CHRIST THE KING PASSIONIST RETREAT CENTER

STRATEGIC PLAN

Adopted : October 8, 2014

FY 2015

FOREWARD

Dear Sisters and Brothers in Christ,

Christ the King Passionist Retreat Center looks to its future with a large measure of faith and trust. Someone in the field of strategic planning insists that fear and discomfort are an essential part of strategy making. "In fact," he says, "if you are entirely comfortable with your strategy, there's a strong chance it isn't very good." Our 2014 Strategic Plan does stretch us beyond where we are but not beyond our well founded trust in God's promise to bless the work of our hands. By God's grace, our Mission urges us on.

This plan comes at a time when our Retreat Center faces some specific challenges that demand our attention. In the past few years our financial situation has been a concern. At the same time, the number of Passionist preached retreats has diminished. Our overall goal is to increase retreat attendance and to stabilize our financial situation. This will ensure that we are faithful to our mission and stand on a firm foundation.

As you review this document, bear in mind that it is not a plan that exists only on paper. It is the movement of the Spirit that has guided our Passionist Retreat ministry since the time of our Founder, St. Paul of the Cross. He gathered companions to work in the name of Christ to proclaim the Gospel, with the conviction that the Passion of Christ is the clearest sign of God's love for us. Our future is dedicated to this mission and our every effort is to be faithful to our call. This vision which will guide our efforts over the next several years is the embodiment of our legacy from the past and our faith in the future.

I am grateful for the generous efforts of the Board which have gone into this strategic plan. And I am confident that our dedicated staff will respond with vigor to the challenges that lie ahead.

May God bless us and all who come to Christ the King Passionist Retreat Center.

(Signature)

Fr. Jim Strommer, C.P.

EXECUTIVE SUMMARY

The Christ the King Passionist Retreat Center is at an exciting and expansive stage of development. Founded in 1950, the Retreat Center's goal is to provide to all who come, a spiritual atmosphere of warmth, welcome and openness in a tranquil and reflective environment. When Christ the King Passionist Retreat Center released its first five-year strategic plan several years ago, it identified specific goals intended to make the transition to a new governance structure and provide a direction for viable retreat programs and facility improvements. Much has changed since then, and through the years key lessons were learned that are reflected in this updated strategic plan.

The process leading to this new strategic plan was launched over a year ago at a full Board Retreat where the critical need for a renewed roadmap was recognized. Identified first were the top key issues facing the Retreat Center today: Achieving Financial Stability; Broadening Access to the Center; and finally, Communicating who we are as a Passionist Retreat Center. To guide its next stage of growth, an ad-hoc Committee of the Retreat Center Board led by a volunteer organization consultant, engaged in an extensive planning process laying the groundwork for the development of this strategic plan. From the Board's early charge, the ad hoc Committee further delineated goal areas and assigned each member to define a vision, specify goals and prepare performance measures to deliver that vision.

This strategic plan provides a clear blueprint for the Christ the King Passionist Retreat Center pointing the way to build on our strengths, and growing the Passionist Charism through the operation of a viable, meaningful and model retreat center for the diocese, our retreatants, and guests. It outlines a focused direction for maximizing our Retreat Center's effectiveness, with a look to sustaining the center for future retreatants.

Over the next ten years the Center will focus on the following key vision areas:

Spiritual Enrichment – to provide a vital and effective retreat ministry

Communications – to increase the number of guests utilizing the Retreat Center

Fundraising – to focus on our donors recognizing that our value is as strong as the experiences we provide

Finance – to preserve a financially solvent facility with a positive cash flow and healthy monetary reserve

Environment and Maintenance – to ensure sustainable enjoyment of the facilities through investment and maintenance

Information Technology and Data Management – to respond to the up-to-date information needs of all our users, and

Organizational Leadership – to ensure the Retreat Center moves toward prosperity with a plan for growth and a relevant program.

As you read the plan's detailed discussion of our Current Reality, the Factors Driving Change and the Statements of Desired Outcomes for each of the above areas, it is clear that this Strategic Plan is a living document. It is not intended to sit on a shelf, but rather it will function as a measuring stick for our annual budget reviews, committee actions and staff work programs.'

This Strategic Plan offers a roadmap to capitalize on our strengths and potential to sustain a vibrant retreat experience for years to come. We will be an institution defined by our hallmarks:

- Grounded in the Passionist Charism
- Excellent hospitality
- Serene environment
- Attraction for diverse populations
- Sustained financial solvency
- A true "Jewel of the Diocese".

