



## **2021-2023 Strategic Plan**

The Strategic Planning Committee of Catholic Charities of Louisville, in partnership with the Board of Directors and staff, has developed this strategic plan to guide the work of the organization over the next three years by providing the basis for the development of its annual operational plans. This plan affirms Catholic Charities' identity and mission; its goals and objectives are an expression of Catholic Charities' vision, mission, and core values. In the coming years, Catholic Charities leadership will use this plan to focus effort, communicate priorities, and navigate a dynamic environment replete with challenges and opportunities.

### **Strategic Planning Committee**

Brother Peter Campbell, CFX  
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Chair: Deacon Scott Haner  
CEO and Executive Director: Lisa DeJaco Crutcher

## ***Foundational Statements***

### **Vision**

In the Spirit of Christ, we work throughout the 24 counties of the Archdiocese of Louisville to build a community where all people are **welcomed** to experience God's love, **strengthened** to live with hope, dignity, and a sense of security, and **empowered** to achieve their full potential.

### **Mission**

Catholic Charities of Louisville serves people in need, especially the poor and oppressed. Consistent with the principles of Catholic social teaching, we build bridges of hope, mercy, and justice as we accompany struggling families and individuals to greater self-sufficiency, one relationship at a time. We collaborate and advocate for necessary changes in social policy. We call the local Catholic Church and others of goodwill to engage in acts of mercy and justice. We support and resource our 110 parishes to expand this work across the Archdiocese of Louisville.

### **Values**

We believe that Christ entrusts to our care the life and dignity of every human person, especially the poor and vulnerable. *Our work is animated by the tradition of Catholic social teaching:*

We **welcome** every person in need of our loving care, seeing that their *rights* are respected and assisting them to take on *responsibilities* which honor their dignity. We seek the *common good* for all people and creation. We stand in *solidarity* with our brothers and sisters regardless of race, creed, or culture.

We **strengthen** individuals and *families* to move from struggle to sufficiency, because the human person is not merely sacred, but social, and called into *participation in community*.

We **empower** individuals and families via *subsidiarity*, supporting others to do for themselves as they are able and to sustain themselves in the *dignity of work*. We work in *solidarity* with our parishes, sharing expertise and resources to effectively carry out the Church's social mission in their local communities.

### **Governance**

Catholic Charities of Louisville is an independent 501(c)(3) corporation operating in the Archdiocese of Louisville, Kentucky. The sole Member of the corporation is the Roman Catholic Archbishop of Louisville. Among his reserved powers, the Member approves annual budgets, capital expenditures, and major programmatic changes, and he appoints the agency's Chief Executive Officer and Board of Directors. The Chief Executive Officer is responsible for supervision and management, and the Directors are responsible for oversight of the corporation.

**Catholic Charities of Louisville**  
**Strategic Plan**  
November 1, 2020

**Focus Area 1: Awareness**

**Goal 1.1 CCL has a developed a comprehensive branding strategy which inspires volunteers and donors and positions itself within the social services community.**

**Objectives:**

- 1.1.1 Review and refine the presentation of CCL's brand: what it stands for, what value it promises to deliver to the community, and what image it projects.  
*(Q1,2021; Director of Development)*
- 1.1.2 Review and refine the elements of CCL's brand: logo, taglines, voice, and tone.  
*(Q1,2021; Director of Development)*

**Goal 1.2 CCL has raised brand awareness to become "top of mind" within the Catholic community and on the short list of respected organizations among entities performing charitable works and social services within the broader community.**

**Objectives:**

- 1.2.1 Develop and monitor a dashboard of metrics that measure the effectiveness of CCL's communications in establishing awareness of CCL and its work.  
*(Begin Q1, 2021 and ongoing; Director of Development)*
- 1.2.2 Become a storytelling organization.
  - Maintain collections of stories/data that illustrate the challenges faced by clients and showcase the impact of CCL's work.
  - Develop a set of talking points and a scripted "elevator pitch" that describes CCL's work, its motivation, and its impact.*(Ongoing; Director of Development coordinates, CCL Leadership Team engages)*
- 1.2.3 Relentlessly communicate CCL's brand internally (board, staff, parishes, volunteers) and externally (those it serves, stakeholders, partners, funders).  
*(Q1, 2022 and ongoing; Director of Development coordinates, CCL Leadership Team engages)*
- 1.2.4 Develop and implement a comprehensive communication plan that provides effective reach across all user groups and consistent messaging across all media platforms.  
*(Q1, 2022; Director of Development)*
- 1.2.5 Further establish CCL's reputation among media outlets and other stakeholders as a resource for data, information, expertise, and impact stories regarding the communities it serves.  
*(Q1, 2022; Director of Development)*

