

**Standing Committee on Academic Planning  
Jesuit Social Research Institute (JSRI)  
Self-Study Report  
September 17, 2014  
Fred Kammer, SJ, Executive Director**

**I. MISSION AND VISION**

**A. Mission**

**Mission Statement of Loyola University**

Loyola University New Orleans, a Jesuit and Catholic institution of higher education, welcomes students of diverse backgrounds and prepares them to lead meaningful lives with and for others; to pursue truth, wisdom, and virtue; and to work for a more just world. Inspired by Ignatius of Loyola's vision of finding God in all things, the University is grounded in the liberal arts and sciences, while also offering opportunities for professional studies in undergraduate and selected graduate programs. Through teaching, research, creative activities, and service, the faculty, in cooperation with the staff, strives to educate the whole student and to benefit the larger community.

**Mission of the College of Social Sciences**

Loyola University New Orleans' *College of Social Sciences* is committed to linking educational excellence with social justice. The College is distinguished by its diversity, innovation, and commitment to offering a full range of high quality educational opportunities, fostering the discovery and dissemination of new knowledge by supporting research, scholarship and creative activity, and applying existing knowledge to address social and environmental problems in the city, state, national, and global communities.

Honoring the Jesuit vision of education, the College of Social Sciences strives to offer a rigorous value-based education that epitomizes "thinking critically, acting justly."

**Mission of JSRI**

*Within the College, the JESUIT SOCIAL RESEARCH INSTITUTE (JSRI) was founded in 2007 as a collaborative between Loyola University and the New Orleans Province of the Society of Jesus to promote research, social analysis, theological reflection, and practical strategies for improving the social and economic conditions in the five Gulf South states with a particular focus on issues of race, poverty, and migration. The Institute aims 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 this region, and to enhance the academic and service missions of Loyola. The JSRI Mission Statement, approved by its Advisory Board as part of its 2012 Strategic Plan reads:*

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.

## **B. Loyola's Vision and the Role of JSRI**

### *Loyola's Vision:*

As a Catholic, Jesuit University, Loyola University New Orleans is an academic community dedicated to the education of the whole person. By thinking critically, acting justly students are to embody the Ignatian ideals of faith, truth, justice, and service. To meet these goals, the University will strive to become an increasingly selective university with outstanding liberal arts and sciences, professional, and graduate programs grounded in intellectual rigor and reflecting the more than 450 year Ignatian tradition.

### *JSRI:*

To further the university vision, JSRI focuses its research, education, and advocacy activities to apply Catholic social principles to transforming New Orleans and the Gulf South region. In its publications—the *JustSouth Quarterly* and the *JustSouth E-newsletter*—and by the work of its fellows and associates, JSRI connects Loyola students, faculty, and staff, Jesuit ministries in the South, and Catholic and other regional advocates with the latest research on migration, poverty, and racism in order to foster more informed and committed action. By linking Loyola University to the network of Jesuit and other religious social centers and advocates in the United States and abroad and to other universities and research centers and advocates, JSRI strives to become a unique regional resource that combines academic research, education, and social action in a new paradigm based on the union of faith and justice, of critical thinking and just action.

## **II. ALIGNMENT WITH THE UNIVERSITY STRATEGIC PLAN**

The values spelled out in Loyola's 2009 Strategic Plan emphasize *intellectual rigor, an appreciation for diversity, engagement with the world, and promotion of critical thinking and just action by students, faculty, and staff*. The Plan underscores overarching strategies that *enhance Jesuit values and enhance reputation and stature* of the university.

- Specifically, the Plan urges attention to *programs that are distinctive in subject matter and that are cross-disciplinary*—reflected in the distinct focus of JSRI on poverty, race, and migration and its method combining social analysis and theological reflection with practical responses.
- Further, the Plan stresses Loyola's *location in New Orleans, the South, and our proximity to Latin America*. JSRI's five-state strategy, its active engagement with immigration issues and immigrant advocacy in the South, and its existing connections to Jesuit networks in the Caribbean, Mexico, and Central America can further Loyola's stature in New Orleans, the South, and with wider publics. As the Plan notes, *The University has been studying such opportunities for years, and it is time to move on some opportunities. Throughout the southern region of the U.S., ours is the only Jesuit University, serving the Catholic community's higher education needs*.
- The July 31, 2014 merger of the New Orleans Jesuit Province with the Missouri Jesuit Province to form the new US Central and Southern Province which includes Belize and has an active twinning relationship with the Central American Jesuit Province.