As we move forward, we are committed to putting the Christ the King Passionist Retreat Center Strategic Plan into action and look forward to serving as guardians and caretakers of this unique spiritual facility and its programs for today and tomorrow.

Sincerely in Christ,

Deacon Richard Koppes, Board Chair
Christ the King Passionist Retreat Center

Ad Hoc Strategic Plan Committee:

Dennis Gorsuch, Chair
Charlene Cardenas
Rae James
Richard Koppes
David Lovenvirth
Ken MacDonald
Mary Myrick

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SPIRITUAL ENRICHMENT

Christ the King Passionist Retreat Center has as its primary ministry a commitment to provide weekend preached retreats to parish based groups of men and women in Sacramento and surrounding dioceses.

1. Statement of Current Reality:

    A. Christ the King is recognized as a house of prayer and provides an atmosphere of quiet and reflection for all participants and visitors.

    B. We provide parish based men's and women's preached retreats in the Passionist tradition sixteen weeks out of the year.

    C. We provide or sponsor lectures and study programs throughout the year as well as seasonal or special theme retreats and days of prayer.

    D. We are a place of hospitality for hosted programs, 12-step meetings and regular gatherings for prayer and study.

    E. Our ministry team is diverse and represents vowed Passionists, diocesan deacons and laity.

    F. Among the retreat center staff there is a sense of belonging to the Passionist ministry.

    G. There is a growing awareness of our collective Passionist identity but specific formation in the Passionist Charism has been minimal.

2. Factors Driving Change:

    A. There are a diminishing number of vowed Passionists available to staff the Retreat Center.

    B. There is a growing acceptance among retreatants of a diversified staff.

    C. There are several new opportunities for charism formation through the Province Office of Mission Effectiveness and the Catholic Theological Union.

    D. Our Passionist Charism is extremely attractive.

    E. The role of women in the Church is expanding.

    F. There are configuration resources to provide an international perspective.

3. <u>Statements of Desired Outcome:</u>

A. Christ the King Passionist Retreat Center will continue to provide a vital and effective retreat ministry consistent with our history of parish-based weekend preached retreats for men and women.

B. The concept of "Passionist Presence" will be recognized as a partnership between various members of the Passionist family.

C. We will have a greater outreach to under-represented groups such as youth, Hispanic, veterans, etc. with a special concern for those marginalized by the church and society.

D. The retreat center Board and staff will deepen their commitment to continual formation in the Passionist Charism and readiness for ministry.

E. The next generation of ministry personnel will be more diverse and inclusive.

SPIRITUAL ENRICHMENT VISION

IMPLEMENATION GOALS

1. By July 1, 2015, there is a focus on formation in the Passionist Charism at the annual Board and staff retreats.

2. By July 1, 2016, 10% of all Passionist retreat weekends is focused on under-represented interests groups, such as, youth, seniors, veterans and those who speak English as their second language.

3. By July 1, 2017, Passionist retreat weekends comprises 60% of all available retreat weekends.

Christ the King Passionist Retreat Center
Strategic Plan

COMMUNICATIONS

Christ the King Passionist Retreat Center is known as the jewel of the Diocese of Sacramento. It serves a vital role in conveying the message of the Gospel in keeping with the charism of the Passionists.

1. <u>The Current Reality</u>

   A. Christ the King currently draws on the talents of the Passionists, Board members, staff, volunteers and retreatants to communicate the mission and the vision of the Retreat Center.

   B. We utilize print and social media, radio and various forms of technology to communicate the messages of the Retreat Center.

2. <u>Factors Driving Change</u>

   A. There is increased competition in the marketplace for retreatants.

   B. There is a need to seek out and serve an increasingly diverse marketplace.

   C. The retreat center's long time retreatants are aging.

   D. We must attract a younger population that may be seeking a spiritual home and/or sanctuary.

   E. The Passionist Community desires to share the Passionist Charism with a wider audience

3. <u>Statements of Desired Outcomes:</u>

   A. There will be an increasing number of guests utilizing the gifts of Christ the King.

   B. All Passionist retreats and programs will reflect the diversity of the marketplace.

   C. The Retreat Center will retain a communications professional.

   D. We will serve the rural areas of the diocese by offering a "Virtual Retreat Center" and "suit casing" Passionist programs and retreats to those guests unable to come to Sacramento.

