

**Jesuit Social Research Institute
Annual Report
Institute - Non-Degree-Granting
AY 2011-2012**

1. Identification

The Jesuit Social Research Institute (JSRI) of Loyola University was formally established as a collaborative undertaking of the New Orleans Province of the Society of Jesus and Loyola University of New Orleans through a Memorandum of Understanding signed on November 28, 2007. JSRI exists to promote research, social analysis, theological reflection, and practical strategies for improving the social and economic conditions in the Gulf South with a particular focus on the issues of race, poverty, and migration. The Institute is intended to further the mission of the Society of Jesus to promote the faith that does justice, to apply Catholic social teaching to the concrete realities of these regions, and to enhance the academic and service missions of Loyola.

Mission

The Jesuit Social Research Institute works to transform the Gulf South through action research, analysis, education, and advocacy on the core issues of poverty, race, and migration. The Institute is a collaboration of Loyola University New Orleans and the Society of Jesus rooted in the faith that does justice.

Executive Summary of Activities 2011-2012

RESEARCH AND EDUCATION

Core Publications. In their third year of publication, staff and fellows produced four more editions of the *JustSouth Quarterly* at www.loyno.edu/jsri/justsouth-quarterly and five editions of the *JustSouth ENewsletter* at www.loyno.edu/jsri/justsouth-e-newsletter as concrete “deliverables” on their efforts at research, analysis, education, and advocacy focused on the five states of the Gulf South. The publications are demanding but help to keep staff focused and productive and increase JSRI visibility on campus and beyond. Our website is updated at least monthly, but often more frequently. In addition, JSRI maintains a Facebook page and Twitter account that is updated at least twice weekly. In December of 2011, JSRI reached an agreement with *The National Catholic Reporter* to write a social justice piece for their website and print publications every other month.

Educational Presentations

Staff participated in a number of educational presentations on campus, regionally, and nationally. See JSRI in the News: <http://www.loyno.edu/jsri/fifth-year-2011-2012>.

Outreach. Staff continued “liaison” visits to Texas, Louisiana, Mississippi, Alabama, and Florida to develop ongoing relationships with advocates, service providers, and researchers working on the issues of race, poverty, and migration. On each of the outreach visits staff gather more people to include within the JSRI network of readers.

Imprisoned, Forgotten, and Deported: Immigration Detention, Advocacy, and the Faith Community Conference. On October 13-14, 2011, JSRI partnered with the University of Florida Center for Latin American Studies, the Loyola University College of Law and the Stuart H. Smith Law Clinic and Center for Social Justice, the Loyola University Center for Latin American and Caribbean Studies, and the Roger Thayer Stone Center for Latin American Studies at Tulane University to present an in-depth look at the realities and character of immigration detention in the United States, particularly in the South. The conference was made possible by a grant from the Ford Foundation awarded to the University of Florida, and approximately 200 people attended the conference over the two days. Conference speakers and panels focused on: the economics of prison and immigration law; the politics and economics of immigrant detention; race, illegality, and detention; a liberationist response to immigrant detention; religious responses to detention; advocacy strategies; and changing the conversation in the public square. A survey of participants indicated a high level of satisfaction with the conference www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Evaluation%20Survey%20Summary.pdf

Roundtable Social Action Summer Institute [SASI]

In July, 2011, JSRI hosted, assisted in planning, and provided workshops for the 25th SASI, an annual gathering of Catholic social ministers from across the country hosted by the Roundtable Association of Catholic Diocesan Social Action Directors. Other cosponsors included the Archdiocese of New Orleans, Catholic Charities USA, Catholic Relief Services [CRS], JustFaith Ministries, and the United States Conference of Catholic Bishops Catholic Campaign for Human Development, and Justice, Peace & Human Development Secretariat.

Catholic Dialogues on Immigration

In conjunction with CRS and Catholic Charities New Orleans, JSRI led two Catholic dialogues on immigration at St. Anthony of Padua and St. Jerome parishes in an effort to bring together Catholics on different sides of the immigration issue to increase dialogue and understanding. Nearly 150 participants too part in one or both of the dialogues and on evaluations, all stated that the dialogue was a “valuable experience.” In the coming months, JSRI is planning to lead two more. See the two evaluation summaries at <http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Dialogue%20on%20Immigration-No1-StAnthony-Jan2012-dial.pdf> and www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Dialogue%20on%20Immigration-No2-StJerome-March2012-dial.pdf

ADVOCACY

Advocacy efforts included work on immigration detention, predatory payday lending, anti-immigrant state legislation, and the death penalty as spelled out in the paragraphs which follow.