To become a unique regional resource, JSRI has taken critical steps towards building its capacity and credibility *at the intersection of Loyola, church, civil society, and the Gulf South*:

1. The inauguration of the *JustSouth Quarterly* in April, 2009 and its dissemination now to 1500 leaders in church and charities ministries, Jesuit educational and other works, advocacy centers, academic institutions, and in the Loyola community.
2. The inauguration in May, 2009 of the *JustSouth E-Newsletter* which has been sent to 7,000 recipients, including *Quarterly* recipients and all of the faculty, staff, and students of Loyola University. In October, 2013, the e-newsletter was transformed to the *JustSouth Monthly* and changed in format. It continues to be distributed to 7,000 recipients including all Loyola faculty, staff, and students.
3. Annual conferences and speakers on campus including: *Faithful Citizenship: A Call to Political Responsibility* [October, 2008]; *People on the Move and the Common Good: Migration, Poverty, and Racism: Converging Concerns for our Future* [October and November, 2009]; *Post-Katrina New Orleans: A Welcoming Community?* [October, 2010]; *Imprisoned, Forgotten, and Deported: Immigration Detention, Advocacy, and the Faith Community* [October, 2011; held at the College of Law; co-sponsored by the University of Florida, Tulane University, and other Loyola centers]; *Election 2012: With Liberty and Justice for Some? Race, Poverty, and Catholic Social Thought*—Rev. Bryan Massingale, Ph.D., with respondents Dean Maria Pabón López of the College of Law and Dr. Peter Burns, Political Science Department [September, 2012 Biever Lecture]; *Preventing Human Trafficking at the Superbowl and Beyond* [October, 2012, co-sponsored by various Loyola centers]; *An Evening with Sister Helen Prejean: Christians as Catalysts Against the Death Penalty* [January, 2013, with local faith community co-sponsors]; *The Scandal of White Complicity in U.S. Hyper-incarceration: A Nonviolent Spirituality of White Resistance* [April, 2013, with Dr. Mikulich and his co-authors]; *Jesus on Trial* [November 8, 2013; held at College of Law; co-sponsored by Office of Mission and Ministry]; and we are co-sponsoring at the University of Florida *Immigration Reform and Beyond? The 5<sup>th</sup> Conference on Immigration in the US South* [October, 2014].
4. A five-state Gulf South strategy which enlists each of the staff in a specific liaison responsibility to organizations and individuals in a state in our region for purposes of mutual education, networking, and collaboration, as well as rooting the work of the institute in local realities. The reality is that most such work has been focused in the three central states—Louisiana, Mississippi, and Alabama.
5. In collaboration with a number of organizations, JSRI has an advocacy agenda approved annually by its Advisory Board which includes: payday lending, death penalty, comprehensive immigration reform, Medicaid expansion, and minimum wage, as well as a complex multi-year shareholder advocacy initiative focused on human rights in the largest two private prison corporations in the United States.
6. Annual presentations on campus by the JSRI fellows, e.g. in AY14, fellows provided ten presentations on campus on its core issues of race, poverty, and migration and on Catholic social thought.
7. Presentations and training provided by staff off-campus to a number of groups across the region and across the nation. In AY14, there were forty such presentations.

8. Development of important linkages for its regional migration work with the US Jesuit Conference, the Stone Center for Latin American Studies at Tulane University, Jesuit Migration Service of North and Central Latin America, Jesuit Refugee Service [JRS] USA, JRS of Panama, and two Central American Jesuit universities.
9. Recruitment of a twelve-member Advisory Board—appointed by the Loyola President and the Jesuit Provincial—that combines civil and religious advocates, multi-state participants, church leaders, civic activists, and university representatives to assist with the multiple issues and geographical areas of JSRI’s mission and activities.

### **III. DEMAND FOR THE INSTITUTE**

#### *A. From the Jesuits*

For more than forty years, Jesuit authoritative sources have recommended the creation of centers capable of rigorous social analysis and theological reflection leading to action to transform society in the interest of justice and peace. Some examples are:

#### **The 32<sup>nd</sup> Jesuit General Congregation: *Our Mission Today***

“We cannot be excused from making the most rigorous possible political and social analysis of our situation. This will require the utilization of the various sciences, sacred and profane, and of the various disciplines, speculative and practical, and all of this demands intense and specialized studies. Nothing should excuse us, either, from undertaking a searching discernment into our situation from the pastoral and apostolic point of view. From analysis and discernment will come committed action; from the experience of action will come insight into how to proceed further.” [Rome, 1975, no. 44]

#### ***The Service of Faith and the Promotion of Justice in American Jesuit Higher Education, Santa Clara Lecture, by Jesuit General Superior, Peter-Hans Kolvenbach, SJ***

“To make sure that the real concerns of the poor find their place in research, faculty members need an organic collaboration with those in the Church and in society who work among and for the poor and actively seek justice. They should be involved together in all aspects: presence among the poor, designing the research, gathering the data, thinking through problems, planning an action, doing evaluation and theological reflection. In each Jesuit Province where our universities are found, the faculty’s privileged working relationships should be with projects of the Jesuit social apostolate—on issues such as poverty and exclusion, housing, AIDS, ecology and Third World debt—and with the Jesuit Refugee Service helping refugees and forcibly displaced people.” [October 6, 2000]

#### **Social Justice Secretariat, Rome, *Jesuit Social Centres: Structuring the Apostolate*, Father Peter-Hans Kolvenbach, SJ:**

“I would like here to stress again the need to bring greater clarity to the apostolic orientation of each Assistancy and Province, to integrate the Social Apostolate, more specifically the Social Centres, in the overall apostolic planning of the Provinces ... These steps will go a long way in ensuring the presence of a new generation of Jesuits and finding collaborative ventures that can ease the understaffed situation and the financial strain.” [February 2, 2005 letter, pp. iii-iv.]

