

## Strategic Plan Implementation 2017 - 2020

<b>Staff and Leadership Development:</b> <b>Goal: To hire, support, and develop competent and motivated staff.</b>					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>1. 100% of leadership role have a succession plan in place by July 2018 (Succession Plan CEO, Continuation Plan for Managers)</b>	<ul style="list-style-type: none"> <li><u>Review Organization Chart</u></li> </ul>	Staff and Leadership Development Committee	Dec 2018	Substitute Plan	<b>√ Completed</b>
	<ul style="list-style-type: none"> <li><u>Identify appropriate positions-</u> position that you want to replace</li> </ul>	Human Resources	Dec 2018		<b>√ Completed</b>
	<ul style="list-style-type: none"> <li><u>Identify the incumbent-</u> person currently occupying the position</li> </ul>		Dec 2018		<b>√ Completed</b>
	<ul style="list-style-type: none"> <li><u>Review the possible candidates-</u> evaluation of competencies, assessment of candidates,</li> <li><u>Mentor ,Coach, Train</u></li> </ul>	Human Resource	Dec 2018	Identify possible issues regarding the candidate's job description Are individuals agreeable to being assigned??	<b>√ Completed</b>
	<ul style="list-style-type: none"> <li><u>Assign Readiness Rating-</u> High- immediate, Medium 1-2 years ,low 3-5 years</li> </ul>		Dec 2018		<b>√ Completed</b>

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	<ul style="list-style-type: none"> <li><a href="#">Trial period-</a> vacations, personal days</li> <li><a href="#">Reassess candidate</a></li> </ul>		Dec 2018		<b>√ Completed</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>2. Increase internal promotions by 25% by third quarter 2018</b>	<ul style="list-style-type: none"> <li>Post open positions on bulletin boards and in break rooms</li> </ul>	Managers, Team leaders, Support Staff	September 2018	Updated monthly positions sent via email to team leaders, managers and directors	<b>√ Completed</b>
	<ul style="list-style-type: none"> <li>Review Job openings at morning or monthly meetings</li> </ul>	Managers, Team Leaders, Support Staff	September 2018		<b>√ Completed</b>
	<ul style="list-style-type: none"> <li>Identify promotions -</li> </ul>	HR, Subcommittee	Twice annually		<b>√ Completed</b>
	<ul style="list-style-type: none"> <li>Share at Program meetings and in newsletters</li> </ul>	Subcommittee			<b>√ Completed</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>3. Increase staff recognition and appreciation in all departments by 100% by Sept 2018</b>	<ul style="list-style-type: none"> <li><u>Employee Anniversary Recognition</u>- Human Resources generate a list of employees and their anniversary dates</li> </ul>	Human Resource Department	September 2019		<b>In Process</b>
	<ul style="list-style-type: none"> <li><u>Certificates of Appreciation</u>- sent to employees home</li> </ul>	CEO Team Leaders Support Staff		Certificates	<b>√ Completed</b>
	<ul style="list-style-type: none"> <li><u>Personalized Letter</u>- letter thanking employee for their hard work and dedication signed by CEO, sent with the certificate of appreciation</li> <li><u>Gift card</u>- i.e \$5.00 Dunkin Donut gift card</li> </ul>	CEO Team Leaders Support staff		Gift cards	<b>√ Completed</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
	<ul style="list-style-type: none"> <li>• <u>Staff Recognition</u> – an annual dinner/luncheon celebrating 5,10,15.... years of service</li> </ul>	CEO, managers, directors, team leaders		Finances?? Budgeting	<b>√ Completed</b>
	<ul style="list-style-type: none"> <li>• Identify staff recognition – external resources</li> </ul>				<b>√ Completed</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>4. Develop organization-supported leadership training by December 2018</b>	<ul style="list-style-type: none"> <li>Contact Catholic Charities USA</li> <li>Yearly Leadership, topic information, ID Problem areas that need training</li> <li>Subcommittee will survey the needs</li> </ul>	Managers, Directors Team Leaders Supervisors	November 2019	Funds from individual program budgets	<b>✓ Completed</b>
	<ul style="list-style-type: none"> <li>Schedule team leaders for online leadership training classes</li> <li>Share during group meetings</li> </ul>	Managers, Directors Team Leaders Supervisors			<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Schedule annual leadership trainings for Managers/directors</li> </ul>	Managers, Directors Team Leaders Supervisors		Budget	<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Establish a share drive for sharing online resources</li> </ul>	Managers, Directors Team Leaders Supervisors			<b>Not Started</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>5. Implement performance based increases based on evaluations by June 2019</b>	<ul style="list-style-type: none"> <li>Update and modify performance evaluations</li> <li>Provide training to be more objective</li> </ul>	Managers, Directors, Team Leaders	March 2020	Current performance evaluation	<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Utilize scaling 0 to 5, raises are based on grades</li> </ul>	HR, Managers, Directors, Team Leaders	March 2020		<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Tardiness, chart reviews ,degree of consumer engagement</li> </ul>	Managers, Directors, Team Leaders	March 2020	Medicaid reports, chart review reports	<b>Not Started</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	
<b>6. Establish an agency budget of \$10,000 annually to be used for training and development</b>	<ul style="list-style-type: none"> <li>Contact agencies, colleges ,speakers that offer continuing education classes</li> </ul>	Subcommittee	June 2020	Budgeting information	<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Schedule quarterly continuing education classes/training classes</li> </ul>	Subcommittee	June 2020		<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Research affordable training</li> </ul>	Subcommittee	June 2020		<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Keep track of what is offered</li> </ul>	Subcommittee	June 2020		<b>Not Started</b>
	<ul style="list-style-type: none"> <li></li> </ul>				<b>Not Started</b>
	<ul style="list-style-type: none"> <li></li> </ul>				<b>Not Started</b>