Responsible stockholder initiative targeting immigrant detention prisons

The New Orleans Jesuit Province has purchased stock in Corrections Corporation of America [CCA] and The GEO Group (the first and second largest private prison

corporations in terms of U.S. operations) in support of human rights stockholder resolutions filed by the BVM and Ursuline Sisters. Most of GEO's and CCA's detention centers are in Louisiana, Texas, Florida and Arizona, and their headquarters are in Florida and Tennessee, both within the province boundaries. JSRI is providing research on human rights abuses in detention centers, and participating with the province in dialogues which have now begun with the companies. JSRI also received a large grant from the Langeloth Foundation to fund this initiative.

Payday Coalition

JSRI received a grant from the Foundation for Louisiana to continue work on building a statewide Louisiana coalition against predatory lending. Dr. Mikulich has been working to grow the coalition and it has begun strategic planning and will work to do a number of trainings over the next year. We hope that this will be the first of three years of funding from the Foundation for LA.

Death Penalty Coalitions

Dr. Mikulich continues to work with and staff two coalitions working on a five-year plan to inform and educate people on the death penalty in Louisiana in order to bring about legislative action to end the use of the death penalty in the state. The groups are: The Louisiana Coalition for Alternatives to the Death Penalty and Louisiana Catholics Committed to the Repeal of the Death Penalty. A key development this year was the completion by Dr. Mikulich and Sophie Cull of a white paper on the use of the death penalty in Louisiana entitled *Diminishing All of Us: The Death Penalty in Louisiana* at http://www.loyno.edu/jsri/sites/loyno.edu/jsri/files/Death-Penalty-in-Louisiana_Full-0312-rac.pdf

INSTITUTIONAL PLANNING AND ASSESSMENT

In FY12, JSRI staff, board, and university and community representatives completed JSRI's first three-year strategic plan. See No. 5, below, for details.

2. **Offices/Departments/Centers/Institutes (Non Degree-Granting) Summary & Assessment Results for Key Performance Indicators (KPIs)/Student Learning Outcomes (SLOs), where applicable**
(See Tables 2.1 through 2.6 located in the Appendix)

Please review the university-generated data where provided in the tables below for accuracy and input the requested information using the appropriate codes as indicated in each table. Please review the list of KPIs included for your area and add additional items where appropriate. Provide a summary of their results.

For sections 3-6 below, please respond to each part:

3. **Summary of Office/Department/Center/Institute Achievements and Committee Service**

A. *Awards/distinctions for your office/department/center/institute as a whole:* Over the past year, JSRI has been awarded four grants, including: a three year Langeloth grant to continue the work on socially responsible investing; a grant from the Foundation for the Mid South for general support for 1-3 years; a grant from the Foundation of Louisiana to help in the building of a payday coalition; and a Loyola Biever Lecture grant to host a lecture in Fall 2012 on Race, Poverty, and Election 2012 in light of Catholic Social Teaching.

B. *Individual JSRI personnel achievements:*

Fred Kammer, SJ: (1) received word that Indiana University Press has accepted for publication the book *Family, Friend, Foe? The Relationship between Religion and Philanthropy*, in which he has a chapter on Catholic Charities; (2) has a second chapter accepted by JustFaith Ministries for their new *Good News People* series, this one being on the impact of Catholic social ministries in shaping America [a first chapter on Scripture and Poverty had been accepted in FY11]; and (3) in November, 2011, completed three years of work with the Executive Committee of *Caritas Internationalis* in Rome in moderating its meetings to completely revise its Statutes and Internal Rules.

Dr. Alex Mikulich: (1) completed a white paper on the use of the death penalty in Louisiana entitled *Diminishing All of Us: The Death Penalty in Louisiana*; (2) has a chapter on race and economic justice accepted by Anselm Academic for the book to be entitled *The Almighty and the Dollar: Reflections on Economic Justice for All*; and (3) has secured a contract with Palgrave MacMillan for a co-authored, peer-reviewed book entitled *The Scandal of White Complicity in U.S. Hyper-incarceration: A Nonviolent Spirituality of White Resistance*.