**National Jesuit Strategic Discernment: Decisions and Commitments of the United States Provincials**, U.S. Jesuit Conference, 2008:

The section on Ministries (pp. 24-26) underscores the importance of social-cultural analysis, research, reflection on the “signs of the times,” and the establishment of written agreements regarding mutual commitments and respective responsibilities of provinces, apostolic institutions, and Jesuit communities.

**New Orleans Province of the Society of Jesus**

In light of these directions, the Commission on Ministries of the New Orleans Jesuit Province, working on a multi-year process before the onslaught of Hurricane Katrina, had arrived at the following recommendation to the Provincial for decision in February, 2005: “Establish an **effective vehicle** to stimulate research, analysis, and effective strategies **for improvement in regional social conditions**.” The Commission determined that such a center would be best as a partnership with Loyola University, and the Provincial and the Loyola President entered into negotiation to make this happen. The Commission also developed an initial concept paper for the center which included the need for JSRI from the social realities of the South (long-term and made manifest once more in the wake of Katrina), the teaching of the Church, and the directions of the Society of Jesus; its mission; five primary activities (research and analysis, education, facilitation, advocacy, and immersion experiences); collaboration with Loyola; structure and staffing; location and services at Loyola; connection with other research institutes and Jesuit social centers around the world; and funding. It provided the framework for the subsequent *Memorandum of Understanding* between the parties.

Subsequent to Katrina, by agreement with the Loyola President, the Province engaged in a capital campaign which raised over \$3 million in endowment on the Province books and assisted in raising an additional \$1 million endowment held by Loyola University for the establishment of a center. In the academic year, 2006-07, the Jesuit Province and his Social Ministries Assistant negotiated the framework for such a center—to be known as the Jesuit Social Research Institute, governed by a Memorandum of Understanding dated November 28, 2007—with the Loyola University Provost, three deans, and others appointed by the President. (The Institute had begun under the draft agreement in August, 2007, staffed by three Jesuits and an administrative assistant.) The MOU provided for structure, staffing, initial budget, offices, advisory board, siting within the College of Social Sciences, and other necessary terms. The MOU was renegotiated between the President of Loyola and the subsequent provincial and signed on October 26, 2010.

*B. From the Social Reality*

On the JSRI website the following short explanation is presented of the underlying rationale for the creation of the Institute and the need for its services:

*While planning for the Jesuit Social Research Institute preceded Hurricanes Katrina and Rita and the ensuing floods, the need for the institute became increasingly apparent since this devastation of the Gulf Coast region. The images of children, women, and elderly people, mostly poor and black, left behind in New Orleans in the wake of Hurricane Katrina are indelibly etched on the conscience of our nation. They raise hard questions about how our churches, schools, communities, society, and governments have failed in our moral duty to protect, defend,*

*and uplift our neighbors, the poor in our midst. In their own post-Katrina reflections, the Jesuits of the New Orleans Province realized that they too have failed in some ways to address important social concerns and the need to restore right relations and respond to the unjustly suffering and oppressed in the region. People of color, African Americans and Hispanics, bear disproportionate percentages of persistent and pervasive poverty in the South. Such chronic poverty contributes to higher rates of unemployment, illiteracy, illness, and incarceration among persons of color. JSRI aims to direct its efforts at research, education, and advocacy towards the alleviation of these conditions and their underlying causes.*

### *C. From community agencies*

Another aspect of the need for JSRI is in the experience of those working in Catholic Charities and other local Catholic community efforts for justice and peace who were consulted by the Jesuit Province in several meeting in the process of its planning. They indicated that, in view of the demands on the service-providers and community workers, there was a need to provide a “higher level” of analysis and theological reflection on social realities than was possible for many local groups. Such a center could contribute strongly to respond to that need.

Subsequently, when JSRI began building its database for its educational publications, it initially included from across the South: the Catholic Charities directors; directors of Justice and Peace Offices; directors of racial diversity and human relations; immigration and refugee programs; and Catholic bishops. Over the past seven years that list has been expanded by outreach of the fellows across the region and across the country to 2400 persons. Their level of interest and confidence in the work of JSRI is reflected simply in this fact: analysis of the “openings” of the *E-News* for the month of April, 2014, for example, were as follows: 10.33% of 4,454 students; 28.32% of 913 faculty and staff; and 30.63% of our JSRI list of persons for whom we have email addresses. These rates are fairly typical of the various groups of recipients and are reviewed for each issue.

A former Catholic Charities director, now managing a multi-million dollar social service program as far away as Connecticut wrote on January 6, 2014: “I continue to receive the Just South Quarterly and look forward to the articles. I have quoted from them several times while offering testimony before the CT General Assembly (state legislature).”