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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>7. Increase best practices training resources available at no cost by 25% annually</b>	<ul style="list-style-type: none"> <li>Survey -identify training needs of agency</li> </ul>	Managers, Directors Support Staff	Sep 2020		<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Training in appropriate areas</li> </ul>	Team Leaders		Conference rooms. Audio visual aides, handouts ,power points	<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Managers train supervisors who train team leaders and employees</li> </ul>	Team leaders		Conference room, audio visual	<b>Not Started</b>
	<ul style="list-style-type: none"> <li></li> </ul>				
	<ul style="list-style-type: none"> <li></li> </ul>				
	<ul style="list-style-type: none"> <li></li> </ul>				

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>8. Increase continuing education, training and development offerings for staff (agency wide) by 50% per year</b>	<ul style="list-style-type: none"> <li>Contact speakers, colleges, NAMI, NJ Prevention First, MHA, Redwoods Institute</li> </ul>	Managers, Team leaders	Sep 2020	List of agencies and speakers that offer trainings both online and on site	<b>Not Started</b>
	<ul style="list-style-type: none"> <li>Schedule continuing education classes with various agencies and speakers on site as well as quarterly classes</li> <li>Staff required to complete annual online trainings such as Child Sexual Abuse Trainings and Sexual Harassment Prevention which are offered online (Redwoods Institute)</li> </ul>	Team Leader	Sep 2020		✓ <b>Completed</b>  <b>Not Started</b>
	<ul style="list-style-type: none"> <li>Team Leaders provide training to employees at monthly staff meetings</li> </ul>	Team Leaders	April 2020		<b>Not Started</b>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status	
<b>9. Increase staff participation rate in free technology training that is available online or in the community by 25% per year</b>	<ul style="list-style-type: none"> <li>Develop a list of agencies that offer free online trainings</li> </ul>	Team Leaders	Dec 2020	List of agencies that offers free webinars and trainings, Topic List i.e SAMSHA	<b>Not Started</b>	
	<ul style="list-style-type: none"> <li>Schedule webinars in IT catalog</li> </ul>	Team leaders. IT	Dec 2020		<b>Not Started</b>	
	<ul style="list-style-type: none"> <li>Team Leaders register for various online webinars</li> </ul>	Team Leaders Staff	Dec 2020		<b>Not Started</b>	
	<ul style="list-style-type: none"> <li>Establish a baseline of how many staff participate in free training currently</li> </ul>	Subcommittee	Dec 2020		<b>Not Started</b>	

