



**Italian Catholic
Federation**

Strategic Plan 2018-2020

**Part of a Yearly Strategic
Change Management System Cycle**

Italian Catholic Federation

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INTRODUCTION

In 2013, the Central Council of the Italian Catholic Federation voted to create a strategic plan to guide the Federation into the future with a clear vision and a set of broadly defined goals and objectives. The first version of the plan guided the Federation from 2014-2017. The document below represents an update and revision to this original plan with ideas and conclusions gathered from discussion, data and evaluations of the first version of this plan. The Central Council adopted it on June 10, 2017. It will be used to guide the Central Council and leadership of the Federation as it creates operational plans and procedures for the next several years.

What This Plan Is and Is Not

- This strategic plan broadly defines the intended journey of the Federation, not the specific steps.
- This strategic plan is a living document that will change over time. Actions that we believe are valid to pursue today may prove to be not feasible. The intent is to have committees analyze the various proposed guidelines and report their actions and conclusions to the Central Council.
- The specific steps will be laid out in the one-year operating plan that will follow the approval of the strategic plan.
- The strategies and actions in the Plan will be implemented with the necessary due diligence to avoid unintended consequences.
- Every strategy and action is focused on achieving the vision of the Federation.
- For this strategic plan to be effective, it is essential that those voting on its approval fully commit to supporting it, even if individuals don't agree with a few specific items.

ICF Mission Statement (adopted 2014)

Our Mission: Through families and fellowship, the Italian Catholic Federation promotes and supports the Catholic faith and its values, encourages apostolic and charitable works, and celebrates the heritages of our communities.

Marketing Slogan: One Faith, Many Cultures

KEY SUCCESS MEASURES (KSM)

Our Key Success Measures are our outcome measures of success. They measure how effectively the Italian Catholic Federation is achieving its mission and goals on a year-by-year basis. It is our scoreboard for continuous improvement of success.

Measurement Areas

I. Membership by 2020

1. *Increase membership by 30% (10% per year)*
2. *Open nine new branches (3 per year)*
3. *Increase retention of current members to 95%*
4. *Increase younger members (18-60) by 15%*
5. *Increase Family Memberships by 100 families*
7. *Don't close more than 2 branches per year*
8. *Ensure that 50% of members from closed branches move to other branches*
9. *Ensures that every branch has an Amici de Coure (buddy program) and membership chairperson*

II. Financial by 2020

1. *Cover 90% of publishing costs of The Bollettino through revenue sources (advertising, sponsorships, and dues).*

2. *Continue make annual convention profitable*
3. *Increase per capita income by 15%*
4. *Increase non-per capita income by 5%*

III. Leadership by 2020

1. *Provide one online leadership training per quarter*
2. *Create an evaluation process to assist new leaders*
3. *Evaluate structure and size of Central Council*
4. *Establish leadership mentorship program and guidelines for all officers*
5. *Ensure that deputies and/or Central Council members visit branches twice per year and strengthen Deputy Program*
6. *Follow ICF by-law that a district or branch president shall serve more than three years consecutively*
7. *Evaluate ICF by-laws and Central Council statutes*

IV. Community Connections by 2020

1. *Stipulate that district officers communicate with bishops and pastors at least once per year*
2. *Establish a process and guidelines to strengthen communication between ICF and diocese and parishes.*
3. *Contact 6 non-ICF parishes a year to promote ICF*
4. *Engage other parish and community organizations in ICF activities*
5. *Increase involvement in community activities*
6. *Engage chaplains in new branches*

CORE STRATEGIES

Our core strategies are the primary means and methods we will use to move the ICF from today to our vision for the year 2020.

Core Strategies are the primary ways we “close the gap” between today and our desired Future Vision. Thus, they are also the “glue” and “organizing framework” for all parts of the organization. They replace the obsolete concept of separate department goals. These are those goals; the same for each department. Although we recognize all core strategies are intertwined, our level of effort will be focused in order of the below hierarchy.

1. Core Strategy #1: Membership Growth and Retention (including marketing)

We will grow and maintain our membership base through leadership training and marketing.

3. Core Strategy #2: Leadership

We will evaluate and revise leadership structure in the ICF so that leadership is developed and encouraged among its members and so that new leadership is encouraged and developed.

3. Core Strategy #3: Community Connections

We create connections between the ICF, our parishes, and communities; these connections are part of our commitment to apostolic and charitable work.