### *D. From local Churches*

Local Catholic advocates have a need for the kind of research and advocacy resources that JSRI brings to the struggle for social justice. For example, in January 2009, JSRI fellows met with the Director and Associate Director of the Louisiana Conference of Catholic Bishops, who specifically asked JSRI to assist with research and advocacy work on the following issues: criminal justice, immigration, payday lending, and the death penalty. This has given rise to multi-year JSRI efforts to build coalitions and do the work of advocacy on both the state and federal fronts, especially on payday lending, capital punishment, and immigration.

From Mississippi Catholic Dioceses have come requests for JSRI to work on the issues of immigration, criminal justice reform, and Medicaid expansion. On April 26, 2012, Bishop Joseph N. Latino of the Diocese of Jackson wrote to Fr. Kammer “to personally thank you for your assistance in defeating HB 488, the immigration legislation proposed by the Mississippi

House of Representatives. ... Your support and technical assistance was invaluable. ... I look forward to your continued support.” A few weeks earlier, on April 4, 2012, the Director of Parish Based Ministries for Catholic Charities of Jackson wrote Dr. Weishar, “We are so grateful for all of the assistance, guidance and education we have received from you and Fr Kammer. Without a doubt JSRI has positively impacted the laws and communities of Mississippi.”

#### **IV. RELATIONSHIPS TO OTHER EXISTING INSTITUTES**

##### *A. Service to students, faculty, and other constituents important to Loyola University*

In order not to duplicate material indicated above, the following services are simply listed here:

- Conferences on campus for students, faculty, staff, and friends of Loyola
- The *JustSouth Quarterly*, *JustSouth Monthly* (formerly the *JustSouth E-Newsletter*), JSRI facebook and twitter entries, and the JSRI website resources at [www.loyno.edu/jsri](http://www.loyno.edu/jsri) containing all prior publications since their inauguration five years ago.
- Presentations on race, poverty, and migration and Catholic social thought on campus, to multiple classes, to the Alumni College, and to other local and national groups.
- Presentations off-campus and around the country enhance the reputation of Loyola at other universities, among justice advocates, and among religious groups.

In addition to the items described above, new JSRI on-campus contributions include:

- Inaugurating an experimental grant program—funded by a local foundation—providing four \$2200 social research grants to students for the summer of 2014 to promote social science research targeted at improving the social conditions of New Orleans and Louisiana. A committee of Loyola faculty and staff provided input on the design of the grant program and review of the student proposals in the spring of 2014.

##### *B. Enhances/complements, and collaborates with existing institutes, programs, and curricula*

- During the past five years, JSRI has worked with the Loyola Institute of Ministry on a funded research proposal to assess the need for LIM services in Spanish to the burgeoning immigrant population, in taping video presentations and participating in webinars, and Fr. Kammer has celebrated and preached at the LIM Baccalaureate Mass in 2013 and 2014.
- Dr. Weishar has participated in Service Learning provider meetings organized by Office of Community Engaged Learning, Teaching, and Scholarship, the Human Trafficking Working Group organized by Prof. Laura Murphy, and the Community Engagement Steering Committee organized by Heather Mack.
- Participating regularly in the events of the Loyola Mission and Ministry Office, prompting Fr. Dziak to thank Fr. Kammer on May 7, 2013 for “your willingness to assist on our campus with talks, lectures, advice and professional expertise...”
- JSRI immigration work has been coordinated with the Immigration Clinic of the College of Law and the Gillis Long Poverty Law Center.
- Other programs and offices have co-sponsored JSRI conferences, including: the Center for Latin American and Caribbean Studies, the College of Law, the Center for the Study of New Orleans, the Office of Mission and Ministry, the Department of Political Science, the Department of Sociology, LUCAP, the Black Student Union, the Gillis Long Poverty Law Center, and the Center for International Studies.

In addition, new initiatives include:

- Accepting the invitation of the Loyola Honors Program to take an active partnership role in the Honors Program in AY15, beginning with the Ignatian Colloquium for Honors Freshmen.
- JSRI's agreement in February, 2014 to cooperate with the College of Law in its proposal to make available to students a certificate in immigration and citizenship law.
- Inauguration of an anti-racism initiative, in collaboration with Loyola faculty and students, by sponsoring a full-day workshop by the Pax Christi Anti-Racism Training Group (February 8, 2014), successfully soliciting a small grant, and beginning a planning group to continue this effort.

## **V. ADEQUACY AND APPROPRIATENESS OF RESOURCE UTILIZATION**

### *A. Current human resources and operating expenses*

The JSRI core staff consists of:

- the Director: Fr. Fred Kammer, SJ, JD;
- two fellows: Dr. Alex Mikulich, PhD, and Dr. Susan Weishar, PhD; and
- one full time administrative assistant.

