



**CATHOLIC
CHARITIES**
SERVING NEIGHBORS IN NEED



Together for *Charity*



Strategic Plan 2022

Overview

Inspired by Christ's call to serve, the mission of Catholic Charities is to provide service to those in need, to advocate for justice, and to call upon others to do the same. We minister to those in need and are bound and fashioned by the teachings of the Catholic Church. We believe in the dignity of every person, that each one of us has worth and is deserving of care and respect. We believe in a preferential option for the poor, in creating space and services for those most often voiceless and unseen. And we believe in solidarity, that we are one human family with the responsibility to work for the common good. Our priority is to serve families and individuals impacted by poverty, to serve those whom others do not and not duplicate services that are meeting community needs. In that spirit of service, the Board of Directors and the Staff of Catholic Charities of the Archdiocese of Milwaukee has engaged in a strategic planning process to guide the coming three to five years and ensure financial stability as the need for our services grows.

Why Now?

The Covid-19 pandemic reaffirmed the identity of Catholic Charities as an agency that prioritizes the needs of the most vulnerable above all else. The compassionate culture and leadership that allowed staff at all levels to make necessary decisions enabled the agency to adapt to the ever-changing conditions of the pandemic. When other agencies transitioned to virtual-only services, Catholic Charities continued to offer in-person services as well as providing virtual assistance. Our services will continue to be vital for the less fortunate among us, as it has been for over one hundred years.

As the Archdiocese of Milwaukee prepares for a transition in leadership, the vision and purpose of Catholic Charities, as well as its support of the Archdiocesan mission of serving the less fortunate, remain constant. With this in mind, we created the Strategic Plan as a way to achieve future goals and stay consistent with our vision of improving the lives of those we serve, empowering the most vulnerable and helping to reduce poverty through quality compassionate, and effective human services.

In recent years, Catholic Charities supporters have made significant contributions. In addition, the future prospect of funds from the Archdiocese "Love One Another" campaign creates an opportunity to invest in programs and services, capital improvements, and long-term sustainability. While

raising funds to advance the mission is an ever-present need, we must prepare for the just and prudent stewardship of these financial resources.

This is a moment when people of faith live and lead by example like the Good Shepherd, who tells us, "*I came that they may have life, and have it more abundantly.*" John 10:10. This Strategic Plan moves the mission of Catholic Charities forward in light of the needs of the community. That overwhelming need compels us to take a **leap of faith** and be ambitious in our reach and trusting in our future that we all might live a life more abundantly.

The Process

For a number of years, the idea of strategic planning had been identified on board surveys as something that the organization should undertake. Thus, an Ad Hoc Strategic Planning Committee was formed. It included numerous Board and Staff members who met multiple times throughout the winter and spring of 2022. During this time, members identified three pillars on which to focus the Strategic Plan. The process culminated in a Strategic Planning retreat with the Board of Directors, Fr. David Reith, and key Staff in June of 2022.

The Strategic Plan & Goal Pillars

The Strategic Plan is intended to focus on the direction of the Agency in the next three to five years, as we navigate the best way to carry out our mission while ensuring growth and sustainability.

The plan is anchored by the three Goal Pillars, each of which have a number of strategic initiatives. It is our intention to view this plan as a living document that will be reviewed, assessed, and modified in the years to come as the needs of the community evolve.

Above all, Catholic Charities is a mission-driven organization guided by the grace of God and Christ's call to serve. We would like to thank all those who have participated in this process to help guide the future of Catholic Charities.

ARCHBISHOP JEROME LISTECKI

Archbishop of Milwaukee and
President, Board of Trustees

VERY REVEREND DAVID REITH

Vicar for Catholic Charities

MICHAEL BLOEDORN

First Vice President
and Chairman

JACK HERBERT

Second Vice President
Vice Chairman

RICARDO CISNEROS

Chief Operating Officer

THE STRATEGIC PLAN GOAL PILLARS

LIVING OUR MISSION

Define the Focus of Mission-Driven Activities of Catholic Charities for the Next 3-5 Years

ORGANIZATIONAL PREPAREDNESS

Ensure That Catholic Charities Has a Vibrant Organization in Place to Achieve the Strategic Plan and Its Future Goals

FINANCIAL SUSTAINABILITY

Create a Funding Model That Will Ensure Long-Term Financial Sustainability



PILLAR I - LIVING OUR MISSION

Define the Focus of Mission-Driven Activities of Catholic Charities for the Next 3-5 Years

PRIORITY 1 – PROVIDE SERVICE FOR THOSE IN NEED

Focus on the mental health and holistic service models to meet the needs of the community.

Goal #1: Prioritize case management and mental health services while continuing to provide the other core services.