Community Engagement activities/achievements:* the publications of the Institute (the *JustSouth Quarterly* and the *JustSouth E-news*) are sent to 1700 persons outside the university, including: bishops, Catholic Charities directors, directors of offices of justice and peace, directors of migration services, community advocates, and researchers across the five states of the Gulf South and elsewhere. Staff also have addressed a number of student and other volunteer groups coming into New Orleans to assist in the post-Katrina cleanup and rebuilding on the social analysis and theological reflection of the problems of race, poverty, and migration in the South and the New Orleans area. Staff also have worked with the Louisiana Catholic Conference and the two Catholic dioceses of Mississippi to successfully oppose anti-immigrant legislation. Staff also work with the Justice for Immigrants campaign committee of the Archdiocese of New Orleans, Catholic Charities of New Orleans, Catholic Relief Services, the anti-racism task force of Pax Christi USA, Caritas Internationalis [Rome, Italy], and other groups active on matters of race, poverty, and migration.

C. University Committee Service (including: *Task Forces and Special Initiatives*) and Strategic Alignment:

Dr. Sue Weishar –

- President’s Interfaith and Community Service Challenge Workgroup (Mission and Ministry) [UI]
- Service Learning Course Development Stipend Search Committee (Service Learning) [ED]
- JSRI Strategic Planning Team [UI]
- Presented guest lectures in a number of classes [OT]

Dr. Alex Mikulich

- JSRI Strategic Planning Team [UI]
- Presented guest lectures in a number of classes [OT]

Fr. Fred Kammer, SJ

- Justice in Jesuit Higher Education task force for Loyola report to the AJCU [UI]
- Participate in the CSS Center and Institute Directors Group [SG]
- Work with Institutional Advancement on Grant Proposal developments [UR]
- Presented guest lectures in classes [OT]
- Provided lecture in Alumni College [ST]
- Working with University Ministry in preparation of “Spark” program for FY13 incoming freshmen [ST]
- Worked with Center for the Study of New Orleans on “Food and Justice” Conference [ST]
- Works regularly with University Ministry in presiding and preaching at Ignatius Chapel, as well as preaching at the College of Law commencement Mass and the student Awakening Retreat [ST]
- JSRI Strategic Planning Team [UI]

¹ University Committee Service Codes:

Strategic Alignment: For each faculty member and staff member (where applicable) note service on university committees/task forces/special initiatives for all levels & strategic areas that apply.

CODE: Strategic alignment

ED – Educational Mission, Curricular Decision-Making, Enhancement of Learning (e.g., curricular development/revision, community-engaged learning/research (i.e., service learning), and pedagogical innovations (e.g., CFI workshops), etc.) [Examples of University committees in this category may include SCAP, SCCC, Grad Council, Online Educ. Cmt., Prof. & Con Studies Cmt., FR Seminar Cmt., Honors Advisory Board.; example of college level is college curricular cmts.]

ST – Student Enrollment/Relations/Co-curricular Programming (e.g., recruitment & admissions related activities, student success (retention activities), and alumni relations and co-curricular initiatives and events)

SG – Shared Governance (University: committees such as Faculty Senate, Strategic Planning Cmt., UBC, URTC; College: strategic planning cmts., CRTC, etc.)

UR – University Reputation (e.g., presentations at national higher education conferences, developing grant proposals to improve educational programs, etc.)

UI – University Identity (Enhancement of Jesuit Values, e.g., work with Mission & Ministry, JSRI, and community-engaged service)

OT - Other

4. Budget for AY2011-12

- Narrative: the initial budget prepared for this year reflected belt-tightening necessitated by the continuing lower endowment income from the University and the Jesuit Province. Without significant fundraising success, we potentially faced a year-end deficit of approximately \$2,354, even after using our small surplus and eliminating any conference or training opportunities for staff and reducing travel expenses for outreach and projects. A \$10,000 grant from the Dean, CSS, was a significant buffer against even great deficits.
- However, successful fundraising proposals developed in the latter part of FY11 and the first part of FY12 brought in designated income of \$25,000 (\$12,500 for FY12) from the Foundation for Louisiana for our payday loan project and \$25,000 in general support (for a year beginning 3/1/12) from the Foundation for the Mid-South. This eliminated the projected deficit, allowed us to restore certain expense line items, and to restore our administrative assistant to a full-time position. In addition, during FY12 we received word of a \$152,000 designated grant from the Langeloth Foundation for three years beginning 7/1/12, which will provide some cushion for the next three years in addition to needed consultants for the private prison project.