The director and fellows have extraordinary faculty status. JSRI also has two unsalaried "associates," one working on Alabama issues (Fr. Ted Arroyo, SJ, PhD) and the other the Provincial Assistant for Social Ministries (Ms. Mary Baudouin, MSW). The associates participate in monthly staff meetings, advisory board meetings, and staff planning. We also have a work-study student most fall and spring semesters.

In addition, in spring 2014, JSRI received a grant for two years to hire an economic policy specialist to work on economic security issues for poor and vulnerable families in Louisiana and Mississippi. The specialist—Alí Bustamante—began work at JSRI on July 1, 2014.

The final operating figures for AY14 were:

#### ***Income***

Jesuit Province Endowment	\$141,750	
Loyola – Endowment	\$150,000	
WKKellogg Foundation	\$100,000	
Langeloth Foundation	\$51,727	
Keller Foundation	\$11,000	
Stipends	\$11,000	
Gifts	\$23,940	
Grants	\$5,873	
<b><i>Total Revenue</i></b>		<b><i>\$495,290</i></b>

#### ***Expenses***

Personnel budget [Salaries, Fringe, and Consultants]: \$310,416



Non-Personnel	25,392	
Board	9,147	
Projects	22,460	
<b>Total Expenses</b>		<b>\$367,415</b>
<i>AY14 Surplus*</i>		\$ 127,875
<i>Cumulative Surplus*</i>		\$ 191,686

\*The current surplus and cumulative surplus include unexpended foundation funds designated for subsequent years.

In addition, JSRI receives support from Loyola University in terms of space, utilities, custodial, public relations, IT, Institutional Advancement, Human Resources, accounting, legal, work-study student, etc.

#### *B. Library (information resources and staffing)*

JSRI maintains in its conference room a small library of books on race, poverty, migration, and Catholic social thought. We display journals from other Jesuit social centers and other resources. We also maintain on our website all prior editions of the *JustSouth Quarterly* and *JustSouth Monthly*, as well as copies of selected talks and articles by the fellows. Aside from technology support in lectures and presentations and individual research of the fellows there, JSRI does not rely on the Monroe Library for information resources.

#### *C. Information Technology*

Each of the fellows and the administrative assistant has a desktop computer and telephone; JSRI also has a copier, video camera, and other equipment.

#### *D. Other Academic Support Services*

JSRI is located within the College of Social Services. Fellows attend CSS faculty meetings. JSRI has utilized a faculty/staff advisory committee [Dr. John Sebastian, Dr. Phil Frady, Dr. Kathleen Fitzgerald, Prof. Hiroko Kusuda, Dr. Rae Taylor, Dr. Kelly Brotzman, Sr. Liz Willems, and Fr. Ed Vacek.] as well as a small faculty/staff committee to review the proposals for the summer 2014 student research grants. We also had a member of the faculty (Dr. Kathleen Fitzgerald) and a Jesuit faculty member (Mr. Silvester Tan, SJ) as participating observers at our regular Advisory Board meetings.

#### *E. Space Requirements and Classroom Technology*

JSRI offices located in Suite 306 in Mercy Hall consist of five individual offices (director, two fellows, and economic policy specialist), a conference room/library, a storeroom (used by our work-study student as well), and a combination waiting room/receptionist area in which the administrative assistant works. In lecturing to classes on campus, we use whatever technology is available. We use university conference rooms of various sizes for conferences, speakers, board meetings, and committee meetings.

#### *F. Contributions to and Impact on Fundraising*

JSRI director works closely with the CSS institutional advancement officer to identify prospects and, with IA staff, to develop funding proposals (assisted by JSRI fellows and associates). JSRI director has also spoken to the Alumni College and, at the request of IA, to the Washington DC

alumni gathering (December 2013). We are assisted by IA staff in identifying foundations to which we might make inquiries regarding particular projects. The JSRI director also has identified prospects from prior experience and attempted to nurture relationships between them and JSRI.

#### *G. Accreditation Expenses*

JSRI has no accreditation expenses.

### **VI. PLANNING AND ASSESSMENT**

The 2012 JSRI Strategic Plan is the primary document which sets out the sustainability factors which are key for JSRI's mission and work. Included there are sections on key relationships with the "endowment partners" (Loyola University and the Jesuits), mission effectiveness (research, education, and advocacy), communications, and fundraising and development.

A key part of the sustainability vision for JSRI was the development of the partnership between Loyola and the Jesuit Province—initial and revised Memoranda of Understanding, appointment of the Advisory Board (six by the Loyola President, six by the Jesuit Provincial), and, in the revised MOU, the retention of the endowment shares by the respective partner which promotes ongoing interest in, and support for, JSRI by that partner.

#### *A. Assessment Plan That Addresses Sustainability and Use of Results*

Assessment within JSRI is conducted in a variety of ways. Some *events* are assessed using feedback forms with participants. For example, written evaluation forms were distributed to the audience at the Brian Massingale lecture in September, 2012 and at the Trafficking Conference in October, 2012. These are collected by staff, studied by them, and used in planning JSRI activities. One learning from these is a current preference by JSRI staff in favor of single-event speakers as in the case of Fr. Massingale and Sister Prejean rather than more complex multi-event conferences—due to financial and staff-time costs/constraints and number of participants. [An exception in AY13 was the human trafficking conference organized in response to the Superbowl in New Orleans and the interest of other Loyola and civic advocates in participating in the planning.]

