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**Managing a Fiscal Crisis in the Midst of Merging  
Two Faith-based Human Service Agencies: A Teaching Case**

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## *Introduction*

After spending my entire career in managing nonprofit, public sector and private sector human service programs, at the age of 59 I was offered the job of Executive Director of the San Francisco Catholic Youth Organization (CYO). It is the youth development agency for the Archdiocese of San Francisco, and I had worked there 40 years earlier as the manager of group homes. So I thought, “What a nice last job to complete my career by overseeing St. Vincent School for Boys, group homes related to the juvenile system, inner city after school programs, all the athletic and camp programs, with an office only a half an hour from my home. I felt like I had died and gone to heaven”.

When I arrived in 1999, the agency employed 300 staff members and had an annual operating budget of approximately \$13 million. Other CYOs around the country primarily offered recreational programs for youth. This agency differed in that it also delivered many social services. Shortly after I settled into my new job, I received a call in 2000 from the Archbishop. He asked me to take over Catholic Charities to manage their fiscal crisis and scandal and wanted me to leave CYO. I told him that I could not leave after so recently taking the position. He said, “Well, then you can do both jobs on one salary.” So I agreed and started in August of 2000 to manage both organizations and lay the groundwork for an eventual merger.

The CEO who had precipitated the financial crisis (my predecessor) was very corporate in his managerial style and did not have any background in social services and the staff really knew it. He had a very charming way of dealing with people and was appointed by the former Archbishop who ignored the advice of his own hand-picked search committee in 1991. By 1999, Catholic Charities had begun to accumulate large deficits (\$1.7 million) and his solution was to fire the CFO and the audit firm. In 2000, another large deficit emerged in 2000 (\$2.7 million), creating a combined 2-year deficit of over \$4 million in an agency

with a \$23 million annual operating budget. This deficit resulted from a line of credit with a large health care system that was established to handle the normal cash flow problems associated with the delays in receiving reimbursements on the agency's government contracts that comprised 75% of the operating revenues. At least \$2-3 million were required each month just to pay the bills; therefore, the organization had to have some form of working capital for your operating. While the line of credit was necessary and legitimate, it was arranged without any board oversight. The only board member involved in the decision was the chair of the Catholic Charities Finance Committee, who was also the CFO for the large health care organization providing the line of credit. The Finance Committee Chair was a man of integrity, but was easily misled by the CEO.

The former CEO used that line of credit to add staff, to develop new programs, and to cover personal expenses related to hotels, restaurants, bars and beauty treatments. By themselves, none of these activities triggered the Archbishop to take action. What did prompt attention was the decision to close down the Guerrero House Program, one of only two special programs serving 18 to 21-year-old street kids.

The young staff at Guerrero House did a lot of courageous work in raising people's awareness about the organization's financial situation. One very brave staff member, using a pair of latex gloves, went into the administrative files, pulled out the expense accounts, and gave copies to a sympathetic newspaper reporter who was trying to get to the bottom of the Guerrero House closure,. This promoted the publication of a series of unfavorable articles. Subsequently, a committee of dedicated Board members conducted a thorough investigation of the CEO's activities, which resulted in his termination.

When I became the Executive Director, I remember being asked by the same reporter, "Is the whistle-blowing staff member going to face any consequences?" I said, "Yeah, I'm going to promote him, I'm so impressed with what he did." And in fact, I did, and he's a very valuable member of the management team. However, the Archbishop was not happy about

that. The Archbishop's response was, "Well, he should have come to us," and I kept trying to tell the Archbishop that people had come in before, but the former CEO was able to paint them as disgruntled employees and therefore nobody listened. While one can make the case that the staff member engaged in an unauthorized removal of agency property, it is clear that he took a calculated risk and in my mind, did the right thing. If somebody blows the whistle on me and it's the truth, then that's my problem. If they blow the whistle on me and it's not the truth, I'll just have to manage the incident. I would much rather have the opportunity for whistle-blowing than not.

### *The Call from the Archbishop*

Before the Archbishop's telephone call, I had initiated a few conversations with people who were knowledgeable and trustworthy current and former staff and board members. The day that he called me in his car and said, "I'm coming over to your office," I knew I was not in trouble, so it was not a total surprise. Truth be told, I was probably more excited than I've ever been in my whole career to have the opportunity to tackle a complex situation. While I loved the CYO job, it was not in crisis and did not produce that addictive adrenaline flow that I recalled from my days as a public sector department director working for the Mayor. While I had only been the Executive Director of CYO for 18 months and had just settled in, I knew that the Catholic Charities situation was very serious. A proper response would address debt management, deal with low staff morale, and protect the multi-million dollar contracts with the city that were all at risk of being cancelled (75% of the agency's budget). It quickly became apparent that I was probably the right person at the right time, with the right experience, and a considerable amount of credibility with those in city government. Additionally, I knew non-profits and being a Catholic was also helpful. To put this situation in a faith perspective, I actually do not think any of this was my doing. The

word we would use in our faith tradition is “calling” and I feel that I was called to step in and manage a crisis.

When I arrived at the agency, it was absolute chaos, especially since files had been shredded. The Friday before I was to take over, I was briefed by the archdiocese attorney and Human Resources Director. We received calls from Catholic Charities staff that as soon as it became apparent that the CEO and CFO would be let go, they began authorizing bonus checks for some and terminating others. As a result, on that Friday I accompanied the HR director to the CEO’s office and helped to escort the CEO and the CFO out of the building. We had found them all hunkered down in the CEO’s palatial, newly redecorated (\$15,000) office. When we knocked on the door and he came up and I said, “I’m really sorry but we need to escort both of you out of the building by 5:00 pm”.

The situation was tense and chaotic. Once we returned from escorting the CEO and CFO to the elevator, people were clapping. One of the things I said in the midst of all the clapping was that: “I’m sorry that I need to come into the agency this way, I’ll be back on Monday morning to start officially. But I just want to say, anybody whose title begins with “chief”, your job is eliminated, we’ll give you appropriate severance pay, but there will be no more chiefs around here.” There was a chief accreditation officer, chief development officer, chief operating officer, chief financial... It was ridiculous. It was like \$400,000 worth of chiefs that simply weren’t necessary and weren’t doing anything, and all with their own expense accounts. So we just eliminated those positions and most of them left the agency without incident, with one exception where we settled the legal dispute out of court.

It turns out the CFO was destructive in many ways, not just financially, but in his intimidating approach to staff. He came after us in small claims court, and thanks to one of our board members, he failed to win his case. It is important to note that there were no policies and procedures in the Archdiocese to handle such an unusual situation, especially since the Archbishop thought that the misbehavior was simply a case of credit card abuse. So

I think the conditioned response by the Archbishop was: “All right there’s a problem, let’s fix it, let’s get the right person in,” and he thought that I was the right person to go in and represent him.