- > Continue providing mental health and case management services, which were consistently ranked among top priorities by local communities, parishes, and the Archdiocese.
- > Add culturally competent therapists and case managers where current needs are unmet, as opportunity presents.

Goal #2: Develop holistic, professional strategies to further our reach and provide more options for mental health services.

- > Create grieving groups such as those established at St. Camillus and the Catholic Home during the Covid-19 pandemic as well as other group therapy opportunities.

Goal #3: To maximize the use of community resources, utilize case managers to help families and individuals navigate the complexity of access to care.

- > Take advantage of current partnership and network opportunities, such as IMPACT 211 and similar referral systems.

PRIORITY 2 – ADVOCATE FOR JUSTICE

Acknowledge that race and poverty have a strong correlation and therefore continue to foster relationships with minority groups, with a special attention to African American communities.

Goal #1: Continue to prioritize hiring of culturally competent Staff, including those who are bilingual, to meet the needs of the population we serve.

Goal #2: Collaborate with other groups to identify the needs of the African American community.

- > Create an advisory group of Board and community members to make recommendations and guide the expansion of services and collaborations within the African American community.
- > Guided by the advisory group, design culturally appropriate services focused on underserved areas and provided by culturally competent staff.

PRIORITY 3 – CALL UPON OTHERS TO SERVE

Grow collaboration and partnerships with parishes, community partners and volunteers to expand the reach of our services.

Goal #1: Expand the reach of Catholic Charities by fostering closer ties with parishes, volunteers and other organizations that serve our client base.

- > Invite these groups to participate in the shared mission and vision of cooperation in order to address the needs of the community.
- > Expand volunteer base, specifically targeting millennials and Gen Z, by creating experiential, transformational opportunities, which often lead to long-term support.

Goal #2: Continue to partner with similar social service agencies while continuing core services.

- > Further relationships and establish partnerships with other organizations and complement services that other groups offer.



PILLAR II - ORGANIZATIONAL PREPAREDNESS

Ensure That Catholic Charities Has a Vibrant Organization in Place to Achieve the Strategic Plan and Its Future Goals

PRIORITY 1 – INVEST IN AGENCY STAFF

Focus on retaining and mentoring the quality staff we currently have; recruiting high-quality staff in a competitive talent landscape; and engaging in succession planning. Maintain a high level of awareness, flexibility, and collaboration within the management team.

Goal #1: Invest in current staff.

- > Continue to provide staff with generous benefits package and workplace flexibility in order to sustain a client-focused culture.
- > Evaluate staff training, communication, and development to ensure a high level of quality service and engagement.
- > Perform regular evaluations of compensation and benefit trends across local markets to remain competitive.
- > Develop succession plans for key positions including mentorship, education, and leadership training.
- > Continue effective communication and staff engagement activities that have been successful.

Goal #2: Recruit candidates aligned with our mission and values.

- > Leverage the mission and culture of Catholic Charities as a recruitment strategy.
- > Work with Finance Committee to ensure continued support of investment in resources and sustainability of compensation increases.

Goal #3: Add staff in key areas.

- > Continue successful recruitment of culturally competent staff.
- > Pursue opportunities to increase staff in support of priorities outlined in the Living Our Mission pillar.
- > Consider adding contractors in key areas (e.g., marketing, social media, advancement, grant writing).

PRIORITY 2 – GOVERNANCE & ORGANIZATIONAL STRUCTURE

Evaluate the current Board and staff governance structure to best align in support of the Agency and creating a path for the future.

Goal #1: Renew Board structure to revitalize a robust orientation for new members.

- > Include ongoing diversity and inclusion training and education on needs of people affected by poverty.

Goal #2: Assess current Board structure (number of members, term length, leadership, committees, etc.).

Goal #3: Foster opportunities between Board and staff to achieve closer knit organization.

- > Increase opportunities for Board members to engage with staff and programs.

Goal #4: Begin succession planning process.

- > Provide Archbishop ListECKI with an opportunity to contribute his vision for Catholic Charities.
- > Assist in transition of that vision between Archbishop ListECKI and new Archbishop.

Goal #5: Provide Board member orientation, training, education, and Trustee Manual.

PRIORITY 3 – INVEST IN AGENCY FACILITIES AND TECHNOLOGY

Provide service with dignity and respect to include welcoming, client-centered spaces in both physical and virtual environments.

Goal #1: Examine internal and external environments from a client-centered perspective.

Goal #2: Revise capital budget to include aesthetic, structural, and branding updates and repairs recommended at all area offices.

- > Implement a plan to finance and complete maintenance and improvement projects.

Goal #3: Develop a technology replacement strategy to support the ongoing technological needs of the agency.

- > Perform a regular evaluation of technological needs.
- > Incorporate the replacement strategy into the annual budget.



