**STRATEGIC PLANNING—March 7, 2017 Staff Markup—For Board Feedback**

**Strategic Issue 1: Key Relationships**

*JSRI will deepen and broaden relationships that are key to achieving our mission and will continue to identify and develop new relationships with key constituencies.*

GOAL 1: *JSRI will maintain and expand relationships with Loyola University—students, faculty, and staff, and other areas of campus life while increasing JSRI’s value to the University’s service and academic mission.*

1. To increase collaborative research, education, and advocacy with Loyola faculty and staff where it aligns with JSRI’s mission.
   1. At the beginning of each year, convene all faculty and staff engaged in social justice related activities. (*Fred*)
   2. **Get 3-4 guest authors from among Loyola faculty and staff to write an e-news article *(3 x year—each fellow recruits one; Katie will follow up with authors*).**
   3. Offer guest class lectures or collaborative research with at least one faculty member *(each fellow).*
2. To engage students in JSRI’s issues and increase their involvement in social justice work.
   1. ***Teach a class 1 x year* *(Nik will spearhead but it should be team-taught – aim for Spring 2018)***
      1. **Research current course offerings to determine what is needed.**
      2. **Talk with faculty about where JSRI can make an impact.**
      3. **Develop and propose a class with cross-curricula collaboration.**
   2. Continue with the honors freshmen Ignatian Colloquium *(1 mentor and 1 teacher each cycle*) in the fall semester of each year.
   3. Offer service learning opportunities that incorporate advocacy and organizing
      1. Café Con Ingles (Sue).
      2. Possibly a second opportunity spearheaded by another fellow by year 3, e.g. Cornerstone Builders of Catholic Charities New Orleans.
   4. **Become a faculty advisor to at least 1 student group related to our issues**
      1. Research which organizations would relate to JSRI (*Katie to contact Kurt Bindewald of campus ministry*).
      2. Determine which organizations might need an additional faculty advisor
      3. *At least one fellow will become a faculty advisor by the Fall of 2017*
   5. JSRI will offer a $500 stipend for Honors summer research on one of our topics (*Fred)*.
   6. JSRI will offer a $500 award for Honors Research Paper if on one of our topics (*Fred)*.
3. Increase visibility and involvement on Loyola’s campus.
   1. Sponsor one event per semester: either a film, panel discussion or debate using Oxford rules. (*Responsible fellow and administrative assistant; films chosen at regular staff meetings.*)
   2. Offer advocacy training for students (Spring each year; Fred or staff; Sue in 2017)

GOAL 2: *JSRI will develop and foster more intentional relationships with the UCS Province, Jesuit works, and Jesuits, with an emphasis on those in formation.*

1. Promote Awareness of JSRI’s publications, works, and services with Jesuits and Jesuit works in the UCS Province.
   1. Meet with province communications director to develop a province promotions plan *(Mary w/ Therese Meyerhoff).*
   2. Highlight something about JSRI in *Compassion*, the province social justice news brief, at least 3 x year (*Mary*)
   3. Ask UCS Advancement staff to include JSRI materials in UCS tabling events (*Mary*)
2. More deeply involve novices and Jesuits in formation in the work of JSRI.
   1. Give the annual social justice seminar to 2nd year novices *(Mary and Fred)*
   2. Write up a job description for scholastic summer placement or regency placement *(Mary and Fred by the summer of 2018).*
3. **Provide social analysis training to high schools/Cristo Rey schools.**
   1. **Working on getting training into at least 1 province school each year *(Mary, Fred, and Pete Musso, secondary ed staffer for the province)***
      1. **Develop curriculum flyer (*by the spring of 2018; Katie with staff and Mary).***
      2. **Send a letter to principals of schools in the spring of 2019.**
   2. See Strategic Issue 4, Goal 2, page 9 on staff training in using *Pastoral Circle*.
4. Contribute to UCS province planning in cities and works as appropriate.