### *My First Official Day on the Job*

On my first Monday I found a handful of great people in the agency. I also brought with me some of my CYO senior managers who did an amazing job in managing the transition out of chaos. However, several of them were overwhelmed by the magnitude of the situation and left after a year or two. Buried in the crisis management situation was the growing realization that the two agencies (CYO and Charities) needed to merge; however, this process was more complicated than any of us realized. The public and private funding that supported CYO was much simpler to administer than the contracts held by Catholic Charities. While the first week on the job is a blur, I do remember that I could not work in the gaudy, plush office of my predecessor and quickly found a vacant space to use as my office. After a few days, I thought, “This is so depressing; I’m going out to see the programs.” In two weeks I visited 20+ programs and it was the best thing I did (see Figure 1 for the range of programs). It gave me a sense of that we were going to be fine because the programs were so credible and I met some very talented people. It helped me keep my sanity.

In addition to meeting many of the program staff, I called an emergency Board meeting in the basement of the Cathedral and was amazed to see all the board members, including the Archbishop, in attendance. Prior to the emergency meeting, I had invited all interested staff to a venting session by saying: “I realize how traumatized everybody is, how ugly and painful this is, but we’ve got to move on, so I’d like to have an informal session where we all can share our concerns and I set aside four hours on Friday afternoon.” Three of the most articulate staff members were asked to share their concerns at the Board meeting. I

think that it was not until the Board meeting that everybody realized severity of the situation and that was the day that the healing began. And I'll never forget the reaction of the Archbishop.

The three staff members who presented their concerns to the Board were: a) the staff member who later became our controller, b) the program director at Leland House that serves those disabled by HIV who later moved up to become senior director of all programs and services, and c) the clinical coordinator at a homeless family transition house, who is Jewish and who told a story at the staff session that knocked my socks off. She described several incidents regarding her battles with my predecessor. She resisted his corporate efforts to refer to all clients as customers. She told him that she was not going to follow his orders and noted: "Our women are moms in shelters who do not have the same choices as customers who shop at Albertson's or Costco. If you're a client in our agency, you do not have choices." Since she would not comply, she was called into the CEO's office where she found a consulting psychologist who was on retainer to assess the reactions of employees who were being censured or written up for poor performance (this psychologist also observed staff meetings). In the CEO's office, she said, "I just can't call our clients customers because I don't think its right. It's a matter of principle for me." He then said to this young Jewish woman, "Everybody has choices, even Jews being led into the ovens had choices to die with dignity or not." When she told that story at the board meeting, I watched the archbishop who just put his head down. There were eight to ten board members in tears. And the Archbishop said, "I now realize how negligent I've been in my role, and I offer my mea culpa to the board and to the staff." That is the day that we began to come back. That was the day that some kind of healing began.

## *Assessing the Fiscal Damage*

The Board created a five-person investigation committee comprised of those who were kept in the dark about the fiscal crisis. They compiled a thorough and comprehensive report. While the investigation report of the Board Committee was handled over to the State Attorney General's Office and the County District Attorney, no prosecution took place. The Archbishop ultimately decided not to pursue the matter and opted to put the ugly mess behind us and avoid more damaging newspaper stories.

So when I started, I had some board members who were well informed about the situation. One of them, a very talented retired senior partner at Ernst & Young who was dedicated to the agency, became the new chair of the board Finance Committee. Things were so bad, that when PriceWaterhouse came in to do the audit, they had to bring a forensic accounting firm to reconstruct the general ledger. Throughout the first year we could not rely on our monthly financial statements because they were probably not at all accurate. It was not until the end of my first year that we could say that our numbers were credible. We also testified before every county commission where we had contracts. We were given six months probationary contracts and told to return after meeting certain requirements. With regard to our credibility, it probably helped that I was a former county human services department director, and we maintained all our contracts.

We decided to tell the whole world what happened. We developed a mailing list of over 52,000 people and decided to send them a letter (we actually sent three letters that first year). The first one was an apology letter and I remember that one of our young staff members in the Development office suggested that we put the word 'apology' on the envelope because if they see Catholic Charities, they will just throw it away based on their disgust over the financial scandal. In addition, I made sure that the mailing was already printed before I brought it to the Board. While admittedly risky, I thought that I needed to use my honeymoon



period. If they did not like what I was doing, I could always go back to the CYO job. I did not volunteer for managing this crisis. I had also received some excellent advice from a volunteer who had been the head of corporate communication at a national bank and was an expert in crisis communications. He really helped me craft the letters.

Following the mailing, we received good press in our major newspaper as well as the Catholic newspaper that goes to members in our 90 local parishes. With Board leadership, we followed up the letters with a series of “restore the faith” meetings where each board member or donor sponsored a wine and cheese event in their home for maybe 15 or 20 people and I would come and talk about next steps. While the actual high water mark of the debt was about \$3.5 million, a number of things happened right away to get it down to about \$2.5 million, including the process of getting out of a building lease that saved us \$1 million thanks to the skills of one of our Board members. The same Board member and his wife gave us over \$1 million during the last seven years and helped to raise almost \$10 million by creating the Archbishop’s Charity Council that included individuals who were not donors or Board members. His pitch to the Council was: “This is going to be hard but we need to pay this debt off and we’d like you to commit to \$100,000 a year for three years.” The major donors stepped up to the challenge.

We then sent a second letter telling everyone how much we owed, how much we raised, and the outline of our new business plan. Finally, a third letter was sent describing the merger.

In essence, there were two strategies. The first was to be totally transparent by telling everyone what was happening and it seemed to work. The second was to involve people with expertise, on and off the Board, to oversee the investigation of the financial problems, the management of the communications process, participate in the renegotiation of our major lease, and reach out to major donors. We went through some painful years, but by the summer of 2005 we were debt-free, and today we have a modest reserve. Without the

involvement of these corporate and community leaders, this major recovery would never have happened. I did not have their expertise or experience. As a result, it was clear to me that I needed to hire strong senior managers in the areas of finance, development, and communications. I was trained as a social worker and not as a financial manager, but I do know the difference between budgeted and actual expenditures and the goal of no deficit.

This financial crisis also helped to redefine our executive-board relations. When you have expertise on your Board, you are crazy not to use it. However, I remember having a few managers in the years right after the crisis emerged that said, “The board’s got too much to say, they should just be raising money and staying out of our face,” and I said, “No, not today.” I reminded them that in the old days, Boards set policy and did not get involved in operations but not in these times of crisis. If stakeholders are to be involved, the content of their efforts needs to be substantial. Today, our management team is much more comfortable with strong Board oversight.

### *Continuous Freefall*

Our capacity to raise money was limited because of the financial crisis. No sooner had we started to get back on our feet, the whole church scandal erupted and the bottom fell out of the stock market. The timing for expanding our donor outreach was terrible. So we increased our attention to parish outreach, most of which was done by one worker and myself. I reminded the pastors that we are a Catholic agency with a natural affinity to the parishes whose members need services, especially in the poor parishes. Also, there are potential donors in the parishes, so why wouldn’t we want to have a good working relationship even though it had become somewhat frayed at the time. I also reminded them that we serve people regardless of their faith and we hire based on people’s qualifications, not their faith.

We are always mindful of the fact that we are the social service arm of the Church. We need to manage our religious identity as well as the people's perceptions of who we are because our name is Catholic Charities. In particular, we are constantly managing the tension between what our Church teaches in the area of sexuality and how we carry out our mission in this pluralistic society in the midst of never-ending battles related to domestic partners, abortion, contraception, gay marriage, and same-sex adoption. One approach that I have adopted to help staff manage these tensions is captured in a session that I lead on new employee orientation on Catholic identity.