PILLAR III - FINANCIAL SUSTAINABILITY

Create a Funding Model That Will Ensure Long-Term Financial Sustainability for the Agency's Future

PRIORITY 1 – ENHANCE DONOR RELATIONS TO INSPIRE INCREASED PHILANTHROPY

Create more sustainability in fundraising streams by engaging and cultivating current and potential donors

Goal #1: Measure and develop a strategy to grow planned giving, major gifts, unrestricted/annual gifts, and endowment funds.

- > Determine goals based on the fundraising history and development strategy.
- > Continue to provide KPI reports to Advancement Committee and determine patterns and necessary adjustments.

Goal #2: Continue current marketing and donor communication practices.

- > Utilize brand discovery project (2018) guidelines to continue communication and branding efforts.
- > Maintain donor experience to ensure personalization, quality, and efficiency with every gift.

Goal #3: Engage with donors to align passion and interest with mission and programs.

PRIORITY 2 – INVEST IN RESOURCES AND TECHNOLOGY TO SUPPORT FUNDRAISING INITIATIVES

Identify key areas for investment in resources and technology.

Goal #1: Invest in staff to support the fundraising goals.

- > Continue staff education in philanthropic psychology, donor relations software and data analysis.
- > Continue pursuit of additional support staff as needed and as finances support.

Goal #2: Leverage technology to support the fundraising goals.

- > Evaluate need for FTE to monitor and support upgrades in technology that improve the donor experience.
- > Increase cutting-edge fundraising techniques; invest in social media/digital platforms, website, e-mail comms, online donations.

PRIORITY 3 – CREATE FUTURE-FOCUSED FINANCIAL MODELS

Create budget based on assessment of prior year contributions and a good faith estimate of future contributions.

Goal #1: Create a multi-year financial forecast to be reviewed during the annual budget process.

Goal #2: Develop policies and procedures to address the allocation of large, unrestricted gifts or bequests.

Goal #3: Create a five-year budget estimating the impact and use of funds generated from Archdiocesan “Love One Another” Campaign.

STRATEGIC PLANNING COMMITTEE

Michael Bloedorn
Chair, Board of Trustees

Jack Herbert
*Ad Hoc Strategic Planning
Committee Chair*

Father David Reith
Vicar

Mike Laszkiewicz
Living Our Mission Chair

Nicole Schmidt
Organizational Preparedness Chair

Jerry Voors
Financial Sustainability Chair

Patty Dowd Schmitz
Consultant

Nate Braun
Joe Carlson
Ricardo Cisneros
**Shawnee Daniels-
Sykes, PhD**
Brandi Ellis

John Kinsella
Susan McNeil
Pamela Owens
Jackie Rekowski
Colleen Schmidt
Dr. Julie Schuller

AGENCY LEADERSHIP

Officers of the Board

Archbishop Jerome ListECKI
President, Board of Trustees

Bishop Jeffrey Haines
Archbishop's Representative in his absence

Michael Bloedorn
First Vice President and Chairman

Jack Herbert
Second Vice President & Vice Chairman

Dr. Julie Schuller
*Secretary and Board Governance
Committee Chairwoman*

John McGee
*Treasurer and Finance Committee
Chairman*

Members of the Board

Michael Adams
Keith Baisden
Vince Beres
Father Juan Manuel Camacho
Angela Cunningham

Shawnee Daniels-Sykes, PhD

Mike Laszkiewicz
Nicole Schmidt
Jerry Voors
Father Matthew Widder

Agency Leadership

Father David Reith
Vicar for Catholic Charities

Ricardo Cisneros
Chief Operating Officer

Colleen Schmidt
Executive Assistant

Brandi Ellis
Director of Finance and Accounting

Jackie Rekowski
Director of Advancement

Nate Braun
Director of Human Resources

Robert Kaisler
*Director of Quality Assurance and
Facilities*

Program Contacts

Annette Jankowski
Director of Adult Day Services

Carla Alejo
*Director of In-Home Support Services
and Hoarding Intervention & Treatment*

Susan Howland
Director of Outreach & Case Management

Laura Ramos, MS
Director of Community Counseling

Jennifer Layton, MSW, APSW
Director of Child Welfare Services

Sarah Matson, MS
Director of Supported Parenting Services

Barbara Graham, JD
Director of Refugee and Immigration Services

Jessica Brandt
Parish Relations Coordinator

“A leap of faith is doing something that your mind says is risky but your heart and your trust in God makes you committed that it's going to come through.”

~ **Michael Bloedorn,**
First Vice President and Chairman



3501 S. Lake Dr.
St. Francis, WI 53235
(414) 769.3400
www.ccmke.org

October, 2022