FY11-12 Actual Income			FY11-12 Budgeted Income		
Undesignated	Designated	Total	Undesignated	Designated	Total
\$296,374.25	\$12,916.56	\$309,290.81	\$299,500	\$447.35	\$299,947.35

FY11-12 Actual Expenditures			FY11-12 Budgeted Expenditures		
Undesignated	Project Expenses	Total	Undesignated	Project Expenses	Total
\$304,604.18	\$4,429.41	\$309,033.59	\$300,629	\$3,000	\$303,629

5. Strategic planning and goals for AY 2011-12

Beginning in September of 2010, JSRI recruited a task force made up of Loyola and community representatives, in addition to staff and board members, to construct a three year strategic plan. JSRI then underwent an intensive strategic planning process, including SWOT analysis, workgroups, board input, and a revision of JSRI's mission, vision, and values. The final plan was approved by JSRI's advisory board in March 2012. The steps in the planning process and the persons involved are laid out in detail on pages 14-15 in the plan at <http://www.loyno.edu/jsri/sites/loyno.edu/jsri/files/PLAN-FINAL-06-28-12-plan.pdf>

The six draft strategic directions and goals are as follows:

Strategic Issue 1: Key Relationships

JSRI MUST IDENTIFY KEY RELATIONSHIPS AND HOW BEST TO DEVELOP AND SUPPORT THEM.

- Goal 1: JSRI will improve relationships with Loyola University – students, faculty and staff, and other areas of campus life.
- Goal 2: JSRI will increase relationships with Jesuit communities, Jesuits and Jesuit works.
- Goal 3: JSRI will work in collaboration with Catholic entities – State Catholic Conferences, social service and advocacy leaders, educators and pastoral leaders, and media – to enhance and support their work for social justice.

Strategic Issue 2: Research, Analysis, and Education

JSRI, WORKING IN COALITIONS WHERE APPROPRIATE, WILL CONTINUE TO DEVELOP ACTION-ORIENTED, FAITH-INFORMED, INNOVATIVE RESEARCH, ANALYSIS, AND EDUCATION THAT WILL CHANGE POLICIES (GRASSTOPS) AND MINDS AND HEARTS (GRASSROOTS).

- Goal 1: JSRI will engage in action-oriented, faith informed, innovative research and analysis on race, poverty, and migration and their intersection.
- Goal 2: JSRI will engage in action-oriented, faith informed, innovative education on race, poverty, and migration and their intersection, rooted in Catholic social thought.
- Goal 3: JSRI will engage in action-oriented, faith informed, innovative advocacy on race, poverty, and migration at the local, state and national level [alone and in coalition].

Strategic Issue 3: A Distinctive Regional Voice

JSRI WILL IMPLEMENT STRATEGIES TO BECOME KNOWN AS THE LEADING REGIONAL VOICE ON THE APPLICATION OF CATHOLIC SOCIAL TEACHING TO THE ISSUES OF RACE, POVERTY AND MIGRATION AND THEIR INTERFACE.

- Goal 1: JSRI continually gathers and updates information and analyzes current realities of race, poverty, and migration in the Gulf South in light of the faith that does justice.
- Goal 2: JSRI will continue and improve its current means of communicating on issues including the *JustSouth Quarterly* and *E-newsletter*.
- Goal 3: JSRI will identify and nurture key press and media connections.
- Goal 4: JSRI will explore the use of new social media as a primary means of increasing “3-way communication” (JSRI plus its contact plus people to whom information might be forwarded by them).

Strategic Issue 4: Walking the Walk

JSRI WILL WORK TOWARD BECOMING AN ORGANIZATION THAT REFLECTS ITS MULTI-CULTURAL, ANTI-RACIST, AND ANTI-POVERTY COMMITMENT.

- Goal 1: Together with at least one other center, institute, or department at Loyola, JSRI staff will engage in the training by the Pax Christi Anti-Racism Team which is designed specifically for Catholic entities.
- Goal 2: JSRI will establish some way for JSRI staff as a group to have a regular structured interaction with persons who are poor, culturally and racially diverse, and vulnerable.