I want people to know what they're getting into. What does it mean that it's a Catholic agency? And just as important, what does it not mean? It does not mean that you must be Catholic to work in this agency and it does not mean you must be Catholic to receive services. However, it does mean you need to understand our values, especially to care for those unable to care for themselves. In the Old Testament there was the tradition of caring for widows, orphans and sojourners. In the New Testament is Matthew 25: "What you did for the least of my brothers, you did for me." Today, our widows are single moms transitioning off public assistance, our orphans are the 82,000 children in the foster care system, and our sojourners are the people on the margins of society, whether it's drugs or HIV or homelessness. If staff can identify with this value of caring for others, it does not matter if they have a belief system or not. Somewhere in us is a calling that reminds us that we do have some responsibility in this world for our brother and our sister who's poor or vulnerable or marginalized." Part of the vision of bringing together Catholic Charities and the Catholic Youth Organization was to provide opportunities for healthy growth and development for children and youth so they do not become poor or vulnerable or marginalized.

Then I continue the orientation session by focusing on Catholic social teaching, especially charity and justice (Figure 2). I share with staff our positions on social justice issues then I get into the tricky issues of sexuality and how we manage the tension between

what our Church teaches in terms of sexuality and how we are expected to carry out our mission in this very pluralistic society. In the area of domestic partners, the City of San Francisco mandated that all contractors must provide domestic partner benefits. The initial response of Catholic Charities was that this would be problematic in terms of the Churches teaching as to who can be married. But creative heads came together on both sides, and Catholic Charities proposed that the City broaden its policy beyond gay and lesbian partner benefits to include any legally domiciled household member who is uninsured, including seniors and children. From the point of view of Church teaching, the criteria then became need and household status rather than sexual orientation. It also was a step toward universal healthcare. The City bought off on the compromise. I do not want to suggest that there are lots of 87-year old hetero-sexual grandmothers receiving benefits, but the reality is that this solution allowed us to be consistent with the teachings of the Catholic Church and the mandates of the City and County of San Francisco.

In another instance the City mandated that our health plans provide direct abortion coverage. We explained that as a Catholic agency, that would never happen. On the other hand, because two-thirds of our workforce is women of childbearing age, we felt an equally strong obligation to respect their needs. The resulting compromise was that we agreed to add \$50 a month (\$600 a year) to each employee's flex credit benefit for any "uncovered medical expense", and to create a third-party interest free confidentially administered loan program to allow employees to borrow up to \$600 a year for an "emergency uncovered medical expense."

When the issue of same-sex adoption emerged and the Vatican told us to stop doing same-sex adoptions, we found another creative solution. We transferred our workers to a neighboring adoption agency not to work in their direct adoption program, but to staff a State-wide website promoting the needs of hard to place children in the foster care system and responding to calls from potentially adoptive parents who expressed interest in those children.

We will potentially quadruple our impact in the adoption field serving these vulnerable children, while at the same time not controvert to Church teaching.

### *The Complications of Merger*

As far back as 1993, I advised the Archdiocese (as a volunteer consultant) to proceed with the merger of CYO and Catholic Charities. So, in the summer of 2000 when the archbishop asked me to take over the leadership of Catholic Charities, I said in all candor, “If you’re going to have me direct both agencies, we ought to start merging.” He said, “right now, I want you to fix Catholic Charities.” So I waited a bit, but began talking it up, and eventually got him to commit to a feasibility study. We looked at some of the literature on mergers and created a joint task force representing the CYO board and Charities board in 2001. It was interesting because the CYO board members were against it. They saw Catholic Charities as an albatross that would drag them down. But what they were not seeing was that CYO had significant deferred maintenance problems at camp and at St. Vincent’s. While the CYO operating budget looked okay, we had no reserves for deferred maintenance. And I thought, naively or otherwise, that we could turn the Charities thing around as well as save about \$500,000 a year in duplicated administrative costs.

We completed the legal merger in July 1, 2003. Merging the two organizational cultures turned out to be more complex than the merger planning process. In essence, the Catholic Charities culture was more corporate and the CYO culture was more informal and grassroots. CYO had grants to administer 4 or 5 programs and no donor base while Catholic Charities had contracts, a large donor base and 15-20 programs to administer. It took at least two years, beyond the legal merger. Some of the challenges related to the financial crisis, some came from the integration of selected programs and services, and some came from the introduction of new staff who arrived without the “historical baggage” of the merged staff.

While it may have looked like \$23 million Catholic Charities acquiring a \$13 million CYO, Catholic Charities was so crippled by the financial crisis that it did not feel like an acquisition. In fact, if you interviewed the senior managers on the CYO side, they would say that they felt that I abandoned them and in one way I did. At the time, I thought it was a compliment to CYO that they could manage things. The senior managers only saw me for a couple hours a week because I was buried in unscrambling the financial crisis.

We did the merger based on the affinity between two Catholic agencies and a director who was knowledgeable about both agencies. It seemed like a natural thing to do and appeared to be the height of irresponsibility to not to bring them together and save at least half a million in administrative costs. Based on the success of the merger, we are now looking at successful programs that we could spin off to other agencies in the community that have more experience and expertise than we do. This activity is built upon a set of questions that we are now asking ourselves: What are you good at and want to keep doing? What are we good at that we are not doing and should be doing? What are we doing that we might not be good at? What are we doing that we are good at, but someone else is better at? This allowed us to eventually transfer a program for 18-23 year old street kids to another non-profit whose mission targets that population. I suspect that most nonprofits rarely ask themselves these types of questions. These questions led us in the direction of strategic planning where, for the first time, we stopped thinking primarily in a crisis management mode.

Back in 2001 I sent a memo to the Board saying, "We're going to be in crisis for quite some time, but we do need to start addressing our future and where we want to be in five years". We needed to reassess our programs and services, our mission, our relationship with parishes, our ratio of public versus private funding, and the nature and extent of our staff and lay leadership development efforts. It was not until we finalized the merger in 2003 that we decided to begin some planning based on the strong support of our Board President, and retired State Assembly Speaker who chaired a Strategic Planning Committee. One of the

important outcomes of the strategic planning process was the question, “Are all our programs critical to our mission?” This question helped to focus attention on the business-related income from the transportation program and the future investments in our homeless youth program. Both of these were seen as less critical to our mission and could be spun off. The Transportation program may be re-established as an independent for profit or nonprofit with whom we could contract for services.

We also looked at our focus on the poor and working poor families, seniors, people with HIV, youth camp and athletics, and parish relations. We also looked at succession planning. We learned that strategic planning is a never-ending process because as soon as you implement a plan, you are laying the groundwork for the next plan. One of my managers asked, “Are we ever going to be to the point where we’re not managing change?” I said, “No, because systems, organizational cultures and external environments are always changing. However, I recognized from this question that I did need to pay more attention to staff that are stressed out because of too much change. For me, managing change is a major component of my job. The crises do not stop just because you move into a strategic mode, but I think that a strategic plan can help everyone deal with crises a little bit better because you are using both a crisis management and strategic management way of doing business. When I started on August 11, 2000, I got up every morning for five years and never had to have a strategic thought in my brain. As a crisis manager, all my thoughts were tactical in the continuous process of putting out fires. While I thrive on responding to crises, I would be fine with no more crisis for the rest of my tenure as director because it is challenging enough just to do the regular day-to-day management, let alone the strategic thinking and prioritizing.

