



CATHOLIC CHARITIES
Diocese of Arlington

Executive Summary



Catholic Charities of the Diocese of Arlington

Vision 2020

Encountering Christ and Transforming Lives

July 2015

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Executive Summary

I. Introduction

This Executive Summary provides a brief overview of Vision 2020, the strategic plan of Catholic Charities of the Diocese of Arlington (CCDA). Vision 2020 encompasses the five-year timeframe from July 1, 2015, to June 30, 2020.

Vision 2020 has been a collaborative effort of the Board of Directors and senior staff of CCDA. In March 2014, the Board of Directors adopted a Vision Plan, subsequently approved by Bishop Loverde, which calls for doubling the number of persons served by Catholic Charities over the next five years to meet the ever-increasing needs within the Diocese; this also means doubling the annual budget from roughly \$8 million in FY 2014 to \$16 million by FY 2020. (See Appendix.) This “16x20” goal has been a driving factor in the preparation of Vision 2020.

The Board’s Planning Committee, chaired by Brian Roberts, has been responsible for overseeing the development of the strategic program goals outlined in this document. Concurrently, the Advancement and Communications Committee, chaired by Ron Riggins, has been responsible for creating a five-year development plan that tracks the financial requirements of these strategic program goals and outlines development strategies for generating the necessary revenue to accomplish these goals. In short, then, Vision 2020 comprises both a “technical section” of program goals, followed by a “development section” that addresses the funding of these goals.

Throughout this process, on both the program side and development side, President and CEO Art Bennett and his Executive Team have been deeply involved in the process of identifying program goals, priorities, timetables, and budgets. As a result, Vision 2020 is not merely a directors’ “wish list” detached from reality, but a workable plan that senior management is committed to carrying out.

In addition to the actual program goals and development goals, Vision 2020 offers an innovative approach to categorizing all programs under one of five new “service areas,” and also employs planning tools such as “SMARTER” goals for all programs and the Phase Review Decision Model for evaluating new and expanding programs. The result is a useful and practical planning document intended to be reviewed and updated annually throughout its five-year life.

II. Strategic Planning for Programs

Everything that Catholic Charities does, from the programs it currently operates to the strategic planning it conducts for the future, is based on principles and values that reflect Catholic teachings and that respond to God’s call to serve the neediest among us. Those principles and values can be found in the Catholic Charities Mission Statement (Tab 2), Vision Statement (Tab 2), and Four Core Values (Tab 3).



These core values call on CCDA to (1) serve the poor, (2) integrate our Catholic faith, (3) transform lives, and (4) increase resources. The authors of Vision 2020 distilled these principles and values into a “Rallying Cry” for 2020: “Encountering Christ and Transforming Lives.”

With these foundational principles and values firmly in place, the strategic planning process for programs moved through a number of steps that can be summarized as follows:

- Approach the strategic planning process with the presumption of improving all programs through Enhancement, Expansion, and Outreach (*i.e.*, interactions, partnerships, and evangelization).
- Identify five broad service areas: (1) Crisis Response; (2) Dignity of Life; (3) Health; (4) Immigrants and Refugees; and (5) Transformational Housing.
- Articulate a Vision (*i.e.*, strategic goal) for each service area.
- Organize current and proposed programs under these five service areas.
- Articulate “SMARTER” goals (*i.e.*, tactical goals) for each program: *Specific, Measurable, Achievable, Realistic, Timely, Exciting, Relevant.*
- Designate Priority Programs within each service area.
- Utilize the Phase Review Decision Model to evaluate new and expanding programs.

III. The Five Service Areas and Programs for Each

1. Crisis Response

- Emergency Assistance*
 - Rent and Utilities
 - Prescriptions
- St. Lucy Project – food*
- Burial Plots
- Car Ministry
- Christians Are Networking
- Thrift Store
- Evening Meal
- Financial Literacy/Debt Reduction (NEW)

2. Dignity of Life

- Pregnancy and Adoption Support
 - Pregnancy Support
 - Adoption
 - St. Gianna Molla Maternity Home (NEW)*
 - Post Adoptive Counseling



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- St. Martin de Porres Senior Services*
 - Counseling
 - Elder Care Consultations
- Prison Ministry

- 3. Health
 - Mental Health/Family Services
 - Counseling*

- 4. Immigrants and Refugees
 - Migration and Refugee Services
 - Hogar Legal*
 - Hogar Education

- 5. Transformational Housing
 - St. Margaret of Cortona*
 - Christ House*
 - Housing for Victims of Human Trafficking (NEW)*

*Denotes Priority Programs

IV. A Brief Look at Two Potential Programs To Be Explored

St. Gianna Molla Maternity Home

Catholic Charities has extensive experience working with pregnant women and new mothers through our adoption services, through the St. Margaret of Cortona Transformational Residences for vulnerable families, and through counseling services at Mary's Shelter in Fredericksburg. However, it is evident that there is a strong need within the Diocese for a home for pregnant mothers and their children. Thus, Catholic Charities could be well positioned to develop and operate such a home.

Vision 2020 sets a goal of opening the St. Gianna Molla Maternity Home in FY 2019. This would only occur after a careful and prudent evaluation using the Phase Review Decision Model. If outcomes were positive at each successive step, the timetable would follow this sequence: FY16: Analysis; FY17: Design Implementation; FY18: Design Test; and FY19: Launch. This program is discussed in detail at Tab 9.

Housing for Victims of Human Trafficking

Human trafficking has become a serious problem in the Washington metropolitan area because of its proximity to the I-95 corridor and three major airports.