Participants at the Catholic Dialogues on Immigration submit written evaluations of the sessions, which are studied by the presenters in planning for the next dialogue.

Progress on our *research projects* is assessed by the Board of Advisors of JSRI, which meets twice a year. *Project proposals* are submitted to the twelve-member board in writing and written *project updates* are presented by the fellows at every board meeting to solicit ongoing board input and advice. The board members also evaluate each of their meetings in writing. The board also reviews a complete financial report at each meeting showing the current year income and expenses in detail with comparative figures going back the AY09.

Participants in the responsible shareholder dialogues with private prison management evaluate the dialogues after each session in person or by conference call. Death penalty and payday coalitions are engaged in ongoing evaluation and action planning as their work progresses.

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

Periodic accountability reporting on the progress of implementing the strategic plan—our overarching sustainability plan—takes place at staff meetings using a “person responsible” and “target dates” written format for the entire plan. Partial or complete reviews of the same worksheet are built into most of the semi-annual meetings of the Advisory Board. The due dates are adjusted at times, new tactics added, and some planned tactics discarded after further experience.

Assessment of our *JustSouth E-newsletter* includes a review at periodic staff meetings 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 statistical reports for the months of January, March, and July, 2013 *E-Newsletters*. Each is divided into four sub-groups: JSRI external list, Loyola faculty, Loyola staff, and Loyola students. See also the mid-semester reports (November and March) from the 2013-14 academic year of the re-formatted *JustSouth Monthly*.

We have also received reports from the web-team through Google on the number of “hits” on our *website* and on various pages. These are attached in the JSRI intranet as “Website Analytics” for the months of December, 2012 and January, February, March, May, and June of 2013. They are reviewed by the JSRI Director upon receipt and shared with staff as appropriate at staff meetings.

*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 interim 2012-13 report was submitted on-line to the Langeloth Foundation in February, 2013 and our interim 2013-14 report in January, 2014 on our private prison human rights project, including an updated “impacts” section in the Langeloth logic model format. These reports are attached on the JSRI Intranet, as well as a brief June, 2014 update report to the foundation.

#### *Financial Sustainability*

The raising of the initial endowment of \$4 million dollars was critical to the vision for financial sustainability of JSRI, since the endowment interest would provide core funding. The vision included the development of other funding sources (grants, stipends, and gifts) as well as foundation and other funding for specific purposes. The details of the growth of these sources can be seen in the following:

## Grant History

\$10,000—ALMAR Foundation (N.O.) [general support/migration work, AY09]  
\$25,000—Carnegie Corporation of New York [two conferences, AY10 and AY11]  
\$5,000—St. Dominic Health Services (Jackson) [general support/publications, AY12]  
\$20,000—Clinton Family Foundation [general support, AY12 and AY13]  
\$25,000—Foundation for Louisiana [payday lending work, AY12]  
\$25,000—Foundation for the Mid-South [general support, AY13]  
\$157,000—Langeloth Foundation (NYC) [prison human rights, AY13-AY15]  
\$11,000—Keller Family Foundation (N.O.) [student summer research grants, AY14]  
\$5,000—US Jesuit Conference (D.C.) [Loyola Anti-Racism Initiative]  
\$200,000—W.K.Kellogg Foundation [Vulnerable Children and Families, AY14-AY16]  
*Total--\$483,000*

## Annual Giving/Individuals

AY09--\$2,000  
AY10--\$8,900  
AY11--\$4,375  
AY12--\$6,010  
AY13--\$26,695  
AY14--\$23,940  
*Total--\$71,920*

## Stipends/Honoraria

AY09--\$6,976  
AY10--\$13,050  
AY11--\$29,375  
AY12--\$20,010  
AY13--\$14,111  
AY14--\$11,000  
*Total--\$94,522*

### *B. External Reviews*

JSRI has no overall external review except for the work of the Advisory Board appointed by the Loyola President and the Jesuit Provincial (and drawn largely from outside Loyola) and those reports required by, and reviews conducted by, various funders, the most comprehensive of which is the prison human rights project funded by the Langeloth Foundation.

### *C. Structure and Process for Administrative Oversight*

As part of the College of Social Sciences, JSRI reports to the CSS Dean. In addition, the JSRI director has provided an annual report to the Loyola President and the Jesuit Provincial. The chair of the JSRI Advisory Board (Dr. Lydia Voigt) is appointed by the Loyola President. In addition, the Social Ministries Assistant reports to the Jesuit Provincial on the work of JSRI. JSRI expenditures are subject to review by the accounting department to insure that funding is available and that expenditures comport with Loyola regulations and meet the requirements of various funders. The JSRI director provides an annual performance appraisal for the fellows and administrative assistant and is in turn evaluated by the CSS Dean.