4. Core Strategy #4: Finances

We will balance our budgets at all levels so that the ICF is no longer financing its operations through investment returns.

CORE STRATEGY #1

Membership Growth and Retention (including marketing)

We will grow and maintain our membership base through leadership training and marketing.

How Is It Changing?

| From | | To |
|------------------------------------|---|--|
| New members leaving within 5 years | ➔ | New members becoming lifelong members (Retention at 96%) |
| Inability to attract new members | ➔ | New members grow by 10% per year |
| Opening 3 new branches per year | ➔ | Continue to open 3 new branches per year |

2018 - 2020 Top Priority Actions

- 1. Fully implement Amici de Cour program that creates hospitable and welcoming branches.*
- 2. Create marketing plan to attract new members.*
- 3. Provide more support locally for Expansion program.*

CORE STRATEGY #2

Leadership

We will evaluate and revise leadership structure in the ICF so that leadership is developed and encouraged among its members and so that new leadership is encouraged and developed.

How Is It Changing?

| From | | To |
|--|---|---|
| Branch offices often in same hands beyond established term limits. | ➔ | New officers take office as established in by-laws. |
| Current leadership structure has not been evaluated in years. | ➔ | Evaluation and revision of current leadership structure at all levels to meet needs of members. |
| Weak Deputy Program | ➔ | Deputy Program running as designed |

2018 - 2020 Top Priority Actions

- 1. Expand leadership training that promotes new leadership (both face-to-face and online).*
- 2. Evaluate and revise current leadership structure from Central Council to branches.*
- 3. Continue to evaluate and revise current Deputy Program.*

CORE STRATEGY #3

Community Connections

We create connections between the ICF, our parishes, and communities; these connections are part of our commitment to apostolic and charitable work.

How Is It Changing?

| From | | To |
|---|---|--|
| ICF is not well known in all its parishes. | ➔ | ICF is an integral part of parish life. |
| ICF is not well known in communities. | ➔ | ICF is an integral part of community. |
| ICF's purpose is not clear with pastors and clergy. | ➔ | Pastor and clergy understand purpose of ICF and see it as an integral part of parish life. |

2018 - 2020 Top Priority Actions

- 1. Promote ICF events in parish and community publications.*
- 2. Create regular communication with pastor and clergy, including chaplain.*
- 3. Use Expansion Committee materials to promote and educate new and current branch pastors about ICF.*
- 4. Use social media and webpages to promote local branch activities within parish and community.*

CORE STRATEGY #4

Finances

We will balance our budgets at all levels so that the ICF is no longer financing its operations through investment returns.

How Is It Changing?

| From | | To |
|---|---|--|
| ICF Central Council budget is drawing on investments to balance budget | ➔ | ICF income is enough to cover expenses |
| <i>Bollettino</i> is financially unsound (expenses exceed income and per capita). | ➔ | <i>Bollettino</i> financially sound |
| Costs of meetings, mailings and telephone are stable. | ➔ | Maintain efficient use of technology (emailing, online meetings, online drop boxes) reduces cost of mailings, etc. |

2018 - 2020 Top Priority Actions

1. *Increase per capita and dues to meet services offered to members.*
2. *Develop and promote online version of The Bollettino and reduce need for printed version of paper.*
3. *Continue to increase use of online meetings, using services such as Go-to-Meeting.*

ACTION PLANS

To reach our key success measures, the ICF, under the direction of the Central Council, will implement the following action plans. Some actions will be started in the first year, others in subsequent years. These actions require a close working relationship between Central Council committees, districts, and local branches. The Task Force subcommittee on Strategic Planning will monitor the progress of each of these tasks, offer assistance to responsible persons, and recommend corrective action when necessary.

