

CATHOLIC CHARITIES

CHERISHING THE DIVINE WITHIN ALL



Strategic Plan 2024-2026

Introduction

We arrive at this Strategic Plan at a momentous time for Catholic Charities. In the middle of our centennial year and at the end of the Greater Promise campaign, we have reflected on the extraordinary foundation – built over a century – that undergirds our work while also boldly envisioning new ways to reach and respond to our neighbors in need.

Over the past three years, our communities, our agency and our colleagues were tested by the seismic and devastating effects of a global pandemic. COVID-19 forced shifts in our focus and across our programs. It halted progress on key priorities and freshly exposed inequities across our region. But the pandemic also demonstrated the agility of our agency and the resilience of our clients and colleagues, and it introduced new ways of working that continue to inform our approaches.

This strategy draws from our history, our ambitions, and the lessons of recent years to connect our mission to with the day-to-day work of our programs. Framed broadly, it encourages our colleagues across Catholic Charities to consider how their efforts advance our overarching goals to provide care and services that improve the lives of Marylanders in need, in keeping with the gospel mandates to love, serve and teach.

My confidence in our ability to achieve the goals outlined in this strategy stems from a recognition of the talents, passion and determination of our colleagues. They are the driving force behind our work, and I am grateful for everything we will achieve together over the next three years.

Peace,

A handwritten signature in black ink that reads "Bill McCarthy". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Bill McCarthy



How we got here

The FY24-26 Strategic Plan is the result of a nearly year-long process of collaborative assessment, development and agency-wide reviews. The shared vision of those involved was to ensure there were no “wrong doors” for clients or stakeholders interested in engaging with Catholic Charities; to deepen the agency’s culture of hospitality; and to continue developing the most effective programs and fulfilled staff.

The Greater Promise strategic plan had emerged from a year-long effort that included high-level discovery sessions and an iterative development process led by three internal teams. The agency was beginning to finalize the plan in spring 2020 when COVID-19 upended the work. Agency leaders extended the planning process, and the Board of Trustees voted to approve the plan – with reflections and learnings from the early pandemic response incorporated – in summer 2020.

In summer 2022, the agency hired a new Chief Operating Officer and included oversight of the strategy within the position description. This structure helped streamline the strategic planning process, centering responsibilities more directly within one office and allowing the COO to define and steer the work.

ASSESSMENT

Catholic Charities began the strategic planning process shortly after the COO’s arrival with an assessment of our last plan. The Leadership and Planning Team and members of the Board of Trustees contributed to the assessment, considering where we excelled, where we fell short and where new interests or needs arose over the past three years.

Among the conclusions:

- The three strategic drivers in Greater Promise – adopted from the FY18-20 Strategic Plan – are still highly relevant.
- Several key goals have been accomplished and, even where work continues, no longer need to be considered strategic priorities.
- Several key goals are still in progress and remain strategic priorities for the agency, needing to be captured in the next strategy.
- Developing ways to measure outcomes is a priority for agency leaders, and processes need to be built into the next plan.

DEVELOPMENT

With this feedback and input from key stakeholders across the agency, the COO proposed five strategic goals aimed at capturing Catholic Charities’ overarching ambitions, needs and focus areas. Agency, divisional and departmental leaders weighed in, adjusting the goals to reflect the current and future-focused work of their programs. The agency tapped senior leaders to oversee each goal and began developing specific action plans and the dashboards necessary to track outcomes over time.

REVIEW

In the first half of 2023, the draft strategy underwent several rounds of review and revisions.

- In February, after additional review from the Leadership and Planning Committee, the Executive Committee of the Board of Directors weighed in on the evolving draft.
- In March, the agency posted the strategy to The Vine, put out a call for feedback and hosted a virtual discussion to walk through the draft and solicit questions and comments.
- Some feedback fell outside the realm of strategy, but provided interesting ideas related to programs or staff initiatives, or asked questions that could be answered directly. Other comments and edits were incorporated into the draft, such as underscoring the agency's trauma-informed approach to its work.
- In April, an agency town hall included an update on the plan and another invitation to provide feedback.
- In early May the Executive Committee of Catholic Charities' board reviewed and approved the updated strategic plan.

Though not part of the review, agency leaders also used May and June to finalize action plans, which will serve as the basis for assessing progress toward each goal. This included talking with programs about the data collection and reporting required and reconfiguring leadership committees and tools to make tracking easier.