   E. We will increase our presence in the diocese with the utilization of state of the art technology.

Christ the King Passionist Retreat Center
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COMMUNICATIONS VISION

IMPLEMENTATION GOALS

1. By July 1, 2015 overall attendance has increased 10% from the previous year.
2. By July 1, 2015, the Board's Communication Committee has developed a communications policy and action plan for adoption by the full Board in August 2015.
3. By July 1, 2016, attendance has increased by 20% for Passionists retreats from the FY 2015-2016 retreat year.
4. By July 1, 2016, Christ the King has retained a part-time communications specialist.

Christ the King Passionist Retreat Center
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FUNDRAISING VISION

Christ the King Passionist Retreat Center strives to function in a natural flow of giving and receiving money from all sources: fundraising, retreats, week day conferences, and professional collaborations. Our emphasis in development is one of focusing on our donors, recognizing that our value as a retreat center is as strong as the experiences we provide onsite. Our ministry is key to our fundraising.

1. <u>Statement of Current Reality:</u>

    A. Christ the King needs to develop a confident relationship with the practice of soliciting money from viable funding sources.

    B. In order to ensure financial sustainability we need to seek new donors and ensure we are communicating our value to current donors.

2. <u>Factors Driving Change</u>:

    A. Fundraising is being called upon to bridge a financial gap between discretionary operating income and monies needed to cover ongoing program delivery costs.

    B. Our fundraising success is inextricably tied to our core operational success.

    C. Our survival as a vibrant and relevant center of retreat is at risk without a concerted effort to adjust our current operating model.

3. <u>Statements of Desired Outcomes:</u>

    A. We will develop a diverse and thriving fundraising culture which will support an equally diverse and thriving retreat center; with responsive operational staff; a viable business model and a sustainable organizational culture.

    B. The Christ the King fundraising unit will be part of senior management and will contribute to the organizational vision.

    C. We will collaborate with donors through mutual respect and full disclosure.

    D. Donors will come to us and ask how they can give.

    E. Christ the King will establish and maintain a strong partnership with the Diocese of Sacramento to identify and pursue realistic fundraising sources.

FUNDRAISING VISION

IMPLEMENTATION GOALS

1. By October 2014, the Board adopts a one-year fundraising scope of work for the upcoming fiscal year detailing the direction, tasks, and action steps for a strong successful fundraising program. This document leads to a formal five year fundraising plan.

2. By July 1, 2015, after adoption by the Board of a sustainable fundraising plan, the development director collaborates with staff, the Board, and volunteers detailing the raising of $250,000 for the next fiscal year, based on a sustainable and diverse array of funding programs.

3. By July 1, 2017, Christ the King has a new $250,000 unrestricted endowment fund and no longer operates on a deficit operational budget.

4. By July 1, 2020, Christ the King fundraising department is an integral part of the larger organizational structure raising an average of $1 million a year.

FINANCE VISION

The Christ the King Passionist Retreat Center is preserved for retreatants and visitors as a financially solvent facility that embraces and promotes the financial values of credibility, accuracy, and reliability.

I. Statement of Current Reality:

A. Christ the King is facing daunting financial deficits; however that underperformance is balanced by the love of its Board, staff and retreatants to do what it takes to ensure its solvency today, and into the future.

B. A recent substantial donation to Christ the King has provided much needed financial relief for the current year.

2. Factors Driving Change:

A. The Board has voted to take financial actions which recognize a large current donation, and a conservative future approach.

B. The Board has requested a full field audit which should be completed by calendar year end.

C. A full-time Development Director has been hired to aggressively pursue much needed fundraising.

3. Statement of Desired Outcomes:

Christ the King will operate with a comfortable, positive operating cash flow and a healthy monetary reserve for facility maintenance, capital expenditures and expansion on an ongoing basis.

FINANCE VISION

IMPLEMENTATION GOALS

1. By July 1, 2017 there is no further need to draw from a letter of credit and repayment of all past draws commences.

2. By July 1, 2017 hosted retreats comprises 40% of all retreat activity.

3. By July 1, 2017, Passionist retreat attendance fees support all direct costs of conducting a retreat. Retreats pay for themselves.

4. By July 1, 2017 fundraising activity supports all overhead costs.

5. By July 1, 2018 all high priority items on the FY 2014-2015 capital budget are purchased and/or installed.

6. By July 1, 2020, Christ the King has a healthy reserve of no less than 10% of its annual operating expenses, not including the Jess Wilson Fund

7. By July 1, 2020, the annual operation budget reflects positive cash flows and the Provincial letter of credit is repaid.

