

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2021-2025**

MISSION	VISION	VALUES
<i>Serving people in need and creating hope in all stages of life.</i>	<i>A community of self-sufficient individuals, healthy in mind, body, and spirit.</i>	<i>Everything we do reflects God's love with faith, respect, service, and compassion.</i>

The 2021-2025 Strategic Plan below is comprised of five goals, each with measurable objectives. The specific strategies required to fulfill each objective are outlined in the appendix.

GOAL 1. OPTIMAL PROGRAMS/SERVICES - We will provide the optimal mix of programs and services delivered with maximum effectiveness and efficiency
Objective 1.1 Increased program/service effectiveness and efficiency
Objective 1.2 Explore referral agreement with other social service agencies offering housing services to address affordable housing and hunger issues
GOAL 2. PHILANTHROPIC ORGANIZATION OF CHOICE – We will attract increased financial support to ensure most vulnerable needs are met and donors are satisfied with their investment.
Objective 2.1 Increased alignment with donors’ interests to drive increased support and donor satisfaction
Objective 2.2 Increased donor appreciation to drive retention and increased gifts
Objective 2.3 Increased funding to address program needs and specific opportunities to improve impact
GOAL 3. AMPLIFIED BRAND AWARENESS – We will be well known throughout our service area for the quality of our programs and services.
Objective 3.1 Increased awareness by building upon Catholic Charities’ brand image, positioning, and messaging to drive donations/funding, program referrals and participation.
Objective 3.2 Increased targeted marketing communications to key stakeholder groups to drive donations/funding, program referrals, and program participation
GOAL 4. BEST IN CLASS GOVERNANCE - We will govern Catholic Charities, in accordance with its defined mission, values and vision for the future, using best practices of board governance.
Objective 4.1 Strengthened governance & enhanced board performance through engagement, evaluation, and education
Objective 4.2 A Ensure our BOD meets COA standards & includes representatives from all counties with a focus on expanding diversity as appropriate to understand the client experience.
Objective 4.3 Enhanced committee structures and volunteer roles in support of the strategic plan
Objective 4.4 Expanded programmatic advisory councils to aid in expanding awareness, advocacy, resources, diversity and inclusion

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GOAL 5. BEST PLACE TO WORK - We will manage Catholic Charities using the highest and best practices of nonprofit management
Objective 5.1 Increased staff capacities/opportunities that lead to increased job satisfaction, retention, and promotion from within
Objective 5.2 Develop clearly defined job descriptions and salary ranges
Objective 5.3 Develop and routinely update career/professional development plans for all employees based upon needs and desires for training
Objective 5.4 Link leadership succession plans, with professional development to ensure named employees are prepared for long term success
Objective 5.5 Increased and improved internal communications
Objective 5.6 Increased use of technology for improved workforce efficiency and decreased workload

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APPENDIX – DETAILED STRATEGIES

GOAL 1. Optimal Programs/Services. We will provide the optimal mix of programs and services delivered with maximum effectiveness and efficiency.

Objective 1.1: Increased Program/Service effectiveness and efficiency

Strategies <i>(Specific steps to work toward objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Conduct annual program evaluation to analyze program performance and financial data and brainstorm how to move from good to great; engage outside consultants when necessary and/or prudent	Gathering of performance Data Comparative review of data over time/trends Develop action plans for improvements needed and ways to move from good to great	Mark Eidemueller	Program Development & Quality Director Program and Ministry Directors Operations Director Finance Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	In-depth evaluations completed annually for all programs Action plans translated to annual plan Success indicators = Increases in clients served and/or clear efficiency improvements	None	NA
Measure program and department performance through consistent dashboard/key performance indicators	Identification of key performance measures for each program/ministry/dept. Standardized measurement tools to measure client progress/successes	Mark Eidenmueller	PQI Department/ Program Development & Quality Director Program and Ministry Directors Operations Director	Quarterly	Update dashboards quarterly Present results in quarterly PQI Report and to PQI Committee Success = dashboard show consistent success with key performance indicators	None	NA
Conduct quarterly Performance & Quality Improvement Committee Meetings and Quarterly PQI Report	Routine gathering of program/dept./org performance data Presentation of data to committee to identify strengths and weaknesses	Board Champion to participate on quarterly meetings	Program Development & Quality Director	Quarterly	Meeting agenda/minutes reflect routine review of program/dept./organizational performance data, and actions taken on improvement identified.	None	NA