In order to build a strategic plan, my managers met every Friday morning until two in the afternoon for six months. The Board-appointed chair of the strategic planning committee led these meetings and skillfully directed the completed plan through the Board approval process. Figure 3 includes the 13 priorities for the four year period of 2006-2009. The Board

then called for an implementation plan that included financial projections. Our new Board president, who had been the finance committee chair (first woman MBA from Harvard), led the effort to conduct a review of fiscal projections for a four year period (2006-2010) based on the financial implications of the strategic plan. We called it the forecast and she said, “I don’t care when you get to sustainability, but you’re going to have to show us that you can get there, and we can’t be overly dependent on bequests.”

While in some years we have raised up to \$5 million in bequests, the Board wanted to keep these funds out of the operating budget. They are right but I’m just not quite there yet. So I have a deal with them that I get to use half a million of it in my operating budget for the next few years. But it has got to come to an end. The fiscal people on the board say, “You can’t be all things to all people, you have to cut.” My answer is, “Yeah, well, whose ox are we going to gore?” So some of the very people that say we have to cut may develop different views when I present to them with the prospect of cutting one of their sacred cows. Because of our excellent fiscal plan, our Board president gave us a \$1 million gift this year. It is a challenge to the other board members who could give a seven-figure gift, so we are going to see what happens. Our 2007 budget was approved at \$40 million, and they said, “We want you to give us a plan B if you have to do some cutting.” So I proposed a reduction of \$250,000 to be accomplished with the funds from unfilled positions. Figure 4 includes the budgeted revenues and expenditures.

While the development of the strategic plan was primarily staff-driven (I do not think that the Board strategic planning committee met more than three or four times), the implementation of the plan is more board-driven. The strategic plan has considerable board member oversight that includes a programs and services committee chaired by a businessman with program and camp experience, five or six board committed members, and a parish outreach committee chaired by the former Finance committee chair. It is clear that the



strategic plan has helped all of us think more strategically. It has us moving from crisis management to a focus on sustainability.

Today our other big challenge is building a management leadership team (see Figure 5 for organization chart). However, 2006 was a terrible year, as I almost lost my CFO and I had a big problem with my senior program director. The two of them were at war with each other and it was out of control. I am not as good at personnel management as I used to be and I was distracted with other issues in the community. However, they both have responded well to coaching. Our recent staff retreat indicates to me that we are now in pretty good shape. People spoke their truth. I do not care if they socialize with each other and go out and drink with each other; I just want them to speak the truth respectfully and gently, and be a team because that is where it serves us and me the best. Our next leadership challenge relates to advancing the skills of our middle managers and installing a new client information system.

It is important to note that in the midst of the crisis management, I made a number of personnel mistakes. First, I assumed that my effective managers from CYO could handle the chaos of the Catholic Charities environment. For several people, the culture change was too great and undermined their effectiveness. At the same time, my Board president told me that I needed to spend more time on the big picture, more time on fundraising, and less on operations and programming. In response, I created a position of chief operating officer (COO) with the following direct reports focusing on internal operations (I swallowed hard and used the word “chief”): finance, human resources, and program. The only positions that did not report to the COO were parish relations and development who reported to me. The position created one level between me and my senior managers and, as a result, I am constantly going around the COO to communicate with his direct reports. Finally it just came to a head and I concluded that it was not working. Despite his anger, I gave him a generous severance package and helped him find another job where he is doing very well. He was pleasantly surprised that I was such a good reference for him.

Despite the many human resource issues that I have faced, having a recent focus on strategic management, strategic thinking, and strategic planning provided me with an very helpful anchor in times of crisis. There are so many moving parts in agency management that you are not in control of.

### *Planning for the Home Stretch—December 2009*

The Board recently completed a 360 evaluation of my performance. It was comprehensive and fair. In addition to much praise, I was reminded by the Board of the need to focus more on fundraising issues. In addition, I need to focus more on building the management team in anticipation of my retirement scheduled for December 2009. If the search for my replacement is completed by the middle of 2008, then we can overlap for six months to orient my successor.

### *Reflections*

In the process of projecting future funding, I struggle with the definition of what constitutes a healthy mix of government funding of nonprofits. While it is clear to me that government can not do it all, with nonprofits, there needs to be a partnership. When I came to Catholic Charities, the agency was 75% government funded and I thought that was too much. Many of the agencies that are part of the San Francisco Human Services Network are 80, 85, 90, 95% government funded. In fact, there are really two types of non-profits out there. There are some types that do fundraising like us and there are others that view themselves as subcontractors who can deliver more cost-effective and efficient services than government can deliver. My bias is that you need the voluntary dollar in mix in order to reflect community

support and involvement in serving the needy, especially a viable fee structure that does not gouge the poor. So, our best mix today is 55 percent government, 45 percent non-government that includes fees and fundraising. The role of the board and volunteers is not just to govern but to represent the community and to give us credibility by their names being associated with the agency. The same is true for donors who associate their name with the agency in a way that gives us credibility. It works both ways. I really believe that the way we're going to get the sustainability is to increase that percentage of voluntary fundraising whether it's for capital, restricted operating funds or discretionary funds.

For me the goal is roughly 50/50 funding from government and donors and fees. Then you have a real partnership that needs to be continuously cultivated in both the government sector and private sector. We need to bring in 6 or 7 million in fundraising each year just to keep breathing, and I need to play a role in this process because it is part of my job. The issue of fundraising leads me to a whole other area that we have only in recent years begun to address and that is communication and marketing.

We hired our first director of communication and marketing about two and a half years ago and it was seen as a huge luxury. It has helped us move beyond the old idea that what we are doing is so valuable that it speaks for itself. We are all more interested in doing the work than talking about it. We really began to pay attention to using pictures to capture the essence of our work with those in need as well as use marketing materials and brochures. We are trying to get more sophisticated with the use of our website. A communications capacity is also needed to handle the media related to our controversial policies and programs. If you were looking at our monthly file of press clippings, you would see a fourfold increase in positive press as a result of our communications staff.

## *Lessons Learned*

I think the first thing that I would say is if you are not basically secure and confident at this point in your career, and if you do not thrive on crises then do not take on an agency in crisis. You need to feel like you can do it and you have to want to do it and, most importantly, you need to be prepared to quit. You should take the job with the freedom to do what you think is right within board policy but be prepared to speak your truth and risk not having the job. So do not take it for job security.

Second, it is important to be completely, totally transparent and not try to make the crisis go away by not talking about it. Make it go away by continuously talking about it until people get sick of hearing about it. I remember a donor saying, "Enough with the letters." And that's what I wanted to have happen. You need to understand the organization's values and comfortable with them if they are not your values. For example, I think that it would be difficult for someone who is not Catholic to assume the director position. However, I have senior staff members who are not Catholic who get it, and that is really what counts. So that whole thing of whatever the driver values are of the organization, you better understand and you better be comfortable.

