

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

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

Empowered means having the knowledge, confidence, means, or ability to do things or make decisions for oneself. It can also refer to being confident and in control of your life.

STRATEGIC PLAN GOALS 2025-2028



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

The 2025-2028 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. ADAPTIVE PROGRAM DEVELOPMENT - Ensure responsiveness to evolving community needs by regularly assessing and adjusting programs to maximize impact
Objective 1.1 Grow and/or downsize programs as needed in response to evolving community needs, data analysis, funding opportunities or lack thereof, and mission alignment
Objective 1.2 Develop partnerships with service providers and funders to expand housing solutions within our service area
Objective 1.3 Develop partnerships with service providers and businesses for enhanced service delivery, resource sharing, and in-kind donations

GOAL 2. TECHNOLOGY ENHANCEMENT – Upgrades to effectively improve technology infrastructure to enhance efficiency, security, and service delivery across all programs
Objective 2.1 Ensure all agency computer hardware is compatible with the latest Windows operating system
Objective 2.2 Ensure full utilization of paid software programs to maximize return on investment (Client Track, Salsa, SAGE INTAACT, Therapy Notes, eKyros, Lawlogix, MFiles)
Objective 2.3 Implement Cybersecurity enhancements and strengthening of data protection measures to safeguard sensitive client and agency information

GOAL 3. ENHANCED BRAND AWARENESS – Enhance brand awareness and marketing to increase support for Catholic Charities mission and services
Objective 3.1 Engage a branding consultant to assess our branding strategy and enhance organizational visibility and cohesive identity
Objective 3.2 Develop and share compelling testimonials and impact stories to showcase Catholic Charities strengths and success
Objective 3.3 Implement targeted campaigns (mail, email, and social media) to boost support and participation

GOAL 4. EXPAND DONOR BASE & ENGAGEMENT – Enhance and diversify fundraising efforts to ensure long-term financial sustainability and growth
Objective 4.1 Cultivate lasting relationships with donors through personalized engagement and routine communication to increase donor retention and overall giving
Objective 4.2 Establish and promote a sustainable planned giving program to encourage long-term philanthropic support and strengthen the organization's financial future

GOAL 5. EMPLOYEE ENGAGEMENT – Foster a workplace culture that attracts top talent, enhances employee satisfaction, and supports professional growth to improve retention and organizational success.
Objective 5.1 Strengthen recruitment strategies by leveraging diverse hiring channels and employee referrals
Objective 5.2 Conduct annual employee satisfaction surveys to assess satisfaction and implement improvements
Objective 5.3 Establish clear career pathways with training, upskilling, and leadership development programs
Objective 5.4 Transition to performance-based salary increases

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

APPENDIX – DETAILED STRATEGIES

GOAL 1. ADAPTIVE PROGRAM DEVELOPMENT - Ensure responsiveness to evolving community needs by regularly assessing and adjusting programs to maximize impact.

Objective 1.1: Grow and/or downsize programs as needed in response to evolving community needs, data analysis, funding opportunities or lack thereof, and mission alignment

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Develop analytics and conduct regular program evaluations using 2-3 key performance indicators/metrics for each program, participation data and alignment to mission.	Redefining/implementing performance indicators for all programs/ depts. Key performance indicators as measured by PQI and reported on PQI reports	Board member representative(s) on PQI Committee	PQI Manager	Quarterly	Measures show successful impact through both quantitative and qualitative, such as self-sufficiency and housing stability.
Complete a program assessment, updated annually, to determine ratings in areas of mission alignment, strategic priorities, program effectiveness/ efficiency, and financial health. Utilize this analysis to determine program adaptations needed to include program closures, downsizing, or where to optimize allocation of resources	Quarterly review of select program, financial analysis (deep dive program evaluation)	PQI Committee	PQI Manager	Quarterly	Mission critical rating scale completed annually Develop an implementation plan based on results
Identify funding gaps and explore alternative revenue sources before making service reduction decisions	Quarterly review of program funding gaps and alternate resources (deep dive program evaluation)	Development Committee	Program Development & Quality Director	Quarterly	Review of funding gaps and alternate funding resources 1x per quarter deep dive analysis into one program Develop an implementation plan