## Infrastructure Development:

***Goal: To improve internal and external communications marketing, and technology.***

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
1. Increase staff knowledge of all CCAN programs and resources by 100% by July 2018	<ul style="list-style-type: none"> <li>Determine what role HR orientation plays in educating on programs : currently one to one mini orientation at hire meeting with HR; Quarterly in person orientation meetings scheduled by HR.</li> </ul>	Administrative and program mgrs/ HR rep /IT/Marketing	3/26  5/1	HR, Lesley	<b>Completed and ongoing.</b>
	<ul style="list-style-type: none"> <li>Identify gaps in orientation to larger organizational services and expertise</li> </ul>	SPC members	6/30		<p><b>General orientation provides basic information about divisions and services provided (Catalog of Services is distributed).</b></p> <p><b>Updated COS is available to staff. See intranet subpoint below.</b></p>

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
	<ul style="list-style-type: none"> <li>Identify the benefits/challenges of : more frequent orientations; alternate methods of delivery (eg to accommodate staff 24/7 work schedules and availability; the possible use of technology based methods -eg webinars, short movie- to expand access to and efficiency of orientation</li> </ul>				<b>No funding for external technology.</b>
	<ul style="list-style-type: none"> <li>Revise orientation methods based on findings</li> </ul>				
	<ul style="list-style-type: none"> <li>Create defined point person, protocol, content framework and timeframe for website updates. (we currently have a volunteer who updates the website, information provided to Maria B. to be given to vol.)</li> </ul>	Maria B, Key program reps where marketing matters most	6/30		<b>See strategy item 2 below.</b>

## Infrastructure Development:

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
	<ul style="list-style-type: none"> <li>Develop intranet for shared resources and access to directory of staff and services.</li> </ul>	IT	4/26	Patrick Sheehan/IT reps.	<b>Ongoing: Proposed employee-only intranet access, to be housed on new website, for agency documents including COS and other key communications.</b>
	<ul style="list-style-type: none"> <li>Develop metric to measure current level of staff knowledge of programs.</li> </ul>	Ad hoc committee to be developed	4/30	Lesley Moore	
	<ul style="list-style-type: none"> <li>Assess funding for/viability of using external web resources (ie webinar service) and databases. (Per Patrick and Maria we do not currently use any external web-based resources)</li> </ul>	IT, Administration		Patrick Sheehan, John Westervelt	<b>See above. No funding available for external technology.</b>
	<ul style="list-style-type: none"> <li>Increase use of technology / web-based databases of programs and resources that staff can access anytime anywhere</li> </ul>	IT	9/2018		<b>No funding for external technology. Ongoing: Individual departments/</b>

### Infrastructure Development:

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
					programs to assess grant or other program-based funding for software/technology.

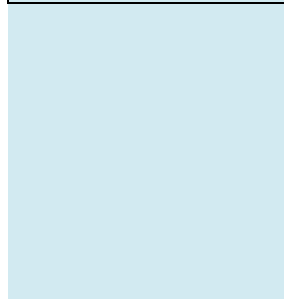
### Infrastructure Development:

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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
2. Increase external presence (social media, annual report, etc) in communications by 25% by first quarter of 2018	<ul style="list-style-type: none"> <li>Clarify/understand current communications plan/staffing.</li> </ul>	Peter, Barbette	3/26	John	<b>No budget for social media or marketing coordinator. Strategy items 2 and 4 consolidated. Social media and website to be used as primary marketing tools, managed internally.</b>
	<ul style="list-style-type: none"> <li>Develop formal plan for communication.</li> </ul>	Barbette	5/1/18	John	<b>Completed and ongoing: developed monthly posting schedule for website, Facebook and Instagram.</b>
	<ul style="list-style-type: none"> <li>Measure current web/social media presences.</li> </ul>	Barbette	4/1/18	Lesley/Kiera	<b>Ongoing: Grants tracks postings on social</b>