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Objective 1.2: Explore referral agreements with other social service agencies offering housing services to address affordable housing and hunger issues

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Meetings, collaborations, are held to determine opportunities for CC referrals to address client affordable housing and hunger issues.	Identification of potential referral sources		CEO Program Development and Quality Director Operations Director	End of 2022	Number of referrals/needs met	TBD	TBD

GOAL 2. Philanthropic Organization of Choice. We will attract increased financial support to ensure the most vulnerable needs are met and donors are satisfied with their investment

Objective 2.1: Increased alignment with donors' interests to drive increased support and donor satisfaction

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Develop annual campaign Compelling Case Recruit Annual Campaign Chairs	Develop the plan and cultivate leadership to obtain endorsement. Case approved, plan written, endorsed, and executed. Committee formed.	Pending the new Development Committee Chair.	Development Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Annual campaign financial goal attained. Overall goals is \$3.5 million for FY 21-22, \$2.8 of which will be major gifts. This does not include all the revenues in the budget.	\$567,000 2021-22 budget for Fundraising and Appeals	Individuals Foundations Corporations

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Objective 2.2: Increased donor appreciation to drive retention and increased gifts

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Cultivation events, newsletters, and stewardship visits	Accurate donor lists and newsletters / communication strategy to donors	Pending the new Development Committee Chair. Marietta McNulty	Development Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Donors feel appreciated as evidenced by donor retention and an increase in individual gifts. Determine and track increase in retention rates.	0	NA

Objective 2.3: Increased funding to address program needs and specific opportunities to improve impact

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Develop/implement Major Gifts Program	Develop Update annually Implement Track success	Pending the new Development Committee Chair	Development Director	FY start 2021-22 (October) FY start 2022-23 FY start 2023-24 FY start 2024-25	Annual Major Gifts Financial goal (\$2.8 million as part of the annual 2021-22 campaign) achieved and other major gifts metrics	\$567,000 2021-22 budget for Fundraising and Appeals	Included in Development Department Budget

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Develop Annual Campaign	Develop Update annually Implement Track Success	Pending the new Development Committee Chair.	Development Director	FY start 2021-22 (October) FY start 2022-23 FY start 2023-24 FY start 2024-25	Annual Plan Financial goal (\$3.5 million for 2021-22) achieved and other annual plan metrics	\$567,000 2021-22 budget for Fundraising and Appeals	Included in Development Department Budget
Develop/implement Planned Giving Program	Develop Update annually Implement Track Success	Pending the new Development Committee Chair.	Development Director	FY start 2021-22 (October) FY start 2022-23 FY start 2023-24 FY start 2024-25	Develop a goal for # of estate planning presentations annually 1 estate planning seminar 2 targeted mailings 2-10 active meetings per month with planned giving prospects 5 individuals naming Catholic Charities in their estate (will, insurance policy, charitable gift annuity, etc)	\$567,000 2021-22 budget for Fundraising and Appeals	Included in Development Department Budget
Research Capital Campaign and perform feasibility study	Conduct research Conduct feasibility study	Pending the new Development Committee Chair.	Development Director	3rd Qtr FY 2021-22	Study complete	\$567,000 2021-22 budget for Fundraising and Appeals	Included in Development Department Budget
Implement Grant Funding Program	Determine specific funding needs by program Research and apply to opportunities	Pending the new Development Committee Chair.	Development Director Grant Writer Program Directors	Contingent on grantor timelines	Successful grant completion and reporting in accordance with grant funding plan. Annual financial goal (2021-22 \$1M +) for grant funding.	\$567,000 2021-22 budget for Fundraising and Appeals	Included in Development Department Budget

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GOAL 3. Amplified Brand Awareness. We will be well known throughout our service area for the quality of our programs and services.