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

Objective 1.2: Develop partnerships with service providers and funders to expand housing solutions within our service area

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Participate in regional coalitions and task forces focused on enabling housing solutions and homelessness prevention. (Examples: Faith in Action, Treasure Coast Homeless Services Council, Homeless and Housing Alliance)	Schedule of meetings	Development Committee	Operations Director HHO Director SC Development Manager	As opportunities arise	Tally of participation and engagement Connections and solutions made
Identify and pursue new joint funding opportunities, including grants and philanthropic investments, to increase Catholic Charities housing program capacity.	Research funding opportunities and feasibility of fit, submit applications	Development Committee	Program Development & Quality Director	As opportunities arise	Identify and pursue 2 housing related funding opportunities per year in partnership with other agencies.

Objective 1.3: Develop partnerships with service providers and businesses for enhanced service delivery, resource sharing, and in-kind donations

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Strengthen relationships with local organizations, businesses, and government agencies to enhance service delivery and resource sharing	Participation in collaboration events MOU's	Development Committee	Program Development & Quality Director Operations Director	As opportunities arise	MOU's for partnerships and resource sharing in place and implemented in a variety of programs (3 new or renewed per year) Increase (10% per year) in in-kind services/goods utilized, and documentation of such. Measure increase of in-kind services/good provided

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

GOAL 2. TECHNOLOGY ENHANCEMENT – Assess effectiveness and make upgrades to improve technology infrastructure to enhance efficiency, security, and service delivery across all programs

Objective 2.1: Ensure all agency computer hardware is compatible with the latest Windows operating system

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Upgrade/Replace all agency computers in phases to have all agency computers operating on the latest Windows operating system (Windows 11 Pro)	Inventory of all computers systems Replace incompatible Computers Budgeting to purchase Computers and equipment	Finance Committee	IT Support – Configuring, installing, and upgrading Computer network to latest Windows version	Phased annually	All agency computer equipment upgraded in phases to Windows 11 Pro

Objective 2.2: Ensure full utilization of paid software programs to maximize return on investment (Client Track, Salsa, SAGE INTAACT, Granthub, Therapy Notes, eKyros, Lawlogix, M-Files, Docusign, Constant Contact, Firespring – website, zoom)

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Evaluate usage, effectiveness, and alignment with organizational needs	Develop assessment tool on software usage, effectiveness, what’s working and what isn’t working	Board member representative(s) on PQI Committee	PQI Manager Finance Director Development Director	FY 2025-2026	Conduct meetings with appropriate staff and implementation plan for each software product/database. 3 per year, one software program each.

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

Identify underutilized features and determine training or process improvements to increase adoption	Completion and results of assessment tool mentioned above	Board member representative(s) on PQI Committee	PQI Manager Finance Director Development Director	FY 2025-2026	Conduct meeting and implementation plan for each software product/database. 3 per year, one software program each.
Develop and implement training sessions to ensure employees understand and fully utilize software capabilities.	Identify training opportunities and register pertinent staff Budget for training costs	Board member representative(s) on PQI Committee	PQI Manager Finance Director Development Director	FY 2026-2027	Successful training completion 1x per year for at least 1 software program
Regularly assess software costs and usage to ensure software continues to meet the organization's evolving needs.	Redo assessment of use after implemented changes	Board member representative(s) on PQI Committee	PQI Manager Finance Director Development Director	FY 2027-2028	Results of assessment and course corrections taken

Objective 2.3: Cybersecurity enhancements and strengthening of data protection measures to safeguard sensitive client and agency information

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Implement advanced security tools such as new network switches, intrusion detection systems, and endpoint protection	Budget for costs of advanced security tools and updated switches.	Finance Committee	IT Support – Configuring, installing, and upgrading new tools and equipment	FY 2026-2027	Firewall has been upgraded to the newest model. Quote Req: IT will receive a quote for the new equipment. Once approved equipment will be ordered. Equipment Received. Equipment configured. Equipment is deployed and installed.
Ensure all software and systems are regularly updated with the latest security patches	The maintenance schedule is in place. Software updates and patches are checked, downloaded, and applied as	Finance Committee	IT Support Specialist	FY 2025-2027	Notification of update is received Update is verified on Manufacturer site and information on affected and resolved security stipulations are noted Update is scheduled for deployment no later