## **Focus Area 2: Engagement**

**Goal 2.1 CCL has more fully integrated its work into the life of the parish, encouraging greater parish engagement in social ministry.**

**Objectives:**

- 2.1.1 Develop and implement a strategy to provide on-going support and user-friendly resources to assist parishes in social ministry.  
*(Begin Q1, 2021 and ongoing; Director of Mission)*
- 2.1.2 Ensure CCL stakeholders (board, volunteers, pastors, parishioners, influencers) are fluent in Catholic Social Teaching and its connection to CCL's work.
  - To include developing CST seasonal prayer services.
  - To include CST resource packets aligned with Days of Dignity*(Q3, 2021 annual assessment and ongoing; Director of Mission)*
- 2.1.3 Explore making CCL programming more accessible by taking it "on the road" to parishes and communities within the Archdiocese, increasing parishes' awareness of CCL's work and the options for engagement.  
*(Q3, 2021 and ongoing; Director of Mission, Director of Programs)*

**Goal 2.2 CCL is recognized within the Archdiocese and the social services community as a collaborator, convener, and catalyst.**

**Objectives:**

- 2.2.1 Continue collaborating with key Archdiocesan leaders seeking synergies across programming areas.  
*(Ongoing, Chief Executive Officer and CCL Leadership Team)*
- 2.2.2 Convene annual community forums, conversations, and learning experiences to address issues and practices related to social services and social justice.  
*(Q2, 2021 and ongoing; Director of Mission)*
- 2.2.3 Working in partnership with other Catholic and like-minded organizations, facilitate individual civic participation by collecting, cataloguing, and communicating opportunities to engage in the community.  
*(Begin Q1, 2022 and ongoing; Director of Administration, Director of Development)*

**Goal 2.3 CCL has broadened its base of support by engaging individuals/organizations that desire to be part of the Catholic Charities Community.**

**Objectives:**

- 2.3.1 Build a robust database to track the Catholic Charities Community (individuals who have engaged CCL's mission in any way).  
*(Q2, 2021 and ongoing; Director of Development)*
- 2.3.2 Develop and implement a "multi-touch" relationship building plan to tell the CCL story and inspire friends to engage.  
*(Q1, 2022; Director of Development)*

- 2.3.3 Strategically enhance digital communications to expand reach, especially to underserved groups such as young people/young adults and individuals not involved in the institutional church.  
*(Q1, 2022 and ongoing; Director of Development)*
- 2.3.4 Develop and implement a strategy to engage young people/young adults who are socially conscious and looking for opportunities to contribute to the community.
- Include outreach to local Universities and Catholic High Schools
  - Include partnerships to assist with outreach to young people/young adults
- (Q3, 2022 and ongoing; Director of Programs, Director of Development)*

### **Focus Area 3: Programming**

**Goal 3.1 CCL has demonstrated operational excellence and community impact with existing programming.**

**Objectives:**

- 3.1.1 Continue annual program evaluation process assessing operational effectiveness, program outcomes, community impact and financial sustainability.  
*(Q1, 2021 repeated annually; Board Program Committee, Director of Programs)*
- 3.1.2 Conduct an annual assessment of highest and best use of available funds with respect to program sunset/continuance/expansion and new program opportunities.  
*(Q2, 2021 repeated annually; Chief Executive Officer, Director of Finance, Board Finance Committee)*

**Goal 3.2 CCL has ensured that its programming reflects the intersection of agency's core competencies and critical community needs.**

**Objectives:**

- 3.2.1 Develop and implement a process to identify CCL's core competencies and the community's most prominent needs, and evaluate current programming against those criteria.  
*(Q2, 2021; Director of Administration, Director of Programs)*
- 3.2.2 Explore opportunities to leverage core competencies against the community's most prominent unmet needs.  
*(Begin Q1, 2022 and ongoing; Director of Programs)*

**Goal 3.3 CCL has utilized process and discipline when considering program expansion and/or new program implementation.**