Objective 3.1: Increased awareness by building upon Catholic Charities' brand image, positioning, and messaging to drive donations/funding, and program referrals and participation

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Develop a comprehensive communications strategy that considers key events throughout the year such as World Refugee Day and other relevant established months/days	Written plan/calendar Update annually	Terry Murphy, Marketing Committee Chair	Assoc. Development Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Following the schedule and plan. Success evidenced by an increase in website, social media visits, and print media.	Marketing/ Advertising budget for FY22 \$30,000. This is for all activities.	NA

Objective 3.2: Increased targeted marketing communications to key stakeholder groups to drive donations/funding, program referrals, and program participation

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Recruit/maintain Parish Ambassadors involvement in 80% of parishes	Marketing materials Measuring impact (referrals made)		Operations Director Parish Social Ministry Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Parish Ambassadors make increasing connections to CC in the form of referring clients for services, volunteers, involvement in program advisory boards. Training in program services occurs for each new ambassador and refresher annually.	Cost of marketing materials.	Marketing budget.

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CEO speaks at 12 parishes annually to drive program referrals, volunteers, and program participation	Communication with parishes/ambassadors Scheduling of events		CEO Parish Social Ministry	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	CEO speaks at 12 parishes annually, 1 per month.	None	NA
Marketing projects that drive donations such as newsletters, annual report, and appeal letters.	Draft materials Send/distribute materials Track associated donations	Terry Murphy, Marketing Committee Chair	Assoc. Development Director	Per project Quarterly newsletters Annual Reports Calendar Year End	Success evidenced by donations associated with various projects.	None	NA

GOAL 4. "BEST IN CLASS" GOVERNANCE – We will govern Catholic Charities in accordance with its defined mission, values, and vision for the future, using best practices of board governance.

Objective 4.1: Strengthened governance & enhanced board performance through engagement, evaluation, and education

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Conduct a board orientation refresher annually to include a review of BOD job description and tour of facilities	PowerPoint Presentation Board Materials Board Intranet Committee Assignments	Marietta McNulty, Board President	CEO	FY end 2020-21 FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Annual board orientation to provide understanding of board members' role in policy vs. operations and fundraising	None	NA
Conduct an Annual Board Self Evaluation	Evaluation template/survey Compile survey results Share results with BOD Take action based on results		CEO – send board evaluation through survey monkey annually, monitor completion – ensure 80% completion	FY end 2020-21 FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Board evaluation is completed annually, and an action plan developed/implemented based on results.	None	NA

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Engage BOD with Program Directors through invitations to attend each regular board meeting to offer context on challenges vs a presentation.	Agenda planning for quarterly board meetings Preparation/review of program SWOT prior to board meeting		CEO Program Development & Quality Director Operations Director Finance Director	FY end 2020-21 FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Program Directors attend board and/or committee meetings at least 2x per year to discuss and brainstorm program strengths, opportunities, threats, and weaknesses.	None	NA
Develop an intranet for Board Members to access all board related materials	Cloud-based technology products		Data and Program Support Manager Diocese IT	FY end 2022-23	Review of intranet options/design Present recommendations to BOD Select intranet platform and set up Provide Board Orientation in use Include instructions in board manual	Potential Cost TBD	Capacity Building Grant Opportunity
Develop a governance committee to update board manual, Review and update annually as needed – to include addition of humble monetary ask of annual, meaningful contribution from BOD members depending on ability to give.	Review manual for items listed in key success indicators Draft items missing Add to manual Update roster and schedule of meetings annually.	Marietta McNulty, Board President, R. Diaz, W. Shannon, CEO and Terry Murphy	CEO Program Development & Quality Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Board manual updated to ensure inclusion of updated articles of incorporation, bylaws, D&O policy highlights, organization history, membership roster, schedule of meetings, board member job description and expectations, copy of strategic plan, key metrics and milestones.	None	NA
Develop/implement procedure for annual evaluation of CEO with staff/stakeholder feedback, and approval of compensation.	Draft evaluation process to include research industry standards for CEO salary, feedback, BOD approve, add to manual		HR Manager	FY end 2022-23 Ongoing annually	Procedure written and approved to include gathering of feedback from internal and external stakeholders and research of compensation norms of organizations of similar size and budget.	None	NA

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Objective 4.2: Ensure our BOD meets COA standards and includes representatives from all counties with a focus on expanding diversity as appropriate to understand the client experience.