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

	they are made available. This is administered				than 3 weeks after release. This is to ensure that any bugs may be patched by manufacturer.
Develop and implement regular mandatory cybersecurity training for all employees	Implement training curriculum via KnowB4, through manually curated mock phishing emails to test the users awareness. Training videos sent to show how to spot malcommunications and how to properly dispose of and report these threats.	Finance Committee	IT Support Specialist	FY 2025-2027	Track training completion Campaigns are updated quarterly and run every two weeks. The campaigns are random and generated so that different types of phishing emails are sent out every 2 weeks.
Conduct phishing simulations and awareness campaigns to educate staff on recognizing cyber threats	Campaigns to run every two weeks, and the campaigns contents are updated every quarter.	Finance Committee	IT Support Specialist	FY 2025-2027	Results are emailed to IT Director after each campaign. Report includes vulnerabilities, information of those that failed and those that passed, along with the clicks that they made and how far the phishing email got.

GOAL 3. ENHANCED BRAND AWARENESS – Enhance brand awareness and marketing to increase support for Catholic Charities mission and services

Objective 3.1: Engage a branding consultant to assess our branding strategy and enhance organizational visibility and cohesive identify

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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Identify and hire a branding consultant to assess our branding strategy and develop a plan for improvement.	Develop a scope of work and contract Identify strengths, weaknesses and	Development Committee	Development Director PQI Director	FY 2025-26	Develop and implement branding strategy by FY end 2025-26. Increased brand recognition as measured by

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

	opportunities to improve visibility, messaging and communication guidelines.				engagement metrics.
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Objective 3.2: Develop compelling testimonials and impact stories to showcase Catholic Charities work and 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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Utilize compelling narratives, testimonials, and data-driven reports to demonstrate the tangible outcomes of donor contributions	Stakeholder feedback results Measures of branding effectiveness Budget for brand awareness activities (consultant?)	Development Committee	Development Director Program Development & Quality Director	Quarterly	Newly developed narratives, testimonials and data reports included in marketing materials, annual reports, social media, website news

Objective 3.3: Implement targeted campaigns (mail, email, and social media) to boost support 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 Committee)</i>	Staff and Role <i>(Staff and staff responsibilities)</i>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Create engaging quarterly emailed newsletters	Constant Contact marketing software Include message from CEO, upcoming events, program and ministry news, and donor/funder acknowledgements. Review marketing metrics and	Development Committee	Program Development & Quality Director Development Director	Quarterly	Quarterly newsletters emailed to donors, volunteers, staff – with positive feedback received. Metrics around opened emails, links clicked, growth in email mailing list/subscriptions. Website metrics Social media metrics Surveys to measure effects of marketing

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

	course correct when needed				messages and brand awareness
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GOAL 4. EXPAND DONOR BASE & ENGAGEMENT – Enhance and diversify fundraising efforts to ensure long-term financial sustainability and growth

Objective 4.1: Cultivate lasting relationships with donors through personalized engagement and routine communication to increase donor retention and overall giving

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>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Create multiple touchpoints, including one-on-one meetings, small group VIP dinners, and large events, to deepen donor involvement	Schedule donor meetings/events and track	Development Committee	Development Director	Annually	Number of donor engagement activities (meetings in group or one-on-one). Annual target 2 large events (annual gala, spring luncheon, candlelight concert), 2 small group dinners, and 10 one-on-one meetings.

Objective 4.2: Establish and promote a sustainable planned giving program to encourage long-term philanthropic support and strengthen the organization's financial future

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>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Develop a comprehensive planned giving strategy, including bequests, charitable trusts, annuities, and endowments	Written plan	Development Committee	Development Director	FY 2025-2026	Finalize a written plan outlining a planned giving strategy
Develop a targeted communication-education plan, educational materials and workshops to engage loyal donors, members, and supporters in discussions about legacy giving	Communications plan and outreach materials developed	Development Committee	Development Director	FY 2026-2027	Implementation of the targeted communication-education plan and development and sharing of marketing materials
Regularly evaluate and refine outreach strategies	Gather donor/stakeholder	Development	Development	FY 2027-2028	10% Increases in bequests, charitable trusts,

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

based on donor feedback and industry best practices	feedback	Committee	Director		annuities, and endowments.
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GOAL 5. EMPLOYEE ENGAGEMENT – Foster a workplace culture that attracts top talent, enhances employee satisfaction, and supports professional growth to improve retention and organizational success.