Overall Responsible: Task Force

| KSM Areas | Actions to Develop Target Measures and Baseline Data | Who is Responsible | Date Due |
|----------------------------|---|---|-----------------|
| | <i>Membership Growth and Retention (including marketing)</i> | | |
| 1. Membership | Ensure Amici di Cuore (buddy system) to welcome and mentor new members is in most branches along with Membership Chair. | <i>Membership Committee, Local Branches</i> | <i>2018</i> |
| 2. Membership & Leadership | Encourage a positive attitude from all members: <ul style="list-style-type: none"> • Don't make it personal • Encourage engagement of sentinel to maintain a positive environment • Involve new members in committees and events as soon as possible | Task Force Committee | <i>On-going</i> |
| 3. Membership | Educate potential members on what the ICF is about by providing literature. | <i>Membership Committee, Local Branches</i> | <i>On-going</i> |
| 4. Membership & Apostolate | Get support of pastor and parish by seeking out and helping with their needs. | <i>Apostolic Committee, Local Branches</i> | <i>On-going</i> |
| 5. Membership | Promote ICF by having membership drives targeting specific parish constituencies, such as RCIA, Knights of Columbus, families . . . | <i>Membership Committee, Local Branches</i> | <i>On-going</i> |

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| 6. Membership | Create a branding initiative that creates a consistent and modern image of the Federation: promotional video, parish bulletin blurbs, newspaper ads, and other promotional material, including an updated logo. | <i>Membership Committees & Task Force</i> | <i>2018</i> |
| 7. Membership | Create a membership perks program (such as trips, discount cards, etc). | <i>Membership Committee</i> | <i>2018</i> |
| 8. Membership | Create young adult programs and initiatives for college-age students. | <i>Membership Committee & Task Force</i> | <i>On-going</i> |
| 9. Membership | Promote Seminarian support (such as Seminarian Providenza Fund) in marketing. Find spokesperson for Seminarian Providenza Fund and ICF. | <i>Membership Committee</i> | <i>On-going</i> |
| 10. Membership | Encourage and promote membership at all ICF events at branch level (cookie sales, fundraiser dinners, spiritual and apostolate events). | <i>Membership Committee and Branches</i> | <i>On-going</i> |

| KSM Areas | Actions to Develop Target Measures and Baseline Data | Who is Responsible | Date Due |
|------------------|---|-----------------------------------|-----------------|
| | <i>Financial</i> | | |
| 1. Financial | <i>Bollettino:</i> <ul style="list-style-type: none"> • Reduce cost of <i>Bollettino</i> or increase revenue • Increase online only subscription to <i>Bollettino</i> • Increase advertising revenue | <i>Public Relations Committee</i> | <i>2019</i> |

| | | | |
|--------------|---|--|---------------------|
| 2. Financial | Maintain profitability of convention. | <i>Convention Committee</i> | <i>On-going</i> |
| 3. Financial | Increase advertising revenue of the convention book. | <i>Convention Committee</i> | <i>On-going</i> |
| 4. Financial | Increase contributions to Seminarian Providenza Fund. | <i>Apostolic Committee</i> | <i>On-going</i> |
| 5. Financial | Increase per capita and dues so that they meet membership services. | <i>Financial and Executive Committee</i> | <i>2018-ongoing</i> |
| 6. Financial | Increase transparency of ICF finances and what dues go for. | <i>Financial and Executive Committee</i> | <i>2019</i> |

| KSM Areas | Actions to Develop Target Measures and Baseline Data | Who is Responsible | Date Due |
|------------------|--|-----------------------------|-----------------|
| | <i>Leadership</i> | | |
| 1. Leadership | Create and promote a leadership program at all levels of the ICF: <ul style="list-style-type: none"> • Guidelines for running a meeting • Training for how to create hospitality within a branch • Training on how to develop new leadership for now and in the future at all levels. | <i>Task Force Committee</i> | <i>2018</i> |

| | | | |
|----------------------------|---|--|----------------------------|
| 2. Leadership & Finance | <p>Form a committee to evaluate leadership structure:</p> <ul style="list-style-type: none"> • Committee consists of Central Council members, district presidents, and branch members. • Conduct surveys about satisfaction with current leadership structure. • Conduct focus group sessions about satisfaction with current leadership structure and to gather ideas for change. | <i>Task Force and Rituals & By-Laws Committees</i> | <i>2018</i> |
| 3. Leadership & Membership | <p>Continue to evaluate and revise current Deputy Program:</p> <ul style="list-style-type: none"> • “Close the Loop” in communication between branches, districts, and Central Council. • Make recommended changes garnered from discussions with deputies and membership, such as “mentor” name change. • Continue to work with deputies and members to evaluate and make recommendations for revision of current Deputy Program. | <i>1st Vice-President</i> | <i>2018 & on-going</i> |
| 4. Leadership | <p>Improve current deputy program</p> <ul style="list-style-type: none"> • Create subcommittees in Deputy program. • Quarterly visits to branches. • Remote annual CC visits with additional Skype visits. | <i>1st Vice-President</i> | <i>On-going</i> |

