishes, and service providers. We will continue nurturing these relationships and establish new ones, defining our shared visions, values, goals, and measures of success to increase our impact and reach, enhance our reputation, and demonstrate commitment to our community.

**STRATEGIC PRIORITIES INCLUDE:**

- Champion creative partnerships and advocacy efforts that align with our mission.
- Initiate new and deepen existing partnerships, define shared visions/goals, and set expectations with these groups:
  - Business-based: chambers of commerce, foundations, technology innovators, and corporations
  - Community-based: local and national nonprofits, schools and educational institutions, service providers, and community organizing groups
  - Government-based: city, county, state, and federal bodies
  - Faith-based: Catholic parishes, the ecumenical community, and interfaith groups
- Leverage partnerships for mutual, reciprocal benefit, greater impact and influence, and long-term social change.
- Develop a partnership evaluation to assess effectiveness of collaborations and identify additional opportunities.
LEVERAGE OUTCOMES AND IMPACTS TO EMBRACE AND EXPAND CONTINUOUS IMPROVEMENTS

Catholic Charities is committed to continual improvement and learning. We regularly assess our performance and management processes to stay in the forefront of change and hold ourselves accountable for excellent client services. As a result of our dedication to learning and evolution, in 2017 we received accreditation from the Council on Accreditation and were called a national model for excellence in the delivery of human services.

STRATEGIC PRIORITIES INCLUDE:

• Identify quantitative and qualitative indicators, appropriate measurement tools, and performance targets to engage all stakeholders in continuous assessment and learning.

• Collect and monitor data on management and operational performance to: strengthen and build organizational capacity; measure progress toward achieving our strategic goals and objectives; evaluate operational functions that influence the capacity to deliver services; and mitigate risk.

• Assess staff training needs and promote staff competence through the investment in and provision of best practice trainings.
“Catholic Charities has been a godsend for my father. He loves the staff and support. If I had to rate the services and experience, I’d give them a 12 out of 10!”

Mother of a client participating in the Adult Day Services San Mateo County

“I’m thankful for Catholic Charities and the tangible and moral support. It has provided me with resources and the potential to see me as more than just undocumented. They believed in me and my dreams and helped me be where I am today.”

Former Canal Kids Club youth participant

“The consistent staff and strong educational foundation help push students to achieve more than they thought possible. I’m honored to be a member of this never-ending community.”

Refugee & Immigrant Services client
Vision without execution is just hallucination.

Thomas Edison
At Catholic Charities, we nurture a culture of continuous learning and improvement to advance the quality of our programs, make the best use of scarce resources, inform others of our advocacy, and improve the lives of the people in the communities we serve. Our core values of respect, compassion, and accountability lead us toward expectations of higher performance in all areas. Our performance quality improvement (PQI) system uses a plan, do, check, act (PDCA) model to continuously improve our services, program quality, impact, and strategic planning. We are committed to making decisions and achieving measurable results with verifiable data to see patterns, trends, performance over time, and benchmarks as tools for evaluating success. Our improvement plans, training, and clear policies and procedures help us build capacity, mitigate risk, and measure progress.
STRATEGIC ANALYSIS & PLANNING
Develop a strategic plan based on the analysis of the current environment, past performance, emerging priorities, and risks to achieve desired results.

OPERATIONAL PLANNING
Develop an operational plan identifying activities and resources to achieve delivery of targets and mitigate risk.

MONITORING & OVERSIGHT
Ongoing performance measurement of program and department activities to determine progress and achieve delivery targets.

PERIODIC ASSESSMENT
Periodic assessments (e.g., management reviews, audits, and evaluations) to explain deviations and allow for corrective action.

STRATEGIC ANALYSIS & PLANNING
Develop a strategic plan based on the analysis of the current environment, past performance, emerging priorities, and risks to achieve desired results.
Catholic Charities Programs & Services

10th & Mission Family Housing
Adult Day Services San Francisco
Adult Day Services San Mateo County
Aging Case Management
Assisted Housing & Health
Bayview Access Point
Boys' and Girls' Homes
Canal Family Support
CYO Athletics
CYO Camp
CYO Environmental Education
CYO Physical Education
CYO Transportation
Derek Silva Community
Edith Witt Senior Community
Hazel Betsey Community
Homelessness Prevention
Leland House
Maureen & Craig Sullivan Youth Services
OMI Senior Center
Peter Claver Community
Refugee & Immigrant Services
San Francisco
Refugee & Immigrant Services
San Mateo County
Rita da Cascia Community
SF Home
Star Community Home
St. Joseph’s Family Center
St. Vincent’s School for Boys
Treasure Island Child Development Center
Treasure Island Supportive Housing
Youth Club at St. Francis of Assisi

990 Eddy Street, San Francisco, CA 94109 | CatholicCharitiesSf.org