Strategic Issue 5: Testing Transformational Methods

JSRI WILL RESEARCH, DESIGN, AND TEST ALTERNATIVE METHODS FOR TRANSFORMING HEARTS AND MINDS FOR SOCIAL ACTION AND SOLIDARITY ON THE THREE FOCAL ISSUES OF RACE, POVERTY, AND MIGRATION.

- Goal 1: JSRI will organize and facilitate dialogues using a peace-building model for conflict transformation among Catholics with different views on our issues.
- Goal 2: JSRI will offer to lead social analysis and theological reflection for groups participating in domestic immersion experience or providing direct service on a regular basis.
- Goal 3: JSRI will offer to work directly with the faculty, staff, and students of one of the high schools in the New Orleans Jesuit province to explore and implement methods of increasing students' commitment to justice as described in "The Profile of the Jesuit Graduate." (JSRI's specific role in this process is to be a stimulus.)

Strategic Issue 6: Financial Sustainability and Growth

JSRI WILL DEVELOP ADEQUATE FINANCIAL RESOURCES TO SUSTAIN AND GROW ITS CORE STAFF, INCREASE ITS ENDOWMENT, AND ATTRACT NEW FUNDING FOR PROJECTS AND PROGRAMS.

- Goal 1: JSRI will seek outside funding to build development capacity within the organization within two years, e.g. a full-time development staffer or a "share" in a grant-writer.
- Goal 2: JSRI will expand the scope of its fundraising activities in our 5 states and elsewhere to new and targeted audiences and develop targeted approaches to each.
- Goal 3: JSRI will explore and employ a variety of ways to expand income-generating activity.
- Goal 4: JSRI will engage its Advisory Board more actively in developing the financial capacity of the organization.

6. General statement on how assessment has been conducted within the unit during AY 2011-2012

Assessment within JSRI is conducted in a variety of ways. Some *events* are assessed using feedback forms with participants. For example, in our Fall 2011 conference on immigration detention, our co-sponsors at the University of Florida developed a *SurveyMonkey* which was completed subsequent to the conference by forty-four of the participants. [See links on page 2.] Participants at the Catholic Dialogues on immigration submit written evaluations of the sessions. In recent months, fellows have begun using a uniform evaluation form filled out by audiences at their presentations.

Our *research projects* are assessed by the Board of Advisors of JSRI, who meets twice a year. Project proposals are submitted to the board in writing and project updates are presented by the fellows at each board meeting to solicit ongoing board input and advice. The board members also evaluate each of its meetings in writing. Participants in the responsible shareholder dialogues (face-to-face or by conference call) with private prison management evaluate the dialogues after each session. Death penalty and payday coalitions are engaged in ongoing evaluation and action planning as their work progresses.

Monthly *staff meetings* also contain assessment pieces regarding the work of the fellows, and institute events are discussed regularly by the members at a three-hour monthly meeting.

The board, staff, and community, university, and other participants have completed JSRI's first comprehensive *three-year strategic plan*. It includes Mission, Vision, Values and six strategic issues, for each of which there are specific goals, tactics, persons responsible, and timelines (person responsible and timelines were developed at lengthy staff meetings on December 12, 13, and 19, 2011). Regular reporting on the progress on the plan is conducted at monthly staff meetings and will be built into reports to the semi-annual meetings of the Advisory Board.

Assessment of our *JustSouth E-newsletter* includes a review of the number of recipients who open the newsletter, click through it, and what items they review—information available from *MyEmma*. We also compare the responses over time, looking at the number of persons in each category—students, faculty-staff, and the wider community—who open and click through the e-news. See attached comparative report of the past five e-newsletter readers at <http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Enews-Responses-five%20mailings-2011-12-jse.pdf> and more detailed statistical report on the most recent e-news readership divided into three sub-groups: JSRI external list, Loyola faculty-staff, and Loyola students, found at <http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Enews%20Response-three%20lists-0812-jse.pdf>

We have also received reports from the web-team through Google on the number of “hits” on our *website*. We also track our followers/viewers on twitter and *Facebook* and have weekly *Facebook* viewer statistics. In the fall of 2012 we will conduct a reader survey concerning our *JustSouth Quarterly*.