					<b>media by program/date</b>
	<ul style="list-style-type: none"> <li>Understand other methods of communication used by the agency.</li> </ul>			Maria John Peter	<b>Direct mail, ads/articles in local Catholic publications</b>
	<ul style="list-style-type: none"> <li>Catalog of services – updated quarterly</li> </ul>	Maria	3/2018 & updated quarterly	Maria	<b>Ongoing. See orientation and intranet subpoints above.</b>



### Infrastructure Development:

***Goal: To improve internal and external communications marketing, and technology.***

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
3. Develop a method of internal connection between administrative departments (eg HR, finance, facilities) and programs to improve teamwork by March 2018	<ul style="list-style-type: none"> <li>Implement protocol and schedule (quarterly?) for cross-team meetings (managers and administration).</li> <li>Identify general purpose, goals, members, and topics</li> </ul>	Managers across CCAN entities; administrative reps -eg HR, finance, Risk management	4/30		<p><b>Partially consolidated with strategy item 1, see above.</b></p> <p><b>Ongoing: Quarterly meetings including Directors and HR proposed at SMC.</b></p>
	<ul style="list-style-type: none"> <li>Connect to Development that include communication across multiple platforms – digital, print, community presentations</li> </ul>	Development	12/2018		<p><b>See item 2 – utilize social media and website to promote development activities.</b></p> <p><b>Ongoing: Proposed employee-only intranet access, to be housed on new website, for housing</b></p>

					<b>key agency documents as well as key communications.</b>
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### Infrastructure Development:

*Goal: To improve internal and external communications marketing, and technology.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>4. Develop and implement a formal marketing plan by September 2018</b>	<ul style="list-style-type: none"> <li>Assess current marketing, program wide and agency wide</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	June 2018	programs' input and computers, online and paper surveys	<b>Strategy item 4 and all subpoints consolidated with strategy item 2. See above.</b>
	<ul style="list-style-type: none"> <li>Create marketing goals with timelines</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	July 2018	marketing templates or examples	
	<ul style="list-style-type: none"> <li>Create a message</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	August 2018		
	<ul style="list-style-type: none"> <li>Define budget for marketing plan</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	July 2018		
	<ul style="list-style-type: none"> <li>Define resources for marketing plan</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	July 2018		

	<ul style="list-style-type: none"> <li>Define assessment tools for outcomes</li> </ul>	Barbette Lherisson, Peter Ruccione, Maria Biancheri, John Westervelt	August 2018		
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<b>Infrastructure Development:</b> <i>Goal: To improve internal and external communications marketing, and technology.</i>					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>5. Identify the needs in our technical capacity – bandwidth, programs, equipment, timeless access and address those needs by June 2018</b>	<ul style="list-style-type: none"> <li>Assess who needs what, per program.</li> </ul>		June 2018	IT, program managers	<b>Inventory of available resources completed, current through 9/20.</b>
	<ul style="list-style-type: none"> <li>Identify current capacity and gaps in capacity.</li> </ul>		June 2018	IT	<b>WiFi capability in 80% of buildings, remaining sites need to be installed/fixd.</b>

	<ul style="list-style-type: none"> <li>Identify priorities and overlaps for efficient use of resources.</li> </ul>		June 2018	IT, program managers	Encrypted email identified as top priority.
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Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>6. Ethics and Technology – Develop policies and procedures for informed consent</b>	<ul style="list-style-type: none"> <li>Educate all staff on policies and procedures and develop tools for monitoring compliance</li> </ul>	IT; HR	2018	IT; HR	PS and JW working on vendor for encryption of all Agency devices. Once in place guidance will be provided to staff.

and HIPAA/cyber-security protection for mobile / digital communication annually.	• Other steps?				
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	•				
	•				

Infrastructure Development: <i>Goal: To improve internal and external communications marketing, and technology.</i>					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
7. Identify the air-conditioning and heating needs for	• what is the status of this project?	Finance Facilities John Westervelt			