Goal 3: *JSRI will work in collaboration with Catholic entities--Bishops, State Catholic Conferences, social service and advocacy leaders, educators and pastoral leaders, and media—to enhance and support their work for social justice.*

1. Providing workshops and training for dioceses, and parishes in a broader geographical area.
   1. Offer to assist in implementation of Archdiocese of New Orleans Synod Plan (*Sue, 2017).*
   2. Reach out to Catholic Charities or diocesan Justice and Peace offices in the region to determine what kinds of training they might find helpful.
   3. Develop a list of trainings that can be offered by fellows (*consult with LIM/Diane by Jen/Katie by June 1, 2017)*.
   4. Assist in development of Justice and Peace work in Mississippi dioceses (*use an associate or associates?).*
2. Publishing articles in Catholic papers and opinion sections of secular newspapers.
   1. *Each fellow* will submit a minimum of one article/letter piece each semester.
   2. Staff to meet by July 31, 2017 with Patricia Murret about pushing out our articles to press/media.
3. Meet with Bishops in our states in order to develop relationships, share research, and invite them/their dioceses into our advocacy efforts. (*Fred*)
   1. Year 1: Alabama
   2. Year 2: Mississippi
   3. Year 3: Texas (select dioceses where associates are working)
4. Providing credible data to State Catholic Conference that can be used for testimony and educating legislators. (No change.)
   1. Mail reports and quarterlies to state Catholic Conference staffs in the Gulf South (*Katie and annually update staff lists)*.
   2. Continue annual meeting with LCCB to respond to particular needs.
   3. Have an annual phone meeting with Florida and Texas Catholic Conferences to determine whether they want to collaborate or have particular issues that need research, etc.
5. **Offer advocacy training and teach-ins to seminaries.**
   1. **Send letter to rectors of seminaries in the region about teach-ins or possible training with the goal of offering 1 session each year in a seminary (*March 2017 letter from Fred to Notre Dame Seminary, New Orleans Rector and Dean about doing an immigration teach-in)***

**Goal 4: [NEW] *JSRI will identify and develop relationships with people and organizations most impacted by racial, economic, and immigrant injustices.***

1. **Each fellow will develop and maintain a relationship with at least 1 grassroots organization whose focus is on one of JSRI’s core issues.** 
   1. Sue will continue to maintain relationship with the Congress of Day Labors and Cornerstone Builders
   2. Nik will develop relationships with Together Baton Rouge and Cornerstone Builders
   3. Ali ? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   4. Fred? **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **Updates on activity with each organization will be given at staff meetings.**

**Goal 5 [NEW]: *JSRI will identify and engage one or two “consultant associates” in states outside Louisiana to enhance its regional work and voice.***

1. **Develop specific expectations and measures of effectiveness such as:**
   1. **Each consultant associate will represent JSRI at regional or statewide coalition meetings and develop written reports on those meetings**
   2. **Each associate will have a specific project and product that they are responsible for (**for example, research on immigrants in Mississippi or high school immersion projects)
   3. **Associates will meet with the full staff in person one time per year, and will submit a written report of activities for that meeting and plan for the upcoming year.**
   4. **Each associate will have an ongoing relationship to one JSRI staffer who will be the person’s primary contact with JSRI.**

**Strategic Issue 2: Research, Analysis, and Education**

*JSRI, working in collaborations where appropriate, will continue to develop action-oriented, faith-informed, innovative research, analysis, education, and advocacy 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, focusing on the issues below. Most research will actually be secondary, i.e. gathering and analyzing already existing research.*