Third, you need to know that you are going to be dealing with at least 16 difficult situations in the same day. This reality needs to be balanced with getting out regularly and talking to program staff to help remind you about why you are doing the director job. It is also important to use the honeymoon period to make all the decisions that you will not be able to make three years later. This window of opportunity can be used to call board meetings, help people leave the agency, and hire new people. You have more freedom in the beginning and more political constraints as time goes on.

Fourth, you need to find the talented board leaders and engage them right away, otherwise, no matter how good you are, how secure you are, or how risk-free or risk-averse you are, you can not accomplish the big changes without their involvement. It is also important to value the history of an organization. This agency traces its roots back to serving youth at St. Vincent's in 1851 and the launching of social services under the auspices of Catholic Charities in 1907 as a result of the major San Francisco earthquake in 1906.

A fifth lesson relates to the importance of strategic planning as a balance for managing day to-day crises because it puts the crises in perspective as well as puts the plan in perspective. Without the second rail of strategic planning, crisis management can be a wild ride. I find the whole issue of managing the tension between what our church teaches and how we carry out our mission to be incredibly stimulating. That may sound like a weird statement. But in a pluralistic society where religion is a factor in society, where statistically more people believe in some kind of supreme being than do not, whether they practice it or not, delivering social services from that value system and to do it in a way that avoids all the thorny issues is fascinating to me, even if the issues are painful. It is this intersection of conflicting, in most cases legitimate, priorities and how you manage them. And I think I am very comfortable in my old age doing that, so much so that I had to be dragged a little bit into the strategic side and the sustainability side.

A sixth lesson relates to never forgetting that you are in a leadership role. You need to live with the consequences of your decisions. But you have the opportunity to take all those leadership qualities and operationalize them. For example, going out and talking to the staff early in my tenure is not only the smartest thing I did but it was familiar territory and important to let them know that I was there for them and that I supported them. I am now working on helping staff to see their role in service provision as including advocacy. I recently led a session on advocacy and public policy at an all-managers meeting and they loved it. Any formal organization efforts here have to be grounded in the reality of programs

and services. While I currently assume this role, I need someone who does not confuse lobbying for annual cost of living increases related to grants and contracts with advocacy. We need to be one of the voices on public issues like homelessness and immigration. Our parish outreach also needs to include advocacy that involves the people in the pews. Finally, if you are going to engage in advocacy, you need to understand the major value conflicts (e.g., parents' rights versus children's right, privacy versus government intrusion, family preservation versus child protection).

### **Discussion Questions**

- 1) What leadership and management factors contributed to Catholic Charities' fiscal crisis? What immediate interventions did Brian Cahill put into place once he accepted the Executive Director position?
- 2) What long-term management strategies were used to address the fiscal crisis? How effective were these efforts? What were their strengths and challenges?
- 3) What strategies did Brian Cahill draw upon to balance the agency's religious identity with the needs of the community that they served?

## **Figure 1: Catholic Charities CYO Programs**

Founded in 1907 to care for the orphans of San Francisco's 1906 Earthquake, Catholic Charities CYO is the social services agency of the San Francisco Archdiocese, yet operates as an independent non-profit organization, and does not in any way contribute to or receive funds from the Catholic Church. Catholic Charities CYO supports and advocates for the poor, the sick, the distressed, children, youth, families, immigrants and seniors, regardless of their faith. All money contributed to Catholic Charities CYO directly supports our programs which serve more than 40,000 clients every year in San Francisco, Marin and San Mateo Counties.

### *San Francisco County*

#### **SENIOR SERVICES**

**Alzheimer's Day Care Resource Center**  
**OMI Senior Center**  
**San Francisco Adult Day Services**

#### **FAMILY & CHILDREN'S SERVICES**

**Adoption Information & Referral**  
**Children's Village Child Development Center**  
**Homelessness Prevention Programs**  
**Mission Day Care**  
**Refugee & Immigrant Services**  
**St. Joseph's Family Center**  
**Treasure Island Supportive Housing**  
**San Francisco Behavioral Healthcare Services**  
**San Francisco Boys' and Girls' Homes**  
**CYO Athletics – San Francisco**

#### **ASSISTED HOUSING & HEALTH PROGRAMS**

**Assisted Housing & Health Programs**  
**Derek Silva Community**  
**Leland House**  
**Peter Claver Community**  
**Rita da Cascia**

### *Marin County*

#### **SENIOR SERVICES**

**Marin Aging Services**  
**Meals on Wheels**

#### **FAMILY & CHILDREN'S SERVICES**

**Canal Family Support Program**  
**CYO Athletics – Marin**  
**Marin County Counseling Services**  
**St. Vincent's Foster Family Agency**  
**St. Vincent's School for Boys**

## *San Mateo County*

### **SENIOR SERVICES**

**Meals on Wheels**

**San Carlos Adult Day Services**

### **CHILDREN AND FAMILY SERVICES**

**San Mateo County Counseling**

### *Archdiocese-wide*

**Caritas Creek Environmental Education**

**CYO Summer Camp**

**Information & Referral**

## **PROGRAM INFORMATION**

### **HIV/AIDS SERVICES FACTS**

- A first responder to the epidemic in 1985, Catholic Charities CYO continues to be one of the largest HIV/AIDS service providers on the West Coast.
- 25% percent of the HIV/AIDS population in San Francisco has received assistance from Catholic Charities CYO services.
- Over 200,000 nights of housing for people living with HIV/AIDS this year and every year since 1995 are provided or supported by Catholic Charities CYO.
- Over \$2 million has been invested by Catholic Charities CYO to help offset health care costs.

### **DEREK SILVA COMMUNITY**

A residential program designed to provide housing and case management services for individuals disabled due to HIV/AIDS. Designed for independent living, each apartment is equipped with its own kitchen and bathroom. Resident-run art and activities programs are available.

### **LELAND HOUSE**

A licensed residential facility for persons living with disabling HIV/AIDS. The program serves individuals needing assisted living support. Ten beds are reserved for providing intensive acute care services related to AIDS. Services include nursing and psychosocial case management, money management, 24-hour direct care staff, psycho-educational support, recreational and leisure activities.

### **PETER CLAVER COMMUNITY**

A licensed residential program for homeless persons with HIV/AIDS providing permanent housing, case management, social and recreational services, attendant care, and money management. These on-site services allow residents to live in a supportive community environment throughout the varying stages of their illness.



### **RITA da CASCIA**

Comprehensive integrated services for homeless and marginally housed children and mothers living with HIV/AIDS. Services include intensive case management, money management, peer advocacy, permanency planning, and kinship case management.

### **HOMELESSNESS PREVENTION/FAMILY HOUSING PROGRAMS**

- Our Homelessness Prevention/Family Housing Programs support over 2,000 San Francisco families and over 1,000 children.
- Rental Assistance Programs
- Provided short-term case management, crisis intervention, and direct rental assistance grants to stabilize housing for families and individuals in danger of being evicted because of non-payment of rent, and provided move-in costs for families and individuals moving into more permanent housing.
- Child Care Voucher Program
- Provided intensive long-term case management, child care subsidies, and additional support services to homeless families to transition them to self-sufficiency.