8. By July 1, 2025 Christ the King operates a second facility on its grounds, which generates positive income and contributes to the fulfillment of its mission. The new facility is 50% funded at the time of its ground-breaking and net Income from the new facility is used to support a reserve fund for future program expansion.

ENVIRONMENT AND MAINTENANCE

The environment at Christ the King Passionist Retreat Center and its maintenance is critical to the enjoyment of all who use its facilities and its sustainability for future retreatants, guests and employees.

1. Statements of Current Reality:

   A. The current buildings are in acceptable condition.

   B. Maintenance funding is reserved for repairs, however it is inadequate and due to deferred maintenance and the age and number of our facilities, unforeseen emergencies are common.

   C. The Christ the King Board has adopted a capitol improvement budget with prioritized line items for expenditure from the maintenance reserve fund.

   D. We are reliant on donations, some of which must be major, to handle larger issues.

   E. Security of the property, including lighting and access, is inadequate and needs to be enhanced.

   F. The kitchen is critical to Christ the King's operation however its equipment is aging.

   G. Christ the King faces concerns regarding the diminishing depth of the well-used to keep the property irrigated.

2. Factors Driving Change:

   A. Environment and maintenance concerns are the impetus for stringent prioritization of capital improvements within the Retreat Center.

   B. The physical safety of guests and staff at Christ the King is a primary concern.

   C. The buildings are aging and in constant need of maintenance and repair.

   D. The front gate needs to be repaired or replaced in an effort to limit access to only those requiring the services of the Retreat Center.
   E. Ceiling tile replacement in the chapel is urgent due to potential harm to visitors.

F. Compliance with state food service regulation requires the eventual replacement of the floor in the kitchen.

G. For insurance purposes there is a need for regular schedule of tree trimming and outdoor maintenance.

3. Statements of Desired Outcomes:

A. The parking lot will be updated and access to our attractive grounds will be secured by functioning gate.

B. The kitchen will be a modern facility that meets all state and local code requirements.

C. There is an annual review of deferred maintenance and capital projects to be considered in the development of the retreat center's budget.

D. Based on a future scope and potential space plan, administrative offices will be centralized and optimized.

E. The possibility of the financing construction and development of a senior assisted living building on the current grounds will be researched and evaluated for financial feasibility.

F. Christ the King assets will be transferred to the Board and all statuary and designated artwork will remain with the Passionist Community.

ENVIRONMENT AND MAINTENANCE VISION

IMPLEMENTATION GOALS

1. By July 1, 2016, the kitchen has a new floor.
2. By July 1, 2016, the kitchen has new cooking and refrigeration equipment.
3. By July 1, 2016, a comprehensive office / facility space and land use evaluation of the Christ the King facility has been submitted to the Board for review and approval.
4. By July 1, 2017, all pertinent Christ the King assets are transferred to the Christ the King Board.
5. By July 1, 2017 the parking lot has been repaved and the front gate has a satisfactory security solution.

INFORMATION TECHNOLOGY AND DATA MANAGEMENT

As we move into the future, Christ the King Retreat Center will meet the needs of our retreatants by providing access to our programs and opportunities using up-to-date methods of electronic communication. The addition of updated equipment in combination with employee training will better manage our data, and allow Christ the King to respond to the information needs of our users in a timely and effective manner.

1. Statements of Reality:

   A. Phone systems have not been updated to meet the needs of the Retreat Center ministry.

   B. Security and privacy of our data is completely ensured in our current system.

   C. Wi-fi accessibility is inconsistent; there is a need for additional equipment to ensure performance in both the Chapel and Holy Cross Buildings.

   D. Donor Perfect is the data base used to track donors, fundraising activities and manage events, and Data Pro is the accounting data base system supported by the Holy Cross Province.

   E. Sound and projection equipment in the Quinn, Parsons rooms and Chapel are more than adequate. Sound and projection needs in other areas of the retreat center need to be evaluated.

2. Factors Driving Change:

   A. The addition of new part-time and volunteer positions requires an increase in internet access and computing resources.

   B. In order to serve the computing needs of our many visitors and guests, wireless access in both the Chapel and Holy Cross buildings requires additional equipment and updating.