Objective 5.1: Strengthen recruitment strategies by leveraging diverse hiring channels and employee referrals

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>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>
Utilize multiple job boards, including industry-specific platforms and professional associations	List of job boards/platforms used for new job postings	Personnel Committee	Human Resources Director	Annually and as position become open	Job postings, list of platforms used
Partner with diversity-focused career organizations and job fairs	Schedule/list of job fairs	Personnel Committee	Human Resources Director	Annually and as job fair opportunities are available	List of participation with job fairs
Develop and maintain a talent pool database for future hiring needs	Maintain talent pool database	Personnel Committee	Human Resources Director	Developed 2025-26, maintained annually thereafter	Talent pool database/list

Objective 5.2: Conduct annual employee satisfaction surveys to assess satisfaction and implement improvements

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>	Timeline <i>(Expected date of completion)</i>	Key Success Indicators <i>(Accomplishments/ measurement vehicles demonstrating successful movement forward – both quantitative and qualitative)</i>

**CATHOLIC CHARITIES OF THE DIOCESE OF PALM BEACH
STRATEGIC PLAN 2025 - 2028**

Conduct regular employee engagement surveys to assess satisfaction and implement improvements	Survey Monkey Software	Personnel Committee	Human Resources Director	Annually	Surveys completed, minimum of 70% completed survey, suggestions reviewed by PQI Committee/Leadership and improvements made as a result
Foster a positive work environment through open communication, recognition programs, and work-life balance initiatives	Video messages recorded via zoom, shared with constant contact, CQI team to oversee employee of the quarter and work life balance initiatives	Personnel Committee	Human Resources Director	Quarterly	Every other month “all staff communication videos” completed and shared Employee of the quarter program

Objective 5.3: Establish clear career pathways with training, upskilling, and leadership development programs

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>
Implement annual training and upskilling opportunities to staff	Annual training calendar Identification of training opportunities needed based on performance review Budgeted and implementing training	Personnel Committee	Human Resources Director PQI Manager Volunteer & Training Coordinator	Annually	Tracking of training completion
Offer leadership workshops to include soft skills training, decision-making, conflict resolution, and strategic thinking	Identification of training opportunities budgeted and implemented	Personnel Committee	Human Resources Director Volunteer & Training Coordinator	Annually	Tracking of training completion
Provide stretch assignments, cross-functional projects, and leadership shadowing experiences		Personnel Committee	Human Resources Director Program Directors	Annually	Documented via performance appraisals and career development plans

Objective 5.4: Transition to performance-based salary increases

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

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>
Define clear performance metrics and evaluation criteria aligned with organizational goals	Revised performance appraisal form	Personnel Committee	Human Resources Director	FY 2025-26	Revised and approved performance appraisal form in year one, implemented in year two and three
Establish a standardized rating system to assess employee contributions objectively	Revised/improved rating system	Personnel Committee	Human Resources Director	FY 2026-27	Revised and approved performance appraisal form includes new standardized rating system
Clearly communicate the new structure to employees through training sessions, FAQs, and leadership engagement	Training developed and held	Personnel Committee	Human Resources Director	FY 2027-28	Training product/PPTs developed and communicated
Train supervisors on conducting fair and effective performance evaluations and standardize review practices across departments to ensure consistency and fairness	Trainings developed/held	Personnel Committee	Human Resources Director Volunteer & Training Coordinator	FY 2027-28	Tracking of training completion
Make necessary refinements based on feedback from employees and leadership	Gather feedback on new process through a variety of methods, report, and make course corrections as needed	Personnel Committee	Human Resources Director	FY 2027-28	Feedback gathered and acted upon