Regular evaluation of the overall work of JSRI also takes place in the annual performance appraisals of the director and fellows, as well as in six-month interviews by the director with the fellows.

Reports to funders are also another way in which JSRI assesses its work—our most recent interim report was submitted on-line to the Foundation for Louisiana at the half-way mark in the first year of its funding of our predatory payday lending project. See <http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/FDN%20for%20LA-JSRI%20interim%20report-6%2030%2012-dev.pdf>

KEY PERFORMANCE INDICATORS

Research

General: The institute conducts, gathers, and publishes research on social and economic conditions of the poor, migrant, and ethnic communities in the Gulf South, including factors affecting the movement of migrants and immigrants into and across the region. This research is focused through the lens of Catholic social thought and core Jesuit values—the service of faith, promotion of justice, dialogue with world religions and cultures.

Current action-research projects: Current action-research projects focus on: payday loans in Louisiana; the death penalty in Louisiana; responding to state anti-immigrant legislation in Louisiana, Mississippi, and Alabama; and a responsible shareholder initiative, with a coalition of religious investors, to have the two largest private prison corporations in the United States adopt and implement Human Rights policies and practices to better protect the persons in their custody, many of whom are in the South.

Key Performance Indicator No. 1: Staff will report semi-annually to the JSRI Advisory Board on the progress of its work on the ongoing action-research projects, soliciting from the board members questions and recommendations regarding the projects. Particular assessment: In FY12, this took place at two-day Advisory Board meetings in November 2011 and March 2012.

See also Indicators No. 2 and 3, below, for indicators applying to both research and education.

Education

General: Institute staff and collaborators disseminate this research and analysis and education on Institute core issues and Catholic Social Teaching through a variety of means.

Key Performance Indicator No. 2: Staff will publish four issues of the *JustSouth Quarterly* addressing issues of race, poverty, and migration, especially in the Gulf South. Particular assessment: In FY12, the number of recipients of the mailed quarterly increased from 1180 persons to 1335, in addition to those distributed on campus or by hand.

Key Performance Indicator No. 3: Staff will publish five-seven issues of the *JustSouth E-newsletter* addressing the core issues of race, poverty, and migration and including links to key studies by other organizations and governmental bodies on its core issues and on Katrina recovery and other issues pertinent to the New Orleans area. Particular assessment: In FY12, JSRI published five issues of the e-news, instead of a planned six, due to the shutdown of new projects for the office of Information Technology for the month of January while they attended to other university priorities.

Key Performance Indicator No. 4: Staff will work with the University of Florida Center for Latin American Studies and Initiative for Immigration, Religion, and Social Change, the Loyola University College of Law and Stuart H. Smith Law Clinic and Center for Social Justice, and other entities to present a conference on immigration detention, advocacy, and the faith community in the fall of 2011. Particular assessment: In FY12, after the completion of the conference, the survey of participants indicated that a strong majority were “very satisfied” with the overall conference. [See link on page 2.]

Advocacy

General: JSRI staff, collaborators, and stakeholders engage in advocacy on social and economic issues through providing testimony to legislative bodies, meeting with legislators and staff members of the region, and conducting public events such as hearings and press conferences.

JSRI offers assistance to other advocates by providing background research for testimony and undertaking campaigns promoting values such as the common good and the preferential option for the poor, and by integrating public ethics into the fostering of public policy.

Key Performance Indicator No. 5: The *JustSouth Quarterly* and *JustSouth E-newsletter* will include a focus on current legislative and administrative issues and initiatives dealing with poverty, race, and migration in the region, the nation, and in sending countries. Particular assessment: In FY12, issues of the *JustSouth Quarterly* and the *JustSouth E-newsletter* continued to focus on advocacy issues in the region and nationally; issues can be reviewed on the JSRI website under “publications” at <http://www.loyno.edu/jsri/publications>