1. Staff will engage in research in race/racism and other topics such as:
   1. **Theories of racism** *(Nik****)***
   2. **Prisons, hyper incarceration, and policing** *(Nik and Sue****)***
   3. **Education Equity (funding, access, curriculum, and discipline)(***Nik)(produce index by 2018)*
2. Staff will engage in research on migration and other topics such as:
   1. State anti-immigrant legislation *(Sue for LA, MS, AL-Demetrius?)(Rafa/Bill for TX?)*
   2. Human rights in private detention centers and prisons *(Sue and Mary)(ongoing data collection)*
   3. Family detention and unaccompanied immigrant children *(Sue and Mary)*
   4. Immigration reform *(Dream Act, DACA, Muslim exclusion, refugee resettlement) (Sue)*
   5. Refugee Resettlement *(Sue)*
   6. **Welcoming Churches and Communities (Sanctuary)** *(Sue and Mary; teach-ins)*
3. Staff will engage in research on poverty and other topics such as:
   1. Social and economic indicators *(Ali’ and Fred)(Index 2017&2018)*
   2. **Safety Net (Health—ACA and Medicaid, Food—including SNAP and School Meals, Housing, Work Requirements)** *(Ali’, Fred)(one-pagers, Food Security in LA report)(Katie)*
   3. Taxes (EITC, tax fairness—States and Federal) *(Ali’ and Fred)(Short papers)*
   4. Wages and benefits *(Ali’ and Fred and 2017 summer intern Brandon Gottschall, SJ)(Reports: State of Working MS 2018; Too Much for Too Many 2017; State of Working Florida*?*)*

D. Staff will engage in research on the intersection of race, poverty, and migration such as:

* 1. Payday *(monitoring)(Nik)*
  2. Death Penalty *(Nik)(monitoring and alerts)*
  3. Racism and migration, particularly non-white *(Sue and Nik)*
  4. **Immigrants on public assistance** *(Sue and Ali’-advocacy-reactive****)***
  5. Income and wealth inequality *(Ali’ and Fred)(Index, quarterly, enews)*
  6. **Environmental Justice** *(Mary, Nik, Fred)(ongoing and reactive)*

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, such as:*

1. JSRI’s own publications and outside print and internet publications.
   1. Continue with quarterly and monthly (ongoing, all staff)
2. Workshops and Presentations
   1. Workshops, including teach-ins and advocacy training (ongoing, all staff)
3. Sponsoring movies, outside speakers, and, where appropriate, conferences.
   1. Movies (once a semester, all staff)
   2. *Question:* Should JSRI link to all first-year students’ movie: get involved in process of selection, co-sponsor, participate in a panel? (*Katie to investigate for fall 2018).*
   3. Question of conferences, to be held rarely, to be decided at staff meetings.
4. Teaching, lectures, and outreach
   1. *See Strategic Issue 1, Goal 1B [page one]on teaching at Loyola*
   2. Class lectures by invitation (ongoing, all staff)
   3. *See Strategic Issue 1, Goals 2B and 2C [page two]on Jesuit novices and Jesuit high school social analysis training*
5. Provision of facts, values and stories about the issues so that constituents are able to relate to the social problems in a more personal. This can be done by:
   1. **Complement experiential learning with social analysis and the theological reflection *(Staff to be trained in using Pastoral Circle and giving talks on wheel of social change* *as needed)*** *See Strategic Issue 4, Goal 2, page 9*
   2. Illumination of dominant cultural narratives that stand in the way of justice (racial justice in particular) (When? How?, Nik)
   3. Traditional and social media.
   4. Use of Teach-In processes *(ongoing, Mary and Sue) See Strategic Issue 4, Goal 1, pages 8-9*

Goal 3: *JSRI will engage in action-oriented, faith informed, innovative ADVOCACY on race, poverty, and migration at the local, state and national level by:*

1. In collaboration with other advocacy groups, annually determining advocacy priorities at the federal, state, and local levels.

1. Presenting advocacy agenda to JSRI board *(once a year at fall board meeting; Fred, Ali’, Nik, Sue)*

* 1. Monitoring proposed legislation.
  2. Offering testimony to legislative bodies.
  3. Making public statements via press or press conferences.
  4. Writing letters to public officials.
  5. Providing administrative commentary when requested to do so and responding to draft regulations when appropriate.
  6. Promoting or undertaking proactive research and legislation.