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Develop a matrix of board skills/talents to ensure board reflects the diversity, ethnicity, educational, and circumstances of the community served As required by COA	Develop template of board matrix Create survey to gather BOD member details Present results Identify characteristics needed in new board members	Bill Shannon, Nominating Committee Chair Terry Murphy	Program Development & Quality Director– Develop matrix and survey CEO – Approve matrix and ensure completion BOD – complete survey	Develop/ Approve matrix by FY end 2021-22 Complete matrix and present to BOD by FY end 2022-23	Develop matrix template Develop survey to gather information needed for matrix Complete matrix and present to Personnel Committee/BOD Identify areas of skills/talents/experiences needed to strengthen board	None	NA
Recruit new board members based on needs identified in matrix	BOD to Identify prospective new members Make inquiries with prospective new members Schedule meetings with prospective new members Onboard new BOD members	Bill Shannon, Nominating Committee Chair Terry Murphy	CEO and Board President conduct new board member orientations	FY end 2023-24	New board members onboarded that meet diversity/client experience needs identified in matrix Former clients onboarded advisory boards for potential succession	None	NA

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Objective 4.3: Enhanced committee structures and volunteer roles in support of the strategic plan

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
All board members to actively participate on a board committee	List of standing committees and program advisory boards Each board committee develops/reviews the role of committee/members as outlined in Bylaws	Marietta McNulty, Board President	CEO	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Determine committees needed above and beyond standing committees listed in manual - Track/ensure board participation on committees and review annually Discuss in annual orientation refresher	None	NA

Objective 4.4: Expanded programmatic advisory councils to aid in expanding awareness, advocacy, resources, diversity and inclusion

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Repurpose and improve advisory board membership/operations for those that already exist	Develop list of prospective new members Advisory Board roster/contact list advisory board manual member recruitment materials meeting agendas/minutes matrix of member skills/talents	Catalina Pines	Operations Director Program Development & Quality Director Program Directors (Elder Affairs, Birthline, Samaritan Center, Interfaith Health & Wellness, Respite)	Revisions to materials by FY end 2021-22 Restructure as needed by FY end 2022-23 Recruit new members by FY end 2023-24	Brainstorm with Program Directors best structure, use of advisory board/membership talent/experience needs. Revise manual as needed/develop recruitment materials, Recruit new members, Introduce new structure/manual, Hold quarterly meetings	Potential costs for marketing materials Food/ refreshments at meetings	Program budgets Underwriting of marketing materials Volunteers to arrange meeting refreshments

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Develop advisory boards for programs that don't have one	Develop list of prospective members Advisory Board roster/contact list advisory board manual/bylaws member recruitment materials meeting Agendas/minutes	Catalina Pines	Operations Director Program Development & Quality Director Program Directors (Bakhita Empowerment, Counseling/Mental Health, Immigration, HHO)	Develop manual/recruitment materials by FY end 2021-22 Recruit Members by FY end 2022-23 Hold quarterly meetings by FY end 2023-24	Brainstorm with Program Directors best structure use of advisory board/membership talent/experience needs develop manual/recruitment materials by FY end 2021-22 Recruit members by FY end 2022-23 Hold quarterly meetings by FY end 2023-24	Potential costs for marketing materials Food/refreshments at meetings	Program budgets Underwriting of marketing materials Volunteers to arrange meeting refreshments
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GOAL 5. "Best Place to Work" We will manage Catholic Charities using highest and best practices of nonprofit management