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| 5. Leadership | Encourage officer term limits at district and branch level according to ICF by-laws. <ul style="list-style-type: none"> • Terms limits must be known when someone takes office. • Make it okay to step down • Encourage new leadership to take over. | <i>Deputy Program (1st Vice-President)</i> | <i>On-going</i> |
| 6. Leadership | Revise and promote officer training presentations (PPT) so they are available to all members. Use website . . . | <i>Task Force & Expansion</i> | <i>2018</i> |
| 7. Leadership and Membership | Encourage each branch to have a Public Relations Committee as per by-laws. | <i>Task Force</i> | <i>On-going</i> |
| 8. Membership | Create Questionnaires about what branches are doing to promote ICF and to further the ideals and aims of Federation. | <i>Task Force</i> | <i>2018</i> |

| KSM Areas | Actions to Develop Target Measures and Baseline Data | Who is Responsible | Date Due |
|---|---|---|-----------------|
| | <i>Community Connections</i> | | |
| 1. Community Connections, Leadership, Financial, Membership | Invite and welcome members of our parishes and communities to ICF and its events through: <ul style="list-style-type: none"> • Parish bulletins • Diocesan newspapers • Local newspapers • Announcements at Masses • Brochures at parish and community events. | <i>Membership Committee, District, Local Branches</i> | <i>2018</i> |
| 2. Community Connections, Leadership, Membership | Invite other parish ministries to our dinner meetings and special events, such as St. Joseph's table, Bishop's Day, picnics, etc. | <i>Membership Committee, Local Branches</i> | <i>2017</i> |

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|--------------------------------------|---|---|-----------------|
| 3. Community Connections, Leadership | <p>Create better connections with pastors and chaplains</p> <ul style="list-style-type: none"> • Review and learn the roles of pastors and chaplains in districts and branches. • Make ICF information for pastors and chaplains accessible on website. • Engage chaplain in district and branch by giving him a purpose and holding a Chaplains Night. • Develop regular lines of communication with pastor. | District, branches, and Apostolate | 2018 |
| 4. Community Connections | <p>Improve Internet presence</p> <ul style="list-style-type: none"> • Have convention and district workshops recorded and placed online. • Offer online version of all reports and forms (fillable and able to be emailed to office). • Continue to offer templates for branch and district websites. | <i>Public Relations Committee, Local Branches</i> | 2018 |
| 5. Community Connections | Participate in charitable events within the community. | <i>Apostolic Committee, Local Branches</i> | <i>On-going</i> |

COMPREHENSIVE IMPLEMENTATION MAP

In order to meet the goals of this strategic plan over 3 years, the Federation will need to follow a calendar that insures action and completion of tasks.

Strategic Change Comprehensive Map

| Date | Meetings |
|----------------------------|--|
| May & June 2017 | <ul style="list-style-type: none"> • Task Force & Executive: Review and Revise Strategic Plan (SP) |
| June 10, 2017 | <ul style="list-style-type: none"> • Central Council: Review, Revise, and Adopt Strategic Plan (SP). |
| July-August 2017 | <ul style="list-style-type: none"> • Task Force: Publicizes SP to members & prepares final draft for publication and convention presentation |
| September 2017 | <ul style="list-style-type: none"> • Present Strategic Plan at 2017 Convention |
| October of each year | <ul style="list-style-type: none"> • CC Committees: Meet to discuss how they will implement SP actions for the year and make presentation at Central Council meeting |
| October – May of each year | <ul style="list-style-type: none"> • SP Subcommittee: Monitors progress of action plan • CC Committees: Work with districts and local branches on SP implementation • CC Committees: Take corrective actions to be sure SP actions are on track for completion this year and make report to CC about progress |
| May of each year | <ul style="list-style-type: none"> • Task Force/Central Council/Leaders of ICF: <ul style="list-style-type: none"> ○ Meet to review progress of SP ○ Recommend corrective action ○ Revise SP as necessary |
| June – August of year | <ul style="list-style-type: none"> • Task Force: Report to CC about progress of SP • CC Committee: Work with districts and local branches on SP implementation |
| September of each year | <ul style="list-style-type: none"> • Task Force: Reports to convention delegates on progress of SP |

Task Force Committee – 2020

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