   C. The sound system in the dining room is inadequate.

3. Statements of Desired Outcomes:

A. There will be an annual budget for IT that includes equipment and software upgrades as well as provisions for additional employees and volunteers.
B. IT internal policy and procedures will be developed which provide the testing of equipment for security and privacy as well as the determination of upgrade protocols.

C. To ensure privacy and security, a policy will be developed and implemented which will provide for an annual review by an outside source.

D. All employees will be trained in order to gain the IT skills required for their position.

INFORMATION TECHNOLOGY AND DATA MANAGEMENT VISION

IMPLEMENTATION GOALS

1. By March 1, 2015, the administrator has prepared a work paper detailing the budgetary requirements for equipment and software upgrades necessary for FY 2015-2016.
2. By July 1, 2015, an outside source has prepared an assessment of the information technology at Christ the King to include the development of an employee training program.
3. By July 1, 2015 policies and procedures to ensure digital security and privacy have been developed.

Christ the King Passionist Retreat Center
Strategic Plan

ORGANIZATIONAL LEADERSHIP

Christ the King Passionist Retreat Center is a vital contributor to the spiritual growth of our visitors and guests. Through its leadership it continues to move toward prosperity with a plan for growth, qualified staff and a relevant program that serves our many retreatants.

1. Statement of Current Reality:

   A. The Christ the King Board is still a fairly new administrative body at Christ the King.

   B. Many of the original Board members have turned over, and a number of the current Board are fairly new / under two years of service.

   C. The Board has become more active in the last year or so, working through five standing committees and one ad hoc committee (Strategic Planning Committee).

   D. The Board has become much more diversified, both in gender, ethnicity and background.

   E. The management team has completely turned over several times in the last three years.

   F. The Board and the management team are in much better co-ordination in the last two years, than in previous years.

2. Factors Driving Change:

   A. Christ the King continues to face significant economic and cultural challenges.

   B. The generation under 50 years of age does not have much connection to Christ the King or to a retreat experience. Additionally, Passionist retreat weekend experiences continue to be heavily tilted to female attendance with limited attendance by minorities.

   C. The vowed Passionist Community of priests and brothers is aging and their ability to staff their various retreat centers and parishes is being carefully examined.

   D. The Christ the King Board and the management team are aware of the above factors and desire to expand the membership of the Board both with attention to skill sets and diversity.

3. Statements of Desired Outcome:

   A. Christ the King will be viable and stable with an active, educated, spiritual, vibrant, diverse Board that is fully committed in their time, talent and treasure to Christ the King.

   B. A balanced retreat team of clergy, and lay women and men will provide dynamic Passionist retreats to a very diverse population (age, sex, ethnicity and race) of faithful.

   C. Christ the King Passionist retreat weekends will be at capacity and fully self-funded.

   D. Christ the King will be led by a stable, professional, skilled and diverse management team assisted by trained volunteers.

   E. The management team will be appropriately compensated.

   E. The entire Christ the King organizational team will be working in close coordination with our sponsor, the Passionist Community for the greater glory of the People of God.

ORGANIZATIONAL LEADERSHIP VISION

IMPLEMENTATION GOALS

1. By July 1, 2015, Christ the Kings has completed the expansion of the Board by adding candidates who are diverse and possess needed skill sets.

2. By July 1, 2015, Christ the King has planned another Passionist formation day for both Board and management providing an opportunity for a deeper understanding of the Passionist Charism.

3. July 1, 2015, an Employee Training Needs Plan for each employee has been approved by the Retreat Center Administrator. The Administrator's and Development Director's training plan has been approved by the Retreat Director.

4. By July 1, 2015, a Volunteer Training Program has been approved by the Retreat Director. After July 1, 2015 all volunteers are required to complete training prior to installation. By June 30, 2016 all current volunteers have satisfactorily completed training.

5. By July 1, 2016, Christ the King has a balanced and diverse retreat team of clergy, lay women and men presenting dynamic Passionist retreats to a very diverse population of faithful from greater Northern California and beyond.

6. By July 1, 2016, a formal Passionist Charism Study Program for the Board, staff and volunteers has been finalized by the Retreat Director in cooperation with the Board's Formation Committee.

7. By July 1, 2017, Christ the King is economically viable and stable with an active, trained, spiritual, vibrant, diverse Board, fully committed in their time, talent and treasure.

8. By July 1, 2017, Christ the King has a stable, professional diverse management team that is compensated fairly and trained properly, and which is supported by the Board, and assisted by the staff and trained volunteers.