**Objectives:**

- 3.3.1 When considering program expansion, establish priority focus in 4 critical areas:
- Expanding services in the West End of Louisville and immediate CCL neighborhood
  - Expanding services in rural areas of the Archdiocese
  - Leveraging core competencies to a broader immigrant population
  - Programs that offer enhanced parish engagement
- (Q1, 2021; Chief Executive Officer)*

- 3.3.2 Develop and implement a rubric to evaluate new programming opportunities that assesses fit to mission, core competencies, staff capacity and financial sustainability.  
*(Q3, 2021; Director of Administration)*

#### **Focus Area 4: Social Justice**

**Goal 4.1 CCL's commitment to social justice is clear and unquestioned within the broader community and deeply understood and embraced within the organization itself.**

**Objectives:**

- 4.1.1 Intentionally and consistently connect CCL's programming to Catholic Social Teaching and issues of social justice when communicating about its work.  
*(Begin Q1, 2021 and ongoing; Director of Mission, Director of Development)*
- 4.1.2 Discern and then clearly articulate CCL's "voice" as it relates to social justice.  
*(Q3, 2021; Director of Mission, Chief Executive Officer)*
- 4.1.3 Become a steady champion for social justice, continuously drawing the community's attention to chronic social issues and challenges.  
*(Begin Q1, 2022 and ongoing; Director of Mission)*

#### **Focus Area 5: Revenue Generation**

**Goal 5.1 CCL has successfully completed the *Building a Better Future* capital campaign.**  
*(Q2, 2022; Board Campaign Chair, Chief Executive Officer)*

**Goal 5.2 CCL has implemented critical policies and procedures to support its revenue generation efforts.**

**Objectives:**

- 5.2.1 Develop a metric of funding sources; set annual goals for grants and fundraising and establish funding expectations for each department/program.  
*(Q2, 2021 and ongoing; Director of Development, Director of Finance, Chief Executive Officer)*
- 5.2.2 Engage 100% of the CCL Board in CCL's development effort via:
- Friend-raising to support Awareness Goal 2.3
  - Give/Get financial support
  - Attendance at key CCL events (i.e. Rouler)
  - Commitment to thank key donors
- (Q2, 2021 and ongoing; Board Chair, Director of Development)*
- 5.2.3 Determine the necessary board-designated financial reserve and fully fund it as funds are available.  
*(Q2, 2021 and ongoing; Board Chair, Board Finance Committee, Director of Finance)*
- 5.2.4 Establish a staff culture around revenue generation and development characterized by financial literacy, active support of development efforts, and ownership of development outcomes.  
*(Q3, 2021 and ongoing; CCL Leadership Team)*

5.2.5 Develop and implement a multi-tiered strategy for individual donor recognition.  
*(Q4, 2021 and ongoing; Director of Development)*

5.2.6 Expand use of donor analytics to drive development decision-making.  
*(Q4, 2021 and ongoing; Director of Development)*

**Goal 5.3 CCL has broadened its base of funders and increased support, thus providing steady and sustainable funding for existing programs and potential program expansion.**

**Objectives:**

5.3.1 Refine processes and procedures to increase governmental and private grant funding.  
*(Ongoing; Director of Development)*

5.3.2 Expand funding opportunities through partnerships with corporations and community organizations.  
*(Ongoing; Director of Development)*

5.3.3 Develop and implement a fundraising calendar targeting an increase in free-will donations.  
*(Q1, 2022 and ongoing; Director of Development)*

5.3.4 Fully leverage the funding potential of CCL's social enterprises.  
*(Q3, 2022; Director of Development)*

5.3.5 Develop and implement a legacy/planned giving program.  
*(Q2, 2023 and ongoing; Director of Development)*

**Focus Area 6: Team Development**

**Goal 6.1 CCL employees are confident in their work, flourishing personally as well as professionally.**

**Objectives:**

6.1.1 Enhance programs that recognize and celebrate good work.  
*(Q1, 2021 and ongoing; Human Resources Director, Staff Care Committee)*

6.1.2 Develop a culture of continuing professional development that assesses staff development needs and organizes appropriate staff training.  
*(Q2, 2021 and ongoing; Human Resources Director, Director of Administration)*

6.1.3 Increase staff and volunteer fluency in all of CCL's work, enabling them to be confident ambassadors for the organization.  
*(Begin Q1, 2022 and ongoing; Human Resources Director, CCL Leadership Team)*

**Goal 6.2 CCL's Catholic identity is consciously fostered and embraced across the agency.**

**Objectives:**

6.2.1 Develop and offer opportunities to share faith collectively including Advent/ Lenten prayer services and Mass when appropriate.  
*(Q1, 2021 and ongoing; Director of Mission)*