Key Performance Indicator No. 6: JSRI staff and associates will work actively with Catholic and other advocates this year to oppose state anti-immigration initiatives. Particular assessment: In FY12, JSRI staff and associates worked with advocates to repeal the harsh Alabama anti-immigrant law, which was unsuccessful, and to oppose the anti-immigrant bill in Mississippi—which passed the House and was died in the Senate. Bishop Joseph Latino of the Catholic Diocese of Jackson wrote to JSRI on April 26, 2012 in regard to the work of Father Kammer and Dr. Weishar as follows: “Thanks to your efforts and the combined efforts of the religious community, business and law enforcement, this legislation was defeated. Your support and technical assistance was invaluable.” Dr. Weishar also conducted qualitative interviews with key spokespersons for law enforcement and others who opposed the bill and reported on these in the summer, 2012, issue of the *JustSouth Quarterly* found at <http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Summer%202012-Mississippi%20Rejects%20Immigration%20Enforcement%20Bill.pdf>

Key Performance Indicator No. 7: JSRI staff will continue advocacy coalition-building in preparation for legislative initiatives in Louisiana in regard to payday predatory lending and capital punishment. Particular assessment: In FY12, coalition building efforts continued, including the completion of the white paper on the death penalty in Louisiana, found at http://www.loyno.edu/jsri/sites/loyno.edu.jsri/files/Death-Penalty-in-Louisiana_Full-0312-rac.pdf and the completion in June of a strategic action plan by the new statewide coalition on predatory payday lending at a planning session led by Dr. Mikulich and JSRI Associate Mary Baudouin.

Key Performance Indicator No. 8: JSRI staff and associates will continue advocacy work in support of a responsible investor coalition working to improve human rights in private prison corporations. Particular assessment: In FY12, work with Corrections Corporation of America has included two formal dialogues and presentations at the CCA shareholders annual meeting. With regard to GEO, when formal dialogue failed, the shareholder resolution was re-filed, Dr. Weishar and Ms. Baudouin did presentations at the shareholders annual meeting, the resolution garnered 29% of the shareholder vote at its first appearance in May, 2012; and management has agreed anew to enter into formal dialogue with the religious investors.

Organizational Mission and Advancement

General: As a young organization now only completing its fifth year, JSRI needs to develop further its planning function and to increase financial support for the organization and its projects.

Key Performance Indicator No. 9: JSRI will complete its first three-year strategic plan and develop the action steps and accountability process in beginning its implementation. Particular assessment: In FY12, JSRI completed its comprehensive first three-year strategic plan with its formal approval at the Advisory Board Meeting of March 16-17th.

Key Performance Indicator No. 10: JSRI will work with Loyola's Institutional Advancement staff to develop and submit funding proposals for both the general support of the organization and specific action-research projects. Particular assessment: In FY12, JSRI successfully was awarded: a \$25,000 grant from the Foundation for Louisiana for its predatory payday project, hopefully the first of three years; a \$25,000 grant from the Foundation for the Mid-South, again hopefully the first of three years; and a \$152,000 grant for three years for its responsible shareholder private prisons project.

LEARNINGS AND THEIR APPLICATION:

Several examples should suffice for how our assessments are used in the work of JSRI which is not easily measured in terms of statistical data, especially in our advocacy work:

State Anti-immigrant Legislation: in the wake of the experience of our Alabama associate, Fr. Ted Arroyo, SJ, in unsuccessfully opposing the passage of Alabama's 2011 statute, we determined that JSRI should offer its assistance to advocates in both Louisiana (as done in prior years) and Mississippi. We accepted an invitation of the Mississippi dioceses to speak (Fr. Kammer) against anti-immigrant legislation at the second annual Catholic Day at the Capitol, prepared written materials for advocates, authored an article in the Catholic newspapers (Dr. Weishar), strategized with Catholic and other advocates, and urged them to broaden their outreach to business and agriculture in the state. After the successful intervention of police, local political authorities, the farm bureau, and business helped to defeat the Mississippi bill, Dr. Weishar conducted in-depth interviews with representatives of these and other groups and wrote them up in an analysis in the summer 2012 *JustSouth Quarterly*, found at <http://www.loyno.edu/jsri/sites/loyno.edu/jsri/files/Summer%202012-Mississippi%20Rejects%20Immigration%20Enforcement%20Bill.pdf> in hopes that the lessons learned would be helpful to advocates in Mississippi and in other states as well.

Predatory Payday Lending: After lenders successfully "gutted" a bill which would have required certain reporting requirements by payday lenders, Dr. Mikulich worked with the steering committee of Louisiana United for Fair Lending, the payday coalition which he has formed, to study what happened and to underscore the importance of a multi-year organizing and education campaign to build the capacity of consumers and advocates hopefully to pass corrective legislation in the future.