Vision 2020 sets a goal of establishing a secure home for victims of human trafficking by FY 2022. It envisions a 10-bedroom facility in the western part of the Diocese. The home would provide intensive case management and counseling with an emphasis on trauma recovery, life skills, and, ultimately,



workforce development to move clients from helplessness and dependency to strength and independence. Like the maternity home, this would involve a multi-year process using the Phase Review Decision Model. If outcomes were positive at each successive step, the timetable would follow this sequence: FY17: Analysis; FY18: Design Implementation; FY19: Design Test; and FY22: Launch. This program is discussed in detail at Tab 9.

V. Strategic Planning for Development

The goal of Vision 2020 is to achieve a total annual operating budget of \$16 million by FY 2020, thereby implementing the Vision Plan for expansion approved by the Bishop and Board in 2014. An operating budget of this size will be sufficient to fund the new and expanding programs outlined in Vision 2020.

Operating revenue will come from four principal sources:

1. **Development activities:** A variety of initiatives focused on increasing development channels (funding sources), donor headcount, and average gift size.
2. **Program operations:** Service fees from programs and income from Migration and Refugee Services.
3. **Diocesan contributions:** The Bishop's annual allocation, Bishop's Lenten Appeal, and Bishop's Leadership Initiative.
4. **Other sources:** Investment income, endowment income, planned giving (bequests), and other miscellaneous income.

The development revenue portion of the \$16-million total revenue target is \$10 million by the end of FY 2020, just over double the FY 2015 budgeted level. Development revenue is projected to increase as a percentage of total revenue, from just under 50% in FY 2014 up to a range of 60% to 65% by FY 2020.

The Five Year Development Plan outlined in Vision 2020 focuses on development revenue only. This plan reflects a "bottom up" approach whereby revenues from the various development channels are estimated for each of the next five years, leading to a \$10-million development revenue objective in FY 2020. With FY 2015 development revenue budgeted at \$4.5 million, the indicated increase by FY 2020 is \$5.5 million, for an average annual increase of \$1.1 million.

Key Revenue Drivers – Tier 1 Development Initiatives

Several key revenue drivers have the greatest potential for growth and are anticipated to account for approximately \$4.6 million of the targeted increase of \$5.4 million in development revenue by FY 2020:

- **Fundraising Council:** The Fundraising Council is slated to launch in late 2015 with an interim target of 10 to 12 members on the way to an eventual target of 25 members. This group of wealthy donors will provide a predictable source of major gifts. Projected revenue increase by FY 2020: \$1.0 million.



- **Other Major Gifts:** Growth in this category will reflect an increase in the number of donors and increasing gift size. Projected revenue increase by FY 2020: \$0.85 million.
- **Grants:** CCDA will seek larger grants from government, corporations, and foundations with the assistance of an outside consultant specializing in faith-based nonprofits. Some of the largest initial grants will likely be sought for the St. Lucy Project, Christ House, St. Margaret of Cortona, and the proposed maternity home. Projected revenue increase by FY 2020: \$1.194 million.
- **Catholic Charities Ball:** Continued growth is anticipated through increases in parish table sales, auction revenue, “Dutch Auction” bidding, corporate sponsorships, and matching gifts, plus enhancements in “show quality” such as honorary awardees and celebrity emcees. Projected revenue increase by FY 2020: \$0.365 million.
- **Evangelization Programs:** A new initiative involving parish pastors, with anticipated benefits such as increased awareness, volunteerism, and support for CCDA initiatives. Projected revenue increase by FY 2020: \$0.84 million.
- **Corporate Giving:** A new initiative to focus on corporate contributions and workplace giving among corporations located in Northern Virginia, including several Fortune 500 companies. Projected revenue increase by FY 2020: \$0.35 million.

Ongoing Revenue Sources – Tier 2 Development Initiatives

Several current programs will continue to provide steady sources of development revenue with modest prospects for growth over the next five years, totaling approximately \$0.9 million. These sources (\$0.9 million), combined with the key revenue drivers (\$4.6 million), account for the \$5.5 total projected increase in development revenue to \$10 million by FY 2020:

- **Direct Mail and Newsletter:** Projected revenue increase by FY 2020: \$0.575 million.
- **Christmas Collection:** Projected revenue increase by FY 2020: \$0.1 million.
- **Contributions:** Projected revenue increase by FY 2020: \$0.0 million.
- **Workplace Giving (CFC, America’s Charities):** Projected revenue increase by FY 2020: \$0.195 million.

In conjunction with Tier 1 and Tier 2 development initiatives, Vision 2020 also anticipates significantly expanded communications and marketing initiatives to include: (1) increased communications with parishes and parishioners; (2) enhanced online communications including multi-channel fundraising; (3) new marketing, public relations, advertising, and direct response initiatives; (4) program-related special events and marketing support; and (5) donor communications tied to “key causes” per month.



VI. Conclusion

Vision 2020 is an ambitious yet realistic five-year strategic plan for implementing the Catholic Charities Vision Plan (see Appendix) of doubling the number of persons served and doubling the annual operating budget by FY 2020. In addition to expanding current programs, Vision 2020 anticipates CCDA exploring the possibility of undertaking two new programs for under-served groups: a maternity home for unwed mothers and their children, and a housing facility for victims of human trafficking.

It is anticipated that the new and expanding programs outlined in the first portion of Vision 2020 will be funded according to the development plan outlined in the second portion. This development plan sets forth strategies for increasing development revenue to \$10 million by FY 2020, which, together with other sources of income, will reach the overall revenue goal of \$16 million by FY 2020 – the “16x20” goal set by the Board.