1. Collaborating with shareholder activity, particularly with private prisons.
2. Ongoing, Mary, Sue, JSRI consultants.
3. Developing and building on relationships and coalitions with other interfaith and civic advocacy groups.
4. Bread or Stones *(Fred and Ali’)*
5. Life and Justice- *(Fred and others)*
6. LIC criminal justice workgroup *(Nik and Sue)*
7. LCCR (LA Coalition for Children’s Rights *(Nik and Sue)*
8. Anti-Defamation League *(Nik)*
9. Equity in All Places *(Nik)*
10. Burning Bush *(Sue)*
11. Mississippi CC (Day at the Capitol) *(Fred)*
12. Alabama Arise (Demetrius Semien)
13. Together BR (*Nik)*
14. Welcoming America Initiative of Catholic Charities N.O. (*Sue)*
15. Louisiana for Prison Alternatives (*Sue, Nik)*
16. Gulf Coast Immigrant Advocates (*Sue)*
17. El Pueblo/Seashore Mission (MS)(*Sue)*
18. **Building an advocacy network using *VoterVoice* through which to inform and mobilize a larger audience [e.g. student training]** *(Ali’, Jen, Katie, Sue, and Fred)*
19. **Ongoing.**
20. **Students and VoterVoice target** (initial training by Sue and Nik in March, 2017 & recruiting; then annually in spring semesters)
21. **Focusing our attention on being more pro-active in advertising VoterVoice at presentations, on the website, the Loyola Alumni magazine, JSRI publications, JVs, ISN, SHC faculty and staff** (using our AL associate), **etc.**
22. **Tactic also includes ongoing number tracking** (Jen and Katie**).**
23. **Advocacy “levels” need to be differentiated for each of the five Gulf South States.**

***[SEE: “A Proposed Way Forward on the States Question”—separate document]***

**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 realties of race, poverty, and migration in the Gulf South in light of the faith that does justice.

1. JSRI identifies and actively collaborates with key strategic partners to accomplish our mission in the Gulf South region.
2. JSRI produces research that informs faith doing justice.
3. Private Prison monitoring (ongoing)*(Sue with student intern)*
4. ***JustSouth Index (annually)(50 states and DC)****(Ali’ and Fred)*
5. ***Too Much for Too Many: What does it cost families to live in Louisiana (2015 and 2017)****(Ali’)*
6. ***The State of Working Mississippi (2016 and 2018)****(Ali’)*
7. ***Food Security in Louisiana)(2017)(possible 2019)*** *(Sakeenah, Ali’, Katie)*
8. ***Educational Equity (2018) five states)****(Nik)*
9. ***(Possible) State of Working Florida (2018)****(Ali’)*
10. **Differentiate for each of 5 states.**

***[SEE: “A Proposed Way Forward on the States Question”—separate document.]***

Goal 2: JSRI will continue and improve its current means of communicating on issues, including the *JustSouth Quarterly* and the *JustSouth Monthly.*

1. *JustSouth Quarterly* will be published on a quarterly basis, and the list of recipients will be expanded regularly and purged.
2. Purge the mailing list (June 1) *(Fred and Katie)*
3. New database possibility (Explore by May 1)*(Katie)*
4. Add Jesuit institution and community libraries/librarians to mailing list (*Fred*)
5. Speak with Laura Kurzu about the future of Loyola Publications Department doing *JustSouth Quarterly* and special reports (by March 1)(*completed 2/21*) *(Fred)*
6. JSRI will continue to publish its *JustSouth Monthly* 12 times yearly.
7. JSRI will maintain and regularly update its website and track hits. *See Goal 4C, below.*

Goal 3

JSRI will identify and nurture key press and media connections. [No change.]

A. JSRI will expand its media outreach by developing relationships with opinion writers and news reporters from radio, television, web-based papers, and print media who take an interest in our issues. *[Schedule meeting with Patricia Murret of Media Relations by June 30.](Fred)*

B. JSRI will enhance relationships with Loyola’s public relations staff and UCS communications staff. [TACTICS: Schedule initial meeting and regular follow-up meetings.]