<b>all facilities by December 2017;</b>  <b>Improve air-conditioning and heating of facilities with identified needs by June 2018</b>	<ul style="list-style-type: none"> <li>Is June 2018 a realistic deadline?</li> </ul>	Finance Facilities John Westervelt			
	<ul style="list-style-type: none"> <li>Is there already an improvement plan in place, with identified priorities?</li> </ul>	Finance Facilities John Westervelt			





## Infrastructure Development:

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<b>9. Develop a written implementation plan that identifies how the strategic priorities will be operationalized and the best strategies for carrying out the Strategic Plan by January 2018.</b>	<ul style="list-style-type: none"> <li>Form Strategic Planning Implementation Committee</li> </ul>	All Directors, Finance, IT, Development, Grants, HR, Liz, John	02/2018		
	<ul style="list-style-type: none"> <li>Form Subcommittees</li> </ul>	All Directors, Finance, IT, Development, Grants, HR, Liz, John	06/2018		
	<ul style="list-style-type: none"> <li>Identify reporting mechanism and schedule</li> </ul>	Implementation Committee	09/2018		

### Infrastructure Development:

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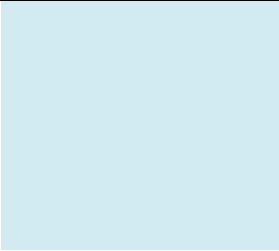
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<p><b>7. Identify the air-conditioning and heating needs for all facilities by December 2017;</b></p> <p><b>Improve air-conditioning and heating of facilities with identified needs by June 2018</b></p>	<ul style="list-style-type: none"> <li>Identify HVAC needs for each facility</li> </ul>	Finance Facilities John Westervelt	12/17	N/A	Not completed needs to be carried on to next year; HVAC needs were not identified
		Finance Facilities John Westervelt			
		Finance Facilities John Westervelt			

**Infrastructure Development:**

*Goal: To improve internal and external communications marketing, and technology.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<p><b>8. Assess capital needs of all facilities by December 2018</b></p> <p>Perform upgrades of facilities with identified needs by 25% by end of 2018 with a plan for 100% by 2020</p>	<ul style="list-style-type: none"> <li>Perform a capital needs assessment for each facilities</li> </ul>	<p>Facilities John Westervelt</p>	<p>12/18</p>	<p>Npital/A</p>	<p>Not completed; capital needs were not yet identified.. These goals need to be carried on to the next strategic plan.</p>
	<ul style="list-style-type: none"> <li>Perform upgrades of facilities with identified needs by 25%</li> </ul>	<p>Facilities John Westervelt</p>	<p>12/18</p>	<p>Vendors</p>	<p>Not completed; capital assessment was not completed. These goals need to be carried on to the next</p>

					strategic plan.
	<ul style="list-style-type: none"><li>Perform upgrades of facilities with identified needs by 25%</li></ul>	Facilities	6/20	vendors	Not completed; same as above



**Financial Growth and Stability: Goal: To increase restricted and unrestricted funds.**

**1. Increase unrestricted funds by 70% annually**

<ul style="list-style-type: none"> <li>• Establish baseline of what unrestricted funds is currently</li> </ul>	Currently receiving	<b>Completed</b>
<ul style="list-style-type: none"> <li>• Development Plan for 2018 - PR</li> <li>• Development Plan annually for each fiscal year.             <ul style="list-style-type: none"> <li>○ Special Events</li> <li>○ Annual Appeal</li> <li>○ Major Donor cultivation</li> <li>○ Foundation / Corporate grants</li> </ul> </li> </ul>	Development Committee of the Board CCAN Development Subcommittee Marketing / Social Media Archdiocesan Development ?	<b>Ongoing</b>
<ul style="list-style-type: none"> <li>• Obtain quotes for a foundation grant database - PR</li> <li>• Purchase a foundation grant database - MB</li> <li>• Apply for foundation grants - MB</li> </ul>	Funds to pay for database	<b>Completed</b>
<ul style="list-style-type: none"> <li>• Establish relationships with local businesses             <ul style="list-style-type: none"> <li>○ Audible</li> <li>○ Prudential</li> <li>○ Other Newark business leaders</li> </ul> </li> </ul>	Cardinal Tobin Board Trustees (current) Board Trustees (new)	<b>Ongoing</b>