Private Prison Shareholder Advocacy: After initially withdrawing their 2011 shareholder resolutions [to promote the adoption of human rights standards, monitoring, and reporting in the two largest private prison corporations in the U.S.] in response to management’s agreement to enter into formal dialogue, the shareholders found that the GEO management would only consent to a single telephone conference “dialogue.” Subsequently, the shareholders—with whom Dr. Weishar and Ms. Baudouin work—re-filed the GEO resolution, then having learned from GEO action, refused to withdraw it in 2012 upon another promise to dialogue. Their representatives attended the shareholder annual meeting in May, 2012, received 29% of the shareholder votes in favor of the resolution (well beyond the SEC minimum to return in 2013 for a further vote), and the GEO board’s subsequent resolution to enter into formal dialogue.

Annual Conferences: Each year JSRI staff carefully reviewed their fall conference, participants’ feedback, and likely impact and re-designed their activity for the following fall. After the October 2011 conference on detention visitation, our consideration of the time, effort, and costs involved have indicated that in the fall of 2012 we should try a single presentation with respondents. We subsequently applied for and received a Biever Lecture grant to bring in a distinguished theologian to address the issues of race, poverty, and election 2012 in the light of Catholic Social Teaching.

7. Supportive Documents

- Supply all source documentation referenced in your Annual Report (e.g., post relevant office/department/center/institute meeting minutes as well as copies of any tools such as surveys, interview protocols, test or portfolio evaluation rubrics, etc.) that the office/department/center/institute uses to collect and evaluate data about key performance or student learning achievement.
- Provide copies of any office/department/center/institute-generated reports in which you summarize assessment results and decision-based unit actions in AY 2011-12.
- Where applicable, provide supporting documentation that demonstrates *full-circle* planning, assessment, reflection, and action (i.e., continuous process of improvement) such as proposals for new courses/programs, proposals for course or program revisions/enhancements, and any other office/department/center/institute-generated reports in which you summarize assessment results and information/data-based unit actions in AY 2011-12 including evidence of improvement stemming from follow-up studies of actions taken before AY 2011-12.

APPENDIX

Table 2.1: List of all Personnel and Associated Position Titles 2011-2012

Data Source: HRS

A. <u>List Name of Personnel</u> (Last Name, First Name, MI)	B. <u>Personnel</u> <u>Employment Status</u>	C. <u>Position Title</u>
	CODE: • Full-time (FT) • Part-time (PT)	

Kammer, S.J., Alfred C.	FT	Director
Mikulich, Alexander	FT	Research Fellow
Weishar, Susan M.	FT	Migration Specialist
Schott, Christina M.	FT	Administrative Assistant III
Arroyo, S.J., Edward B.	Unsalariated	Alabama Associate
Baudouin, Mary A.	Unsalariated	Province Liaison

Table 2.2: Non Academic Offices, Departments, Centers, & Institutes Personnel Headcount by Status Over Last Four Academic Years

Data Source: HRS

Personnel Headcount	AY 08-09 No.	AY 09-10 No.	AY 10-11 No.	AY 11-12 No.
FT	4	3	3	4
PT	0	1	1	0
Total FTE	4	3	3	4

FTE Personnel: Fulltime Equivalent Personnel = FT Headcount + 1/3*PT Headcount

Table 2.3: Non Academic Offices, Departments, Centers, & Institutes - Aggregated Results on Relevant Surveys (e.g., 2011 Graduating Student Survey, Course Evaluations, SSI, IPS, ASPS, NSSE, and FSSE)*

Relevant Survey/Items	University Mean
Not applicable.	

Table 2.4: Non Academic Offices, Departments, Centers, & Institutes - Other In-House Studies/Inventories and Outside Reviews

Relevant Survey Items/Studies	Mean Comparison Scores (if applicable)
Results of Office/Department/Center/Institute In-House Studies/Inventories*** Other Results of Surveys/Studies*** (Outside Reviews/ Accreditation Reports)	

* University Survey data results disaggregated by departments may also be accessed on the OIRE Web site

** On university surveys select only the items on the survey that are most relevant to your office/department/center/institute

*** Summarize data results of studies originated by your office/department/center/institute