6.2.2 Continue intentional efforts to educate staff as to Catholic Social Teaching in connection with the policies, work, and social justice initiatives of the agency.  
*(Q1, 2021 and ongoing; Director of Mission, Staff Care Committee)*

6.2.3 Continue to develop and enhance each program's identification with patron saints and underlying principles of Catholic Social Teaching.  
*(Q3, 2021 and ongoing; Director of Mission)*

**Goal 6.3 CCL embraces and leverages the rich diversity of the staff team, commits to breaking down work silos, and operates as one Catholic Charities.**

**Objectives:**

6.3.1 Continue intentional efforts to increase awareness of and effectively work across the cultural differences among staff.  
*(Q1, 2021 and ongoing; Staff Care Committee)*

6.3.2 Develop and enhance opportunities for staff members to learn about the work of CCL outside of their own departments.  
*(Q1, 2022 and ongoing; Director of Development, Staff Care Committee)*

6.3.3 Develop and execute a plan to leverage the synergy of bringing together the staff team in the new Catholic Charities Center.  
*(Q4, 2022 and ongoing; Director of Administration, HR Director, Staff Care Committee)*

**Goal 6.4: CCL team has achieved the capacity to effectively manage the workload.**

**Objectives:**

6.4.1 Ensure staff has capacity to meet unforeseen challenges and opportunities as well as capacity for creative and strategic thinking.  
*(Q3, 2021 and ongoing; Director of Programs, Director of Administration, Program Directors)*

6.4.2 Develop new protocol around planning for department/program growth, including plans for recruiting, hiring, and evaluating new staff members.  
*(Q4, 2021 and ongoing; Director of Administration, Human Resources Director)*

6.4.3 Continue to explore and strategically employ shared staffing arrangements, interns, and volunteers to build staff capacity.  
*(Q3, 2022 and ongoing; Director of Administration, Human Resources Director, Director of Programs)*



## **Appendix: Areas for Consideration as Operational Plans are Developed**

Throughout the planning process, as the goals and the objectives of the plans were articulated and drafted, a number of activities, tactics and strategies emerged. Many were considered good ideas worthy of further consideration. Some were incorporated into the objectives of the plan. Others were deemed to be of an operational nature and not appropriate to be included in a strategic plan.

These activities, tactics and strategies are noted here, listed by plan goal and/or objective within focus area. It is hoped that as the operational plans based on this strategic plan are drafted these will be considered and incorporated as appropriate.

### **Focus Area 1: Awareness**

- 1.1.1 Review and refine the presentation of CCL's brand: what it stands for, what value it promises to deliver to the community, and what image it projects.  
For consideration as plans are developed:
  - Charitable outreach of the local Catholic church
  - Convener and catalyst for charitable collaboration
  - Seek an umbrella that covers the breadth of CCL Programs
- 1.1.2 Review and refine the elements of CCL's brand: logo, taglines, voice, and tone, etc.  
For consideration as plans are developed:
  - Include "WHY" we serve (leveraging the best of our Catholic social values)
  - Include "WHO" we serve (all people in need, regardless of race, creed, or culture)
- 1.2.1 Develop and monitor a dashboard of metrics that measure the effectiveness of CCL's communications in establishing awareness of CCL and its work.  
For consideration as plans are developed:
  - Research best practices regarding awareness tracking
  - Conduct an annual survey to gauge awareness and CCL fluency among various stakeholder groups
- 1.2.2 Become a storytelling organization.
  - Maintain collections of stories/data that illustrate the challenges faced by clients and showcase the impact of CCL's work.
  - Develop a set of talking points and a scripted "elevator pitch" that describes CCL's work, its motivation, and its impact.For consideration as plans are developed:
  - Ensure all functions understand the critical nature of this effort and become storytellers for their programs
  - Provide semi-annual updates to ensure "fresh" material
- 1.2.3 Relentlessly communicate CCL's brand internally (board, staff, parishes, volunteers) and externally (those it serves, stakeholders, partners, funders).  
For consideration as plans are developed:
  - Develop a CCL passport summarizing vision, mission, and values, distribute to all employees
  - Ensure employee and volunteer onboarding/orientation emphasizes who we are, what we do, and why we do it

- 1.2.4 Develop and implement a comprehensive communication plan that provides effective reach across all user groups and consistent messaging across all media platforms.