1. Initial Loyola meeting with Communications VP Laura Kurzu held 2/21/17. *(Fred)*

2. Other Loyola meetings?

3. UCS meetings *(possible meetings in conjunction with N.O. June 2017 ordinations? (Mary, who has already sent request, and Fred)*

Goal 4

JSRI will use new social media strategically as a primary means of increasing “3-way communication (JSRI+ its contact+ people to whom information it might be forwarded by them), including:

1. JSRI will regularly use relevant social media outlets such as Facebook, Twitter, YouTube, and Instagram.
2. JSRI will publish selected talks, events, and narratives on video and audio.
   1. Find out about *Iggy-vision* [*have JSRI staff group invite people involved*].
   2. Start taping talks and post them
   3. Short videos on social media [*find another “Colleen”](Nik to experiment in 2017)*
3. JSRI staff group regularly will review use of social media, consulting others as appropriate. [*Group meets monthly; will report to staff meeting every other month*.]*(Katie and Jen)*

**Goal 5 [NEW]**

**JSRI will develop connections to national and province Jesuit justice endeavors. E.g. JVC, ISN, AJCU, the Jesuit Conference of Canada and the United States, etc.**

* 1. JSRI will identify a contact person on staff/board of each targeted organization:
     1. JVC—Fred on board.
     2. ISN—Fred on board.
     3. AJCU—justice in higher education sub-group (*Fred to join by July 31, 2017*).
     4. Jesuit Conference of Canada and U.S. (*Mary).*
     5. Central and Southern Province (*Mary).*
     6. Jesuit Refugee Service (*Sue to sign up for mailings by May 1, 2017).*
     7. Cristo Rey Schools in Province (*Mary).*
     8. KINO Border Project (*Sue to sign up for mailings by May 1, 2017).*
  2. JSRI should endeavor to participate in regional, national, and international Jesuit justice gatherings.
     1. Inter-American Migration Conference(s) (*Sue and Rafael Garcia)*
     2. AJCU Higher Ed Justice Conference (*Sue to present in Seattle in August, 2017).*
     3. Ignatian Family Teach-In (*Fred there annually; one other staff should present).*
     4. Follow-up to Santo Domingo (*Mary to alert us as to options).*
     5. General Congregation 36 Province follow-up (*as appropriate; Fred*)
     6. JVC mid-America region Reorientation each January (*Fred and Mary).*
     7. Other Jesuit groups as requested (*Fred, Mary, and staff*).
  3. JSRI will engage JV’s and FJV’s in appropriate local activities.
     1. Add to database by June 1, 2017 (*Jen to facilitate).*
     2. Offer to meet and greet FJV group each September.*(Fred)*
     3. Inform both groups of events of interest at Loyola (*Jen and Katie, ongoing).*
  4. JSRI staff and associates will update one another on these relationships (*staff meetings*).

**Strategic Issue 4: Transformational Methods**

*JSRI will research, design, and implement effective methods for transforming hearts and minds for social action and solidarity on JSRI’s issues and make those widely available.*

Goal 1

JSRI will organize and facilitate teach-ins that feature face-to-face encounters between Catholics and poor and marginalized people.

1. **Develop a network of volunteers for the teach-in who are available throughout the Archdiocese of New Orleans to integrate the 9th Synod recommendations on social justice into parishes.**
   1. **Sponsor a facilitator training for a minimum of 10 volunteers (*By Dec 2017, Sue and Mary*)**
   2. **Adapting training materials as needed (*Sue and Mary)***
2. **Develop a teach-in process on at least 2 other issues related to JSRI’s core foci.**
   1. **Hyper-incarceration teach-in (*underway, Sue, Nik, Mary; piloted 3/10/17*)**
   2. **Research faith-based racial dialogue processes, design or adopt process based on research, and test new process at least one time *(2018, Nik)***
3. **Sponsor or organize at least 3 teach-ins per year.**
4. **Make the teach-in methodology and materials more widely available.**
5. **Collaborate with the *Ignatian Campaign for Hospitality* run by the Ignatian Solidarity Network to put current immigration teach-in materials on the web (*Sue and Mary, September 2017)***
6. **Adapt the ISN web model to put teach-in on hyper-incarceration materials on the web. (*Sue and Katie)***
7. **Explore the possibility of getting a grant (Porticus?) for replication of the hyper-incarceration teach in. (*Fred and Sue)***

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. [No change.]