### *D. Impact on Accreditation or Certification*

JSRI activities strongly contribute to the community engagement aspects of Loyola. One of the primary ways in which JSRI engages the community is through an array of organizational coalitions, some formed and led by JSRI (e.g. LA for Responsible Lending) that include the following organizations:

Payday: LA for Responsible Lending; AARP Of LA; United Way of Southeast Louisiana; Resources Benefiting Families of Fire Ministries; Helen Godfrey Smith (Shreveport Federal Credit Union); Habitat For Humanity St. Tammany West; Louisiana Budget Project; *Puentes* New Orleans; Louisiana Association of Nonprofits; and Louisiana Fair Housing Alliance. Louisiana Conference of Catholic Bishops (LCCB); and LSU School of Social Work have been deeply involved but cannot formally join any coalition. Together Baton Rouge is also an informal partner. Center for Responsible Lending Legislative Director Uriah King assisted in drafting the APR cap legislation.

Death Penalty: we work through two primary coalitions: Louisiana Catholics Committed to Repeal the Death Penalty and Louisiana for Alternatives to the Death Penalty. Key players include: The Louisiana Conference of Catholic Bishops; the New Orleans Jesuit Province; the national Catholic Mobilizing Network; the United States Conference of Catholic Bishops; and the Capital Post-Conviction Project of Louisiana.

Medicaid Expansion: Catholic Charities of New Orleans; the Louisiana Conference of Catholic Bishops; the Life and Justice Committee of the LCCB; the Louisiana Interchurch Conference; Together Baton Rouge; Together Louisiana.

Comprehensive Immigration Reform [and opposing anti-immigrant legislation]: the USCCB Justice for Immigrants Campaign; Catholic Charities Justice and Peace Office; the Archdiocesan Office of Racial Harmony; *Puentes*; The New Orleans Worker Center for Racial Justice (i.e. *Congreso* of Day Laborers; Women United for Justice; and National Guestworker

Alliance); St. Anthony Catholic Church (*Café con Ingles*); Catholic Charities Justice for Immigrants Committee; Interfaith Worker Justice New Orleans; Leadership Conference of Women Religious; NETWORK; *El Pueblo*/Seashore Mission of the Methodist Church; Migration and Refugee Services of the Diocese of Biloxi; Moving Forward Gulf Coast; Steps Coalition of Biloxi; and Catholic Charities of the Diocese of Jackson.

Private Prison Human Rights: Eight U.S. Jesuit Provinces; Two Canadian Jesuit Provinces; United Methodist Church Foundation; Evangelical Lutheran Church; Sisters of Charity of the Blessed Virgin Mary; the U.S. Jesuit Conference; Sisters of Mercy; Dominican Sisters of Hope; Congregation of St. Joseph; Mercy Investment Services; General Board of Pension and Health Benefits of the United Methodist Church; ; Northwest Coalition for Responsible Investment; American Baptist Home Mission Society; Catholic Health East; Congregation of Sisters of Charity of the Incarnate Word; Loyola University Chicago; Missionary Oblates of Mary Immaculate; Midwest Capuchins; Sisters of the Holy Names of Jesus and Mary; and Socially Responsible Investment Coalition.

Overall, JSRI contributes primarily to the following 5 university-wide community engagement objectives:

Loyola University Community Engagement Objectives		
Students	Community	Institution
Students have an introductory familiarity with social justice and can identify injustice. Students are prepared to begin examining the consequences of their own choices on the well-being of others.	Community looks to Loyola to provide effective and useful services to alleviate persistent community needs.	Loyola's community engagement policies and procedures reflect its Jesuit values.
Students have a more sophisticated understanding of social justice; with the ability to identify root causes of injustice and recognize effective methods for preventing and responding to injustice. Students have explored the boundaries of their empowerment in shaping social conditions.	Sustainable campus-community partnerships help build the community's capacity to address injustice and meet its own needs. Increase the pool of community members advocating for a more just world.	Loyola's strategic priorities embody the commitment to community engagement in its mission
Loyola graduates uphold the principles of dignity; equality; and solidarity as they navigate the complex path to a more just world; including an advanced understanding of social justice; and the ability and commitment to contribute to social justice in their personal; professional; and spiritual lives.	Systems affecting, and social norms surrounding, social justice and injustice are improved.	Loyola is a model Jesuit university; having earned distinction as an anchor institution "with and for" the community.

#### *E. Impact on Other Institutes*

See the details of JSRI's work with other institutes set out in section IVB above,

*"Enhances/complements, and collaborates with existing institutes, programs, and curricula."*

## *F. 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: described above, these focus on: payday loans in Louisiana; the death penalty in Louisiana; responding to state anti-immigrant legislation in Louisiana, Mississippi, and Alabama and promotion of comprehensive immigration reform (now stalled in the U.S. House); Medicaid Expansion in Louisiana and Mississippi; and responsible shareholder initiatives 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.