Objective 5.1: Increased staff capacities/opportunities that lead to increased job satisfaction, retention, and promotion from within

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Staff in leadership positions/directors (to include CEO) complete Intensive Leadership Training	List of prospective vendors Vendor proposals/quotes Secure funding Scheduling Tracking of completion		HR Manager Review prospective vendors Secure funding Select vendor/hire Schedule training	Select Vendor FY end 2021-22 Secure funding FY end 2022-23 Conduct training FY end 2023-24	Staff completion of training Success evidenced by implementation of lessons learned Leadership roles to be offered only to those completing specific training geared toward attaining higher positions.	\$30,000	Capacity Building Grants

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Routine supervision meetings are conducted with all employees Per COA requirement	Scheduling Documentation/tracking of supervision Training/education re how to conduct effective supervision meetings – giving constructive feedback		HR Manager All Supervisors All Directors	Annual tracking of level of supervision provided to all employees FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	All employees have a min. of 1x per month supervision meeting, more often for new and or employees with performance concerns (COA requirement). Monitoring/tracking occurs annually to ensure this level of supervision is happening and if not, this is corrected/addressed with supervisor/informs appraisal. Success measured by improvement in employee satisfaction survey scores.	None	NA
Complete a training needs assessment and training plan for the organization and specific programs annually per COA requirement	Assessment/identification of training needs for all staff/programs Distribute to all Training completion tracking by employee		HR Manager	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Complete/update training plan for each FY by the end of the previous FY Distribute to all staff/Directors Routinely update/monitor completion of staff training	Possible costs	HR budget Program budgets
Improve, revise, and automate performance appraisal reviews	Research/evaluate various best practice templates Customize a template that fits our organization Automate it Begin implementation Gather feedback and adjust accordingly	Mark Eidemueller, Personnel Committee Chair	CEO HR Manager	Research best practices FY end 2021-22 Customize new template FY end 2023-24 Automate and begin using new template FY end 2024-25	New revised performance appraisal form Automate new form Begin using/gather feedback Make adjustments based on feedback This may be included in a new HR management system outlined in Objective 2.7	None	NA

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Explore offering tuition assistance to staff enrolled in higher education	Estimate cost Identify revenue Develop protocols/plan Implement		CEO HR Manager Finance Director	FY end 2023-24	Evidence of efforts to identify revenue and develop protocols	\$7500 Annually (\$1500 per employee max per year X approx. 5 employees)	Capacity building grants
Implement employee recognition program a minimum of quarterly	Instructions shared routinely on how to/criteria to nominate Prompt nominations when none are received Plan recognition activity		HR Manager Operations Director Program Development & Quality Director	Every Quarter	An employee is awarded “Employee of the Quarter”, Marketing/communication of this achievement is complete (Photo, Facebook, email, etc.).	None	NA

Objective 5.2: Improved job descriptions and accompanying increased salary ranges competitive in the marketplace

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Clearly define/revise job descriptions and salary ranges for each position	Consultation with Program Directors	Mark Eidemueller, Personnel Committee Chair	HR Manager CEO	½ completed by FY end 2022-23 All Positions by FY end 2023-24	Job descriptions updated and approved by HR/CEO.	Possible costs if we decide to hire consultants to assist	Capacity building grants
Develop compensation scales for all positions	Industry/market research	Vito Gendusa, Finance Committee Chair	HR Manager CEO Finance Director	FY end 2023-24	Compensation scales developed for all positions	None	NA
Implement merit-based salary increases	Build into budget for FY 2024-25		HR Manager CEO Finance Director	FY end 2024-25	Merit based salary increases implemented in addition to COL.	The cost will be determined by the total company allowed increase	Board donations

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Objective 5.3: Develop and routinely update career/professional development plans for all employees based upon needs and desires for training