**A. JSRI will review and update current *Pastoral Circle* process and attempt to make it more relevant and engaging. Consider developing the connection to service-learning of students.**

1. **Research and review pastoral circle materials of other groups, and make enhancements to processes Fred and Mary are currently using (*Mary, Fred, Nik)***

**B. Every staff member will be proficient in leading groups in the pastoral circle process.**

1. **Once process is revised, train JSRI staff in using the process (*Fred, Mary)***
2. **Each fellow will observe or assist with facilitation before leading the process solo.**

C. JSRI will advertise staff availability to assist with this process starting with Jesuit works in the UCS province.

1. This will be done through the UCS province social ministry newsletter and the Higher Education and Secondary Education Pastoral Assistants (*Mary)*
2. The new process will be introduced at the UCS Province Reconciliation Gathering in June 2018 (*Mary)*

D. JSRI tentatively will facilitate this process for 3 groups a year.

E. JSRI will consider ways to monetize this activity.

1. Set sliding scale fee for leading pastoral circle process (*Fred & Mary by May 2018)*

Goal 3

JSRI will repurpose its materials and make this literature more readily accessible via publication or social media.

* 1. Make all JSRI materials readily available and centrally located on JSRI’s website.
  2. Conduct a user survey or focus group about JSRI website and print materials, focusing on accessibility, usability, satisfaction, and where improvement is needed. *(Fred)*
  3. Engage the Loyola communications department faculty to a) conduct an evaluation of our print and web materials and b) explore how we might get more people to read our materials. *(Fred)*
  4. Put teach-in and updated pastoral circle process in user friendly and easily accessible formats.
  5. Check on whether or current – and future – process is available for common use, or if it is copyright protected (*Katie)*
  6. Develop a user friendly interactive format for the process *(Katie*)
  7. Consider development of lesson plans, human rights curricula, and short videos.
  8. Formalize the Advocacy Training and put it into a more “available” format (Sue).
  9. Develop at least 5 Digital Advocacy Videos on issues such as the Affordable Care Act, Fear of Islam, etc. (*Nik)*
  10. Release videos on YouTube, Facebook and the JSRI website (Katie, Nik)
  11. Assist in developing a high school curriculum on racism and racial justice for the Archdiocese of New Orleans (*Nik)*
  12. Once the curriculum is developed and released, advertise it’s availability to the UCS Province High Schools and the other provincial social ministry assistants (*Mary)*
  13. Consider ways to monetize this activity.

1. Develop and sell a booklet which puts together the “one-pagers” on Catholic Social Teaching that appear in JustSouth. (*Fred and Katie*)
2. Develop and sell a booklet on the race curriculum (see Goal 3.C.4, above) (*Nik, Katie*)

**Strategic Issue 5: Financial Sustainability and Growth**

*JSRI will develop adequate financial resources to sustain and grow its core staff, increase its endowment, and attract new findings for projects and programs.*

Goal 1

JSRI will increase its grant funding through building development capacity.

1. JSRI will build stronger relationships with LOYNO Institutional Advancement and Grants Office.
   1. Institutional Advancement:
      1. Schedule initial meeting with Chris Wiseman/Karen Anklam by May 1.
      2. Reestablish relationship with Annie in March upon her return from maternity leave.
      3. Work on Kellogg new proposal with Claire Simno in interim. (*Fred)*
   2. Grants Office:
      1. Finish out Kellogg proposal in March, 2017.
      2. Do a “blue sky” session with JSRI staff by May 1.
      3. Determine how IA and Grants office work together.
      4. **Include the JSRI endowment question in conversations. *(Fred)***
2. **JSRI will buy a grant-writer share in the province grants collaborative.**
   1. **If a share is available (we will know by March 31), start in summer, 2017.**
   2. **Determine what the amount will be (is now $15,000).**
   3. **Schedule preliminary meeting with grant-writers by August 31, 2017.**
   4. **Clarify how to have this dovetail with IA and Grants office. (*