### **ST. JOSEPH'S FAMILY CENTER**

An emergency residential program for homeless families and pregnant women. Services include case management, substance abuse counseling, therapy assessments and referrals, medical care, money management, job search support, and children's activity programs.

### **TREASURE ISLAND SUPPORTIVE HOUSING**

Providing stable housing to formerly homeless families dealing with HIV or AIDS, mental illness, or substance abuse, and supportive services in conjunction with housing, including case management, substance abuse counseling, employment training, and a Children's Activity Program.

### **ST. VINCENT'S SCHOOL FOR BOYS**

A residential program on the St. Vincent's campus in Marin County, St. Vincent's continues its history of providing long-term residential care and treatment for formerly abused boys 7-18 years of age. St. Vincent's provides individualized educational programs that address the special academic and behavioral needs of youth in residential treatment on the St. Vincent's campus.

### **SAN FRANCISCO BOYS' AND GIRLS' HOMES**

Our two shelters provide short-term residential treatment and on-site education for youth 12-18 years of age as a first step toward placement in long-term residential care or family reunification or as longer-term residential treatment to troubled and vulnerable teenagers who require out-of-home placement. The shelters provide an important community-based alternative to placement in Juvenile Hall.

### **CHILDREN'S VILLAGE**

Located in the South of Market area in San Francisco, the Child Development Center provides quality childcare to 136 children whose parents are making the transition from welfare to work. Offers scholarships to low-income families on a sliding scale basis.

## **MISSION DAY CARE**

Provides educational day care options in San Francisco's Mission District for families trying to achieve greater economic self-sufficiency. More than 300 children 5-12 years of age and their families benefit from having a safe place to learn, play, and grow each year at Mission Day Care. Services include Before-and-After-School Program, Winter Recess Camp, Spring Camp, Summer Day Camp, and Family Support.

## **CYO ATHLETICS**

The CYO Athletics program is designed to be representative of the Christian values of respect, love, compassion and support for each other. Through sports, competition and teamwork, CYO Athletics provides healthy growth and development through games, practices and the life lessons that sports teach. CYO Athletics in the San Francisco Archdiocese serves Marin, north coastal San Mateo and San Francisco counties and offers Boy's Soccer, Boy's & Girl's Basketball, Girl's volleyball (co-ed during the summer) and Co-ed Track & Field and Cross Country. Currently, we serve over 11,000 kids in 3 counties and continue to build leaders every day.

## **CYO CAMP**

- 5,000 young people from all over the Bay Area attended CYO Summer Camp and Caritas Creek Environmental Education Program.
- The Caritas Creek Service Corps was created as an opportunity for high school graduates to gain experience in the fields of child development, environmental education, and service.
- 'Individual choice' programs were added to CYO Summer Camp in the areas of dance, theatre, art, and sports, giving campers the opportunity to hone their skills in a chosen area.
- Caritas Creek students traveled to the Sonoma coast and explored the ecology of this diverse bioregion, and CYO Summer Campers traveled to the Russian River and the Sonoma coast.
- CYO Camp partnered with the Sonoma County community to restore our Salmon Creek Watershed. CYO Camp Staff spends two weeks during the year dedicated to restoration projects in the Redwood Forest.

## **CANAL FAMILY SUPPORT PROGRAM**

This after-school program consists of homework assistance, tutoring in reading provided by the on-site Canal Library Learning Center, social skills development, special activities and events, and nutritious snacks. Most of the children served each year by Canal Family Support Program are from families in which both parents work. ESL, employment, and housing referral assistance are also provided to the families of the children who are enrolled in the program. A Summer Day Camp program is offered in June, July and August.

## **REFUGEE & IMMIGRANT SERVICES**

Assists immigrants and refugees with housing, healthcare, ESL education, and employment. Also provides financial assistance, clothing, shelter, etc

### **SAN CARLOS ADULT DAY SERVICES**

- Catholic Charities CYO's San Carlos Adult Day Services program provided 5,404 days of services and 5,404 hot nutritious lunches to frail seniors and disabled adults.
- We coordinated 8,031 rides of assisted transportation for participants to attend our program, provided adult day services for two Katrina evacuees, and provided support and access to services for their family caregivers.
- Our annual holiday party, themed a Karaoke Christmas, hosted family caregivers and members of the community in the celebration with the participants and staff of the Center. For many of our participants this was their only holiday celebration.
- Our annual volunteer party, themed a Polka Party, gave the staff, program participants and family caregivers the opportunity to honor our dedicated volunteers.

### **OMI SENIOR CENTER**

OMI Senior Center helps seniors maintain their independence by providing supervised activities in a safe, enjoyable daytime environment. Seniors receive hot meals, arts and crafts, classes, home care attendants, case management, trips, and socialization with their peers.

### **SAN FRANCISCO ADULT DAY**

These licensed adult day support centers provide a structured, supervised environment in which frail or chronically impaired seniors can safely participate in social, educational, therapeutic, and recreational activities while providing respite to families and caregivers

### **MEALS ON WHEELS – SAN MATEO COUNTY**

- Catholic Charities CYO's Meals on Wheels program in San Mateo County served over 81,000 meals to homebound frail elderly and disabled adults.
- Catholic Charities CYO's first annual Thanksgiving Day Delivery was extremely successful due to all of our volunteers and staff who dedicated their time to planning and taking part in the day.
- More than 60 parish, community and CCCYO staff volunteers packed and delivered over 220 hot meals to frail elderly and disabled adults on Thanksgiving Day. Special thanks to the San Mateo Medical Center Food and Nutrition Services kitchen staff for heating our meals and assisting us in packing them for delivery.

### **SAN FRANCISCO BEHAVIORAL HEALTHCARE SERVICES**

Provides counseling services to 3,700 San Francisco residents each year to reduce incidences of child abuse and domestic abuse, alcohol and substance abuse, marital strife, and homelessness. This program also assists people of all ages and cultures who have experienced personal loss due to a death or separation to understand and work through the process of grief, enabling them to live a fuller life. Services include a special program designed to concentrate on children experiencing loss. Offers professional clinical counseling in English and Spanish to individuals, couples, families, and children.

## **INFORMATION AND REFERRAL**

- The gateway to our programs throughout the agency and the community provided direct information and referral, advocacy, and some emergency direct assistance
- 5,323 individuals were directly served by Homelessness Prevention Programs.
- Rental Assistance Programs served 1,807 individuals in 700 families—827 adults and 980 children.
- Intake & Referral received 23,167 calls last year, provided 2,987 referrals, direct assistance to 124 individuals receiving emergency food, shelter, and bus tokens.
- Child Care Voucher Program served 179 individuals in 66 families—74 adults and 105 children—83 children were enrolled in childcare.
- Post-Hurricane Katrina, our programs served 226 individuals in 135 families—172 adults and 54 children.

## **Figure 2: Themes of Catholic Social Teaching**

The Catholic approach to faithful citizenship begins with moral principles, not party platforms. The directions for our public witness are found in Scripture and Catholic social teaching. The following are key themes at the heart of our Catholic social tradition.

### ***Life and Dignity of the Human Person***

Every human person is created in the image and likeness of God. The conviction that human life is sacred and that each person has inherent dignity that must be respected in society lies at the heart of Catholic social teaching. Calls to advance human rights are illusions if the right to life itself is subject to attack. We believe every human life is sacred from conception to natural death; that people are more important than things; and that the measure of every institution is whether or not it enhances the life and dignity of the human person.