**2. Increase new donors by 25% annually**

<ul style="list-style-type: none"> <li>Establish baseline of current # of donors - PR</li> </ul>		<b>Completed</b>
<ul style="list-style-type: none"> <li>Development Plan (annually) - PR</li> </ul>	Development Committee of the Board CCAN Development Subcommittee Marketing / Social Media Archdiocesan Development ?	<b>Ongoing</b>
<ul style="list-style-type: none"> <li>Special Events – Current</li> <li>Special Events - Proposed</li> </ul>	Gala, Golf, Concert	<b>Completed</b>

**3. Increase current donor contributions through cultivation and engagement by 30% annually**

<ul style="list-style-type: none"> <li>Establish baseline – TS &amp; PR</li> </ul>	See attached list, TS	<b>Completed</b>
Marketing materials, PR Catalog Newsletter Annual Report Social Media <ul style="list-style-type: none"> <li>\$ for design, printing and mailing</li> </ul>		<b>Ongoing</b>
<ul style="list-style-type: none"> <li>Small cocktail parties with Board of Trustees</li> </ul>		<b>To be developed</b>
<ul style="list-style-type: none"> <li>Invite donors to events with clients (ie graduations, holiday parties, etc)</li> </ul>		<b>To be developed</b>

#### 4. Increase requests for funding by 20% annually

<ul style="list-style-type: none"><li>Establish baseline – MB &amp; PR</li></ul>	See attached	<b>Completed</b>
<ul style="list-style-type: none"><li>Obtain quotes for a foundation grant database – MB &amp; PR</li><li>Purchase a foundation grant database</li><li>Apply for foundation grants</li></ul>	Vernon Peterson	<b>Completed</b>

#### 5. Increase fees by 20% (where applicable) by June 30, 2018

<ul style="list-style-type: none"><li>Identify programs that charge fees - TS</li></ul>	See attached	<b>Completed</b>
<ul style="list-style-type: none"><li>Conduct an analysis of rates to ensure our fees are competitive – MM</li></ul>	See attached	<b>Ongoing</b>



**6. Reduce fixed costs (infrastructure) by 5% by June 2019**

<ul style="list-style-type: none"> <li>• Conduct a facility assessment of all buildings owned/leased – JW &amp; TS</li> </ul>	See attached, TS	<b>Completed</b>
<ul style="list-style-type: none"> <li>• Consolidation of properties to save fixed costs</li> </ul>	Board of Trustees	<b>Completed</b>

**7. Increase fee-based program for new populations by July 2019**

<ul style="list-style-type: none"> <li>• Add question to the Program Planning process regarding fee based expansion/options – MB &amp; LZ</li> </ul>		<b>Ongoing</b>
<ul style="list-style-type: none"> <li>• For programs that identify options for fee-based programming: - LM &amp; MM             <ul style="list-style-type: none"> <li>○ Research market to determine rates</li> <li>○ Identify needs to develop new programming</li> </ul> </li> </ul>		<b>Ongoing</b>

## Organizational Alignment:

**Goal: To unify and align the organization to our Catholic identity.**

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
1. Increase stakeholder clarity around faith, mission, and vision by 100% by April 2018	<ul style="list-style-type: none"> <li>Identify stakeholders</li> <li>Identify deaneries and schedule of meetings</li> </ul>	John Westervelt Susana Armas	August, 2019	Father Tortora will be the go-between. 9/11/19 Susana met with Father Tortora to create a booklet to present to the deaneries.	<b>In process/ Ongoing Not Started</b>
	<ul style="list-style-type: none"> <li>Develop a Communications Plan for our Mission Statement</li> </ul>	John Westervelt Fr. Tortora Susana Armas	June 2018	Mission statement will be send by IT to	<b>Completed December 2018</b>
	<ul style="list-style-type: none"> <li>Establish a schedule to attend all deaneries</li> <li>Develop a presentation</li> <li>Give presentation to all deaneries</li> </ul>	John Westervelt Fr. Tortora Susana Armas	December 2019	Program/Mission Committee Father Tortora and Susana	<b>In process/ ongoing We are creating a booklet to present to the deaneries by Dec. 19</b>