*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. Staff will continue to rely on the Advisory Board to screen new proposals and evaluate and advise on ongoing projects.

*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 and work to increase the recipients by actively soliciting readers at various events, talks, dialogues, and meetings who are interested in our work.

*Key Performance Indicator No. 3:* Staff will publish twelve issues of the *JustSouth Monthly (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. Staff will continue to use the *MyEmma* analytics to assess the interest of the various groups: students, faculty/staff, and JSRI-list. A new sub-list is being developed of Kellogg Foundation grantees in Louisiana and Mississippi.

### 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. 4:* 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. Staff will continue to use our educational vehicles as support for our advocacy projects.

*Key Performance Indicator No. 5:* JSRI staff and associates will work actively with Catholic and other advocates this year to oppose any state anti-immigration initiatives and to promote comprehensive immigration reform.

*Key Performance Indicator No. 6:* JSRI staff will continue advocacy coalition-building in support of legislative initiatives in Louisiana in regard to payday predatory lending and capital punishment.

*Key Performance Indicator No. 7:* JSRI staff and associates will continue advocacy work in support of a responsible investor coalition working to improve human rights in private prison corporations. With the adoption now of policies by both companies, the efforts of the coalition will focus on implementation, training of prison personnel, and eventually reporting to shareholders on an annual basis.

#### ORGANIZATIONAL MISSION AND ADVANCEMENT

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

*Key Performance Indicator No. 8:* 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.

*Key Performance Indicator No. 9:* Staff will implement the W.K.Kellogg Foundation proposal by hiring an Economic Policy Specialist and developing key research vehicles on payday lending, taxes, immigration, in addition to a new social indicators measure for the five Gulf States covering the JSRI core issues of race, poverty, and migration.

*APPENDIX: Accessible in the JSRI Intranet are:*

- [Memorandum of Understanding between Loyola University and Jesuit Province](#) (Amended, 10/26/10)
- [Advisory Board Guidelines](#)
- [Advisory Board Project Proposals](#)
- [Advisory Board Project Updates](#)

- Annual Reports for years AY10 through AY14 and website reports for AY08 and AY09
- [Strategic Plan: Completed and approved March 15-16, 2012](#)
- [Assessment Reports/Plans: 2010-11](#)
- Program Course/Learning Outcomes Matrix (Academic Units Only)
- [Death Penalty in Louisiana-White Paper--March, 2012](#)
- [Detention Conference--October 2011-Evaluation](#)
- [Clinton Family Foundation Grant Report--March 31, 2011](#)
- [Carnegie Report on Grant for October 2010 Conference--March 28, 2011](#)
- [Carnegie Report on Grant for October 2009 Conference--April 5, 2010](#)
- [Compilation of evaluations of seven October 2009 Conference events--April, 2010](#)
- [Conference Evaluation--Race, Poverty, and Election 2012-Massingale--September, 2012](#)
- [Conference Evaluation--Human Trafficking--October, 2012](#)
- [Conference Evaluation--Hyperincarceration Nation--April, 2013](#)
- [Dialogue on Immigration No. 1 evaluations--January, 2012](#)
- [Dialogue on Immigration No. 2 evaluations--March, 2012](#)
- [Dialogue on Immigration No. 3 evaluations--October 2012](#)
- [Dialogue on Immigration No. 4 evaluations-May, 2013](#)
- [Dialogue on Immigration No. 5 evaluations-April, 2014](#)
- [Foundation Report-Langeloth-February, 2013](#)
- [Foundation Report-Langeloth-January, 2014](#)
- [Foundation Report-Langeloth-Summary-June, 2014](#)
- [Foundation for Louisiana Mid-year Report--June, 2012](#)
- [JustSouth E-News Statistical Report-July, 2013](#)
- [JustSouth E-News Statistical Report-March, 2013](#)
- [JustSouth E-News Statistical Report-January, 2013](#)
- [JustSouth E-News Comparative Report--2011-12](#)
- [JustSouth E-News Statistical Report--August, 2012](#)
- [JustSouth Enews comparisons--Feb to August, 2010](#)
- [JustSouth E-news response overview-October 2011 edition](#)
- [JustSouth Monthly comparisons-Mid-Semesters-2013-14](#)
- [JustSouth Quarterly, "Mississippi Rejects Immigration Enforcement Bill"--Summer, 2012](#)
- [Website Analytics--May, 2014](#)
- [Website Analytics--April, 2014](#)
- [Website Analytics--March, 2014](#)
- [Website Analytics--February, 2014](#)
- [Website Analytics--December, 2013](#)
- [Website Analytics--November, 2013](#)
- [Website Analytics--October, 2013](#)
- [Website Analytics--June, 2013](#)
- [Website Analytics--May, 2013](#)
- [Website Analytics--March, 2013](#)
- [Website Analytics--February, 2013](#)
- [Website Analytics--January, 2013](#)
- [Website Analytics--December, 2012](#)

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