### ***Call to Family, Community, and Participation***

The human person is not only sacred but inherently social. The God-given institutions of marriage and the family are central and serve as the foundations for social life. They must be supported and strengthened, not undermined. Beyond the family, every person has right to participate in the wider society and a corresponding duty to work for the advancement of the common good and the well-being of all, especially the poor and weak.

### ***Rights and Responsibilities***

As social beings, our relationships are governed by a web of rights and corresponding duties. Every person has a fundamental right to life and a right to those things that allow them to live a decent life ~ faith and family, food and shelter, health care and housing, education and employment. In a society as a whole, those who exercise authority have a duty to respect the fundamental human rights of all persons. Likewise, all citizens have a duty to respect human rights and to fulfill their responsibilities to their families, to each other, and to the larger society.

### ***Option for the Poor and Vulnerable***

Scripture teaches that God has a special concern for the poor and vulnerable. The prophets denounced injustice toward the poor as a lack of fidelity to the God of Israel. Jesus, who identified himself with the least of these, came to preach the good news to the poor and told us, "Give to him who asks of you, do not refuse one who would borrow from you." The Church calls on all of us to embrace this preferential love of the poor and vulnerable, to embody it in our lives, and to work to have it shape public policies and priorities.

### ***Dignity of Work and the Rights of Workers***

The economy must serve people, not the other way around. Work is more than a way to make a living; it is a form of continuing participation in God's act of creation. Work is a way of fulfilling part of our human potential given to us by God. If the dignity of work is to be protected, then the basic rights of workers, owners, and managers must be respected ~ the right to productive work, to decent and fair wages, to organize and join unions, to economic initiative, and to ownership and private property.

### ***Solidarity***

Because of the interdependence among all the members of the human family around the globe, we have a moral responsibility to commit ourselves to the common good at all levels: in local communities, in our nation, in the community of nations. We are our brothers' and sisters' keepers, wherever they may be. As Pope John Paul II has said, "We are all really responsible for all.

### ***Care for God's Creation***

The world that God created has been entrusted to us, yet our use of it must be directed by God's plan for creation, not simply by our own benefit. Our stewardship of the earth is a kind of participation in God's act of creating and sustaining the world. In our use of creation, we must be guided by our concern for the welfare of others, both around the world and for generations to come, and by a respect for the intrinsic worth and beauty of all God's creatures.

### **Figure 3: Catholic Charities CYO Program-Based Strategic Priorities (2006-2009)**

#### **Develop Core Programs**

1. Strengthen services to working poor families. These programs will be recognized by clients, parishes, community leaders and donors for their quality, compassion and effective advocacy.
2. Strengthen services to adults who are aging in place. These programs will be recognized by clients, parishes, community leaders and donors for their quality, compassion and effective advocacy.
3. Conduct a comprehensive competitive analysis of CYO Camp's program quality and position in the marketplace of today and tomorrow. Strengthen camp's legacy of leadership and youth development with program enhancements for Summer Camp, Caritas and Retreats. Upgrade the facilities and infrastructure to support the program's objectives, ensuring camp's reputation, viability and financial stability.
4. Strengthen CYO Athletics legacy of leadership and youth development with program enhancements. Add new facilities to support the program's objectives, ensuring CYO Athletics superior reputation, viability and financial stability.
5. Develop and implement a comprehensive plan for parish based and community based CYO Athletics and CYO community centers that provide for youth development and family support, similar to Shipwreck and Canal. Realization of this CYO Community Center vision demonstrates the actualization of our agency merger. Through this program development experience, develop a decision-making tool to review future program development opportunities that are mission-based and sustainable without government funding.

#### **Release Transferable Programs to Thrive**

6. Develop and implement plans to transfer four programs to other non-profit service providers, whose mission and capacity will help these programs thrive. (Richmond Hills, Guerrero House, Leland House, Peter Claver Community)
7. Develop and commence implementation of plans to disengage St. Vincent's, SF Boys & Girls Homes and St. Vincent's Family Foster agency from Catholic Charities CYO.

#### **Connect to Parishes & Communities**

8. Develop and commence implementation of a Parish/Community Service Plan for each county, reflecting their unique needs and in concert with other community providers.
9. Establish and implement a Rapid Response Fund and protocol to guide the use of rapid response funding. These resources will be used in a disciplined process to respond to mission-consistent parish, individual and/or local organizations' episodic challenges in our three counties.

#### **Strengthen Agency Health & Infrastructure**

10. Develop and commence implementation of a business plan to expand the revenue producing potential of the CYO Transportation business. This plan will utilize the newly established business analysis revenue enhancement tool.
11. Develop and commence implementation of a business plan to expand the revenue producing potential of the Geriatric Care Management business. This plan will utilize the newly established business analysis new initiative tool.

12. Develop and commence implementation of a plan to address the agency's deferred maintenance priorities, ensuring the quality of our program and safety of our clients and staff.
13. Reorganize the senior management team, create a succession plan, and implement an accountability plan that supports the vision, mission and strategic priorities of Catholic Charities CYO.

## **PLANNING FOR OUR SECOND CENTURY**

### **STRATEGIC GOALS 2006-2009**

Catholic Charities merged with Catholic Youth Organization in 2003, expanding our agency to provide dynamic and fully integrated social services and youth development programs that serve people of all faiths and all economic backgrounds.

Recently, Catholic Charities CYO's Board and management developed a carefully-crafted long-range strategic plan, which was an exciting process that engaged our stakeholders and clearly defined our core program and service expertise. The momentum resulting from the planning process guides us as we move into our second century of service to the poor and working poor, aging and disabled adults, and youth.

#### Program Excellence

- Strengthen our programs and services for working poor families and those aging in place or struggling with HIV/AIDS. Our [programs](#) will continue to be recognized by clients, parishes, schools, and community leaders for their quality, compassion and effective advocacy.
- Cultivate collaborations as appropriate with other non-profit service providers, whose mission and capacity will help to ensure the future viability of our programs.
- Expand and strengthen our agency for the future. Increase the revenue producing potential of [Geriatric Care Management](#) and CYO Transportation and address the agency's deferred maintenance priorities ensuring adequate funding for quality programs and the safety of our clients and staff.
- As part of our accountability plan that supports our vision, mission and strategic priorities, we are developing a succession plan for [senior management](#) to ensure smooth and transparent agency transitions.
- Move select programs towards financial and organizational independence, benefiting clients by linking them with agencies who are experts in their field and the best possible providers for their individual needs.

#### Parish and Community Response

- Implement comprehensive plans for parish-based and community-based [CYO Athletics](#) and CYO Community Centers. We will continue to improve youth development and family support program excellence and identify mission-based programs that are sustainable without government funding.
- Establish a Rapid Response Fund and protocol to guide the use of immediate-needs funding. Resources will be allocated in a disciplined process to respond to mission-consistent parish, individual and/or local organization's episodic challenges.



- Develop and implement parish and community service plans for San Francisco, Marin and San Mateo counties. In concert with other community providers, we will deliver program plans that reflect each parish's unique needs.