FINAL APPROVAL

On May 25, 2023, the Catholic Charities Board of Trustees approved Strategic Plan FY24-26, which launched on July 1, 2024.

Goal One: Our Programs

STRATEGIC DRIVER: **Strengthen our programs and service delivery.**

GOAL:

Measurably expand and enhance the delivery of person-centered services to assist individuals, families and communities in achieving their greatest God-given potential, while striving to be the most effective human service provider in the region.

SUBGOALS:

1. Regularly assess standardized metrics across the agency – beginning in July 2023 – to track and assess outcomes in programs and operations.
2. Deepen internal and community-based partnerships throughout the region by launching a new agency-wide initiative, the Intergenerational Center in West Baltimore by fall 2024 and expanding our work in the Cherry Hill community, as well as other neighborhoods.
3. Improve overall experience of guests, clients, residents and participants in Catholic Charities programs to achieve better outcomes, ensuring a Trauma-Informed approach in all aspects of service delivery.
4. Expand discussions focused on diversity, equity and inclusion (DEI) and Trauma-Informed care across the agency and related trainings at all staff levels to underscore the importance of diversity, provide colleagues with a sense of belonging, and promote cultural competencies across all functions, programs and services.
5. Leverage more agile delivery models to increase use of person-centered, relationship-based, trauma-informed virtual offerings across the agency.



Goal Two: Workforce Development

STRATEGIC DRIVER: **Strengthen our programs and service delivery.**

GOAL:

Enhance the lives of our internal and external clients and colleagues by braiding existing workforce development activities with a larger agency-wide strategy to create career pathways and upskilling opportunities leading to family sustaining careers.

SUBGOALS:

1. Create synergy among programs with workforce development components to maximize impact.
2. Maximize funding opportunities for workforce development.
3. Enhance awareness and communications among internal and external stakeholders regarding workforce-development services.
4. Develop innovative career paths and educational opportunities for all who are seeking them.



Goal Three:

External Relations

STRATEGIC DRIVER:

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

GOAL:

Engage key stakeholders through more effective partnerships, communications, advocacy, education and outreach to parishes, volunteers, donors, colleagues and the public to ensure the mission and work of Catholic Charities is widely known and understood, and the resources needed to support our clients are abundant.

SUBGOALS:

1. Increase emphasis on stewardship activities targeting donors, volunteers and parishes.
2. Increase colleague participation in internal events and initiatives, with a particular focus on direct-care and new (<1 year) colleagues.
3. Increase participation of community partners (schools, individuals, community groups) in a spectrum of activities, including community-oriented events and initiatives.
4. Improve responsiveness to internal and external stakeholders and their resulting levels of satisfaction to build a culture of hospitality.



Goal Four:

Revenue and Efficiency

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

GOAL:

Expand agency revenue sources and leverage size and scale to improve operational efficiencies.

SUBGOALS:

1. Increase and diversify revenue sources to ensure abundant resources are available to serve clients.
2. Create a facilities department and evaluate capital projects and building management initiatives to align and streamline asset management.
3. Review all outsourced services and internal purchasing to maximize efficiencies.



Goal Five: Our Colleagues

STRATEGIC DRIVER:

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

GOAL:

Enhance the employee experience by supporting our colleagues holistically, advancing their skills and knowledge, providing leadership opportunities and maintaining a reputation as one of Baltimore's best places to work.

SUBGOALS:

1. Foster and grow a community of thoughtful, effective leaders across the agency.
2. Expand opportunities for internal career advancement.
3. Optimize the employee experience.



Participants in the planning process

MEMBERS OF CATHOLIC CHARITIES' BOARD OF TRUSTEES

Throughout the planning process, the Board Of Trustees' Executive Committee were involved in strategic planning update presentations in order to provide insight and feedback.

EXECUTIVE COMMITTEE

Archbishop William E. Lori, Chair
Theresa D. Becks, President
Tamla A. Olivier, Vice President
Pamela W. Gray, Treasurer
William J. McCarthy, Jr., Secretary
Michael Bison
M. Natalie McSherry, Esq.
Most Rev. Adam Parker
Dan Rizzo
John Stanton, Esq.
Marc Wyatt
David W. Kinkopf, Attorney
Sarah Beckwith, Staff
Ashley Valis, Staff

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 reviewing the strategic plan and creating the action plans to support its implementation.

EXTERNAL CONSULTANT

Hilary Roxe, Principal, Ellipsis Advisory

Our Mission

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

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

Our Values

To love, to serve, to teach, and
to work for justice.

Our Commitments

*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.



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