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Complete and update career/professional development plans for all FT employees annually	Update plans annually at time of performance review meeting Review plans at mid-year point for progress made/lack thereof Create opportunities (training, mentoring, job shadowing, etc. for skill building as outlined in plan)		HR Manager	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Develop plans annually, with mid-year review/updates occurring during supervision meetings. These may be included in the new HR management system outlined in Objective 5.7	None	NA

Objective 5.4: Link leadership succession plan, with professional development to ensure named employees are prepared for long-term success

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Complete/annually update succession plan for top leadership positions per COA requirement	Review of performance appraisals Identification of top performers with succession aspirations	Mark Eidemueller, Personnel Committee Chair	HR Manager CEO	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Succession plans updated annually Ensure career/professional development plans for named employees align with succession plan	Potential costs for training/professional development	HR Budget

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Objective 5.5: Increased and improved internal communications

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Utilize CQI teams to prompt employees to work with colleagues from other depts./programs/locations in areas designed to impact the entire organization i.e. training, employee engagement, emergency response, etc.	Re-establish teams & team membership annually Team instructions Election of team lead, coordinator, secretary Build in incentive for participation/taking on lead roles Post updates		Program Development & Quality Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	New team commitments annually for all FT employees Teams meet quarterly Teams select a project(s) and complete the project Staff complete an evaluation of their team’s performance annually Successful CQI projects that impact the organization positively.	Potential costs for some CQI team projects, i.e. employee engagement may involve luncheon/food Helium tank costs	TBD
Develop “all staff” messages min. every other month from CEO updating on organizational activities (as outlined in board management report) Consistent campaign to reinforce message.	Draft message Review/Send		CEO Assoc. Development Director Program Development & Quality Director	6 per year Every other month	Send 6 monthly messages per year to all staff to update on organizational activities. Some messages may include a video message. Evidence of success = improved scores in staff satisfaction surveys.	None	NA

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Communication campaign to promote engagement and to motivate movement from Good to Great	Develop campaign plan Screen saver message Posters Signature lines Weekly email blast Reward employees with good ideas Committee to review ideas	Terry Murphy	Program Development & Quality Director Assist. Development Director	FY end 2021-22 FY end 2022-23 FY end 2023-24 FY end 2024-25	Successful implementation of annual Good to Great Communication Plan and marked improvement of staff satisfaction surveys	Possible costs for incentives	NA
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Objective 5.6: Increased use of technology for improved workforce efficiency and decreased workloads

Strategies <i>(Specific steps to work towards objective)</i>	Requirements for Completion <i>(Resources, materials, etc. required to fulfill the strategy)</i>	Board Champion <i>(Board Member and responsibilities)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Completion Date <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>	Estimated Budget <i>(Total estimated cost for the strategy for each year of implementation)</i>	Funding Sources <i>(Sources of revenue for this work)</i>
Utilize a Human Resource Management System	Research/select vendor Train and learn how to use it Enter data and utilize		HR Manager	Select Vendor FY end 2021-22 Begin Use/train FY end 2022-23	Research vendors/select Purchase system Train and learn how to use it. Utilize effectively	\$5,000 to \$7,000 Annually	Capacity building grant
Donor Management System is up to date, managed, and working effectively	Ensure data in system is correct/clean/accurate Make corrections/additions Bring in a trainer once a year for Development Staff to have a refresher on the system and if there were upgrades to the system to increase efficiency		Development Director Asst. Development Dir.	FY end 2021-22 FY end 2022-23	The ability to send a mailing to all donors without exception by FY end 2021-22. Having email addresses for all donors by FY end 2022-23.	Annual cost of Salsa is \$7500 plus cost for onsite staff training	Development Budget

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Consolidate Counseling electronic health record systems, and manage effectively	Use one system Migrate all information into selected system Design/use needed reports Connect to billing		Operations Director Clinical Director	Research options/select best option by FY end 2021-22 Consolidate to one system FY end 2022-23	Research options Select best option Consolidate to one system Training in use/reporting	Annual Cost for AdvancedMD \$11,000 in FY21 Annual Cost for Therapy Notes— approx. \$2,200/yr	Included in Counseling budget
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