For consideration as plans are developed:

- Define key user groups to enable enhanced message targeting
- Provide overlays to reach underserved groups, notably youth/young adults and individuals not involved with the institutional Church

### **Focus Area 2: Engagement**

- 2.1.1 Develop and implement a strategy to provide on-going support and user-friendly resources to assist parishes in social ministry.

For consideration as plans are developed:

- Develop and implement a parish metrics tool for annual fluency evaluations
- Consider annual 110 parish “blitz” similar to Covid-19 calls

- 2.1.2 Ensure CCL stakeholders (board, volunteers, pastors, parishioners, influencers) are fluent in Catholic Social Teaching and its connection to CCL’s work.

For consideration as plans are developed:

- Provide state of the art tools to promote CST and how to put it into action
- Promote social ministry in response to Catholic Social Teaching as an integral part of Catholic life motivating individuals to live in service to compassion and justice. Make real the charge at the end of Mass to go out and serve, live the Gospel.

- 2.3.2 Develop and implement a “multi-touch” relationship building plan to tell the CCL story and inspire friends to engage.

For consideration as plans are developed:

- Set annual goals for growth of the Catholic Charities Community (C3)
- Explore non-traditional means of “friend-raising”

### **Focus Area 3: Programming**

- 3.3.1 When considering program expansion, establish priority focus in 4 critical areas:

- Expanding services in the West End of Louisville and immediate CCL neighborhood
- Expanding services in rural areas of the Archdiocese
- Leveraging core competencies to a broader immigrant population
- Programs that offer enhanced parish engagement

For consideration as plans are developed:

- Listen to key stakeholders in the established priority areas
- Explore “best practice” programs from other network contacts
- Evaluate partnerships and collaborations with allies and like-minded groups
- Conduct feasibility studies on best options

### **Focus Area 4: Social Justice**

- 4.1.2 Discern and then clearly articulate CCL’s “voice” as it relates to social justice.

For consideration as plans are developed:

- Build on CCL’s foundational programs and established reputation as a trusted partner on social issues
- Collaborate with appropriate ADOL contacts

## **Focus Area 5: Revenue Generation**

5.2.5 Develop and implement a multi-tiered strategy for individual donor recognition

For consideration as action plans are developed:

- Annual giving society
- Recognition levels with special events (i.e. Dinner with Lisa or ABK)
- Gifting guidelines for key donors

5.3.1 Refine processes and procedures to increase government/private grant funding.

For consideration when action plans are developed:

- Determine amount of grant activity needed to secure necessary funding
- Prioritize options
- Establish connections
- Continue relationship building, especially with large local foundations

5.3.3 Develop and implement a fundraising calendar targeting an increase in free-will donations.

For consideration as action plans are developed:

- Grow annual *Rouler* fundraising event
- Explore solicitation of significant multi-year asks (i.e. 5 years @\$1000)
- Explore opportunities to leverage community fundraising events (i.e. Give for Good)
- Explore opportunity to add an additional major fundraiser to the calendar

5.3.4 Fully leverage the funding potential of CCL's social enterprises.

For consideration as plans are developed:

- Effectively market existing social enterprises to enhance revenue potential
- Leverage CC-USA network to research best practices for social enterprise expansion, evaluating seemingly viable options using the process outlined in Objective 3.3.3

5.3.5 Develop and implement a legacy / planned giving program.

For consideration as action plans are developed:

- Collaborate with the ADOL Advancement team
- Leverage the wisdom of estate planning experts
- Expand awareness of the CCL Endowment as a giving opportunity
- Educate legal trust companies, raising awareness of CCL's work and its connections to their clients' interest

## **Focus Area 6: Team Development**

Goal 6.1 CCL employees are confident in their work, flourishing personally as well as professionally.

For consideration as action plans are developed:

- Provide opportunities for both inter- and intra-departmental cross-training.

Goal 6.4 CCL team has achieved the capacity to effectively manage the workload.

For consideration as action plans are developed:

- Research and implement technological solutions to reduce paperwork, enhance work and information flow, and increase efficiency.

6.1.3 Increase staff and volunteer fluency in all of CCL's work, enabling them to be confident ambassadors for the organization.

For consideration as plans are developed:

- CCL Passport can be a powerful tool when seeking to "seed" a new branding strategy
- Leader-led training cascades demonstrate top-down agency endorsement