### Organizational Alignment:

*Goal: To unify and align the organization to our Catholic identity.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
	<ul style="list-style-type: none"> <li>Give Presentation at Manager's Meeting</li> </ul>	John Westervelt Father Tortora	September 2019	Presentation at Convocation, October, 2019, Management Meeting Nov. 19	<b>In process</b>
	<ul style="list-style-type: none"> <li>Develop and mail communication to all staff</li> </ul>	John Westervelt Fr Tortora	September 2019	Directory of services, catalog and 1 page	<b>Completed</b>
	<ul style="list-style-type: none"> <li>Set up schedule of brown bags on agency mission for all staff</li> </ul>	John Westervelt Father Tortora	September 2019		<b>In process/ongoing.</b>  <b>Mission will be presented at the beginning of every power point presentation. IT will send to all staff our Mission Statement.</b>

## Organizational Alignment:

**Goal: To unify and align the organization to our Catholic identity.**

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>2. Increase stakeholder knowledge of programs and services (agency-wide) by April 2018</b>	<ul style="list-style-type: none"> <li>• Update Catalog of Services</li> </ul>	Maria Biancheri Agency staff	January 2018	Monies to design and print the catalog	<b>Completed March 2019</b>
	<ul style="list-style-type: none"> <li>• Develop Annual Report (FY 17, FY 18 and FY 19)</li> </ul>	Maria Biancheri	March 2018 Nov 2018 No 2019 Nov 2020	Monies to design and print the report	<b>Completed 2018 Completed 2019</b>
	<ul style="list-style-type: none"> <li>• Managers' Meeting</li> </ul>	John Westervelt  Elizabeth McClendon	December 2019	Convocation October 2019  Management Meeting Nov. 19	<b>In process/ By Oct. 19 and Nov 19</b>
	<ul style="list-style-type: none"> <li>• Develop and mail catalog of services to all staff                             <ul style="list-style-type: none"> <li>○ Put online and in public folder</li> </ul> </li> </ul>	John Westervelt  Fr Tortora	April 2018		<b>Completed December 2018</b>

## Organizational Alignment:

*Goal: To unify and align the organization to our Catholic identity.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
3. 100% of Board and staff will be able to articulate statement of faith, vision and mission by March 2019	<ul style="list-style-type: none"> <li>• Communication Plan</li> </ul>	John Westervelt		Program/Mission Committee	In process
	<ul style="list-style-type: none"> <li>• Staff Survey</li> </ul>				In process
	<ul style="list-style-type: none"> <li>• Staff orientation                             <ul style="list-style-type: none"> <li>○ Review content for updating as needed</li> </ul> </li> </ul>	Paula Hak John Westervelt Elizabeth McClendon	June 2018		Completed August 2018
	<ul style="list-style-type: none"> <li>• Manager's Meeting</li> </ul>	Paula Hak John Westervelt Elizabeth McClendon	December 2019	Convocation 2019 Management Meeting Nov. 19	In process/ by Oct and Nov. 2019
	<ul style="list-style-type: none"> <li>•</li> </ul>				

### Organizational Alignment:

*Goal: To unify and align the organization to our Catholic identity.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
4. Create an internal (electronic) resource directory for all programs and make available to staff by April 2018	<ul style="list-style-type: none"> <li>Develop Catalog of Services</li> <li>Make Catalog available online</li> </ul>	Maria Biancheri Directors	January 2018	Monies to design and print the catalog	<b>Completed</b>
	<ul style="list-style-type: none"> <li>Establish a quarterly schedule of updates to the catalog</li> </ul>	Maria Biancheri Directors	March 2018		<b>Completed</b>
	<ul style="list-style-type: none"> <li></li> </ul>				