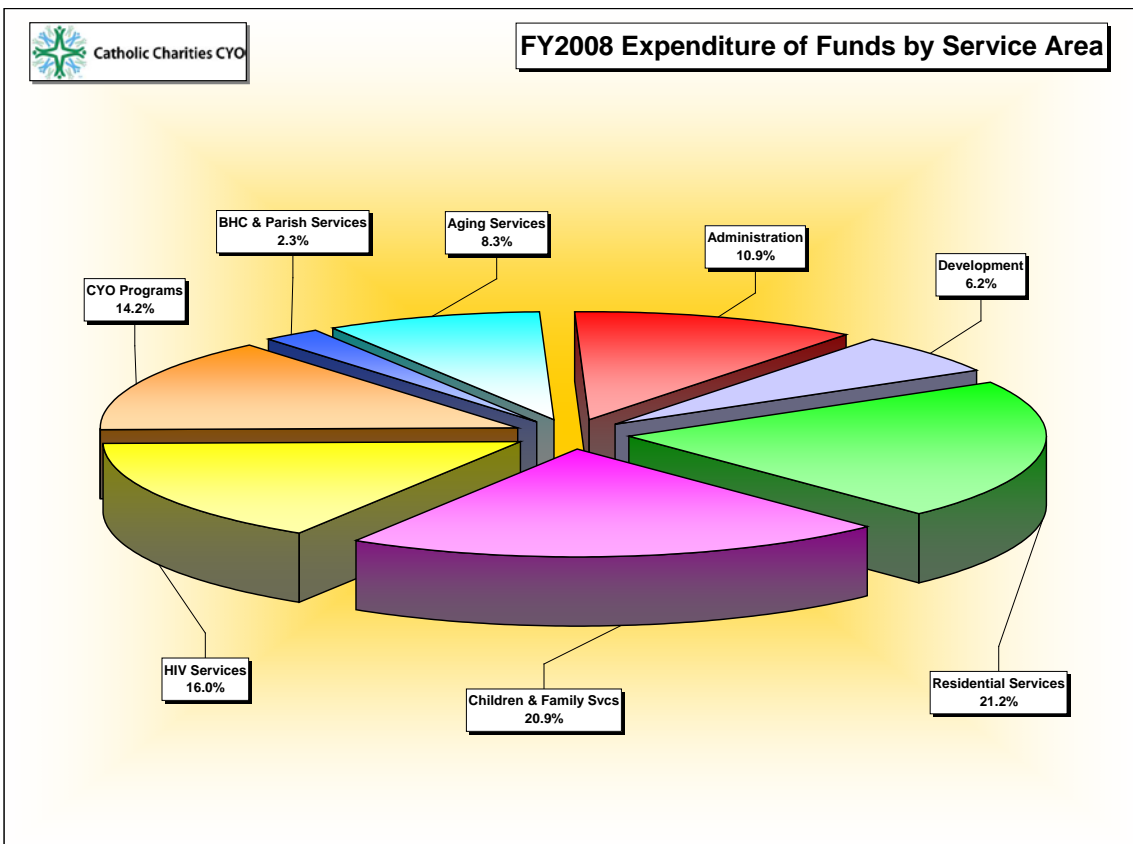
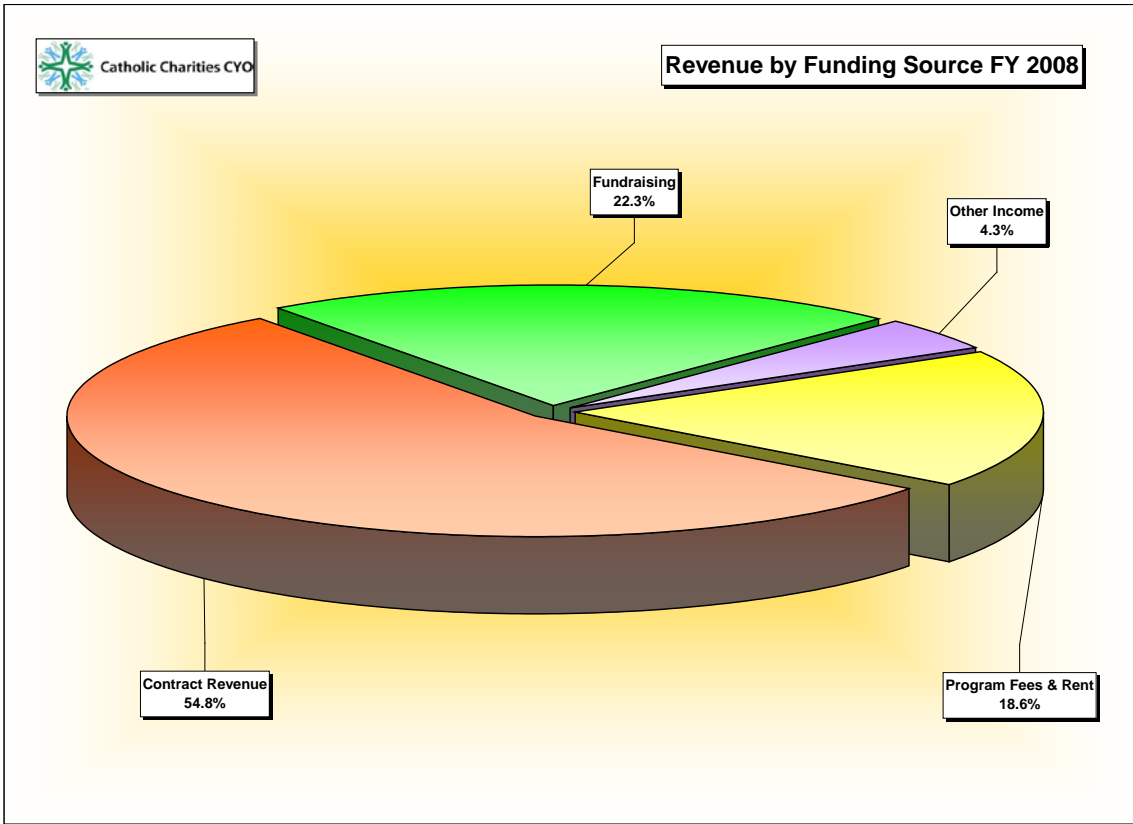
#### CYO Camp and Athletics

- Strengthen CYO Camp's program quality and position of value in Bay Area communities. Program enhancements will be realized at [CYO Summer Camp](#), [Caritas Creek](#) Environmental Education Program, and Retreat locations.
- Strengthen [CYO Athletics](#)' legacy of leadership and youth development. Facilities will be improved, and in some cases newly built, programs will be enhanced, and we will continue to build on CYO's superior reputation to ensure its viability and financial stability.

#### Our Mission into our Second Century

Founded in 1907 and rooted in our faith traditions of charity and justice, Catholic Charities CYO supports families, aging and disabled adults, and youth through social services and opportunities for healthy growth and development. Catholic Charities CYO is the social service agency of the Archdiocese of San Francisco, operating as an independent, non-profit organization. All contributed funds support Catholic Charities CYO, and do not support the operation of the Archdiocese.

**Figure 4: Budget Revenues and Expenditures**



**Figure 5: Organization Chart**