### Organizational Alignment:

*Goal: To unify and align the organization to our Catholic identity.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
5. Increase number of staff retreats to 2 per year by June 2018	<ul style="list-style-type: none"> <li>Schedule a Manager's Meeting for April/May 2018</li> </ul>	John Westervelt Elizabeth McClendon	December 2019	Convocation?	In process/ Nov 19
	<ul style="list-style-type: none"> <li>Determine a regular schedule of Manager's Meetings twice annually</li> </ul>	John Westervelt Elizabeth McClendon	December 2019		In process/Nov 19
	<ul style="list-style-type: none"> <li>Research motivational speakers</li> </ul>	John Westervelt Maria Biancheri	January/February 2020	Convocation 2019	Completed Oct. 19

### Organizational Alignment:

*Goal: To unify and align the organization to our Catholic identity.*

Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
6. Increase number of board member site visits by 100% by June 2018	<ul style="list-style-type: none"> <li>Identify board members who have not visited sites</li> </ul>	John Westervelt Msgr. Fuhrman Brother Benedict LoBalbo	May 2018	Msgr. Fuhrman Program/Mission Committee	In process.
	<ul style="list-style-type: none"> <li>Establish a schedule of monthly site visits and disseminate to Board members</li> </ul>	John Westervelt Msgr. Fuhrman Brother Benedict LoBalbo	July 2018		In process



## Strategic Plan Implementation 2017 - 2020

Programs and Services:					
Goal: To evaluate and sustain high quality and necessary programs and services.					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
1. Increase inter-program referrals to better serve the multiple needs of clients by 25% by June 2019	<ul style="list-style-type: none"> <li>Create an electronic catalogue of all agency programs accessible to all.</li> <li>Map Resources</li> </ul>	Program Manager IT	N/A	N/A	<b>Completed</b>
	<ul style="list-style-type: none"> <li>Keep track of referrals, MIS to assist with inter program referrals, attached to electronic catalogue.</li> </ul>	Program manager/ team leader IT	N/A	N/A	<b>Completed; Program MIS reports were updated to capture intra-agency referrals and distributed in July 2019.</b>
	<ul style="list-style-type: none"> <li><del>Develop Program Referral Process</del></li> </ul>	N/A	N/A	N/A	

## Strategic Plan Implementation 2017 - 2020

Programs and Services:					
Goal: To evaluate and sustain high quality and necessary programs and services.					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
					referrals
	<ul style="list-style-type: none"> <li>Yearly in-service with all agency programs.</li> </ul>	Program manager/ team leader  IT  HR	10/20	N/A	Ongoing– Members are looking into facilitators and venue for in-service on self-care to be provided in fall.
	<ul style="list-style-type: none"> <li>Yearly team building/meet &amp; greet in service.</li> </ul>	Program manager/ team leader  IT  HR	10/19	Speakers, Display boards, Projector,	Completed on 10/3/19

## Strategic Plan Implementation 2017 - 2020

<b>Programs and Services:</b> <i>Goal: To evaluate and sustain high quality and necessary programs and services.</i>					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
<b>2. Unify PQI processes throughout the agency by June 2018</b>	<ul style="list-style-type: none"> <li>Combined meeting (MCBG &amp; Catholic Charities) 2x's per year.</li> </ul>	Team Leaders Directors	N/A	N/A	<b>Completed</b>

## Strategic Plan Implementation 2017 - 2020

Programs and Services:					
Goal: To evaluate and sustain high quality and necessary programs and services.					
Proposed Strategy	Activity / Tasks	Team members	Deadline	Resources Required	Status
3. Increase the provision of needed program resources (paper, post it notes, etc) annually	<ul style="list-style-type: none"> <li><del>Basing a budget based on program # and needs.</del></li> </ul>	Team Leader	9/19		<b>Discontinued – each program meets annually with administration to create a budget</b>
	<ul style="list-style-type: none"> <li>Team Leader/ Program Manager to work closely with support staff for purpose of monitoring adequacy of resources.</li> </ul>	Team leader Support staff	9/19		<b>Ongoing – It still has not be finalized how programs can share surplus supplies or inform other programs supplies needed. Suggestions were offered regarding listing them on a shared drive or announcing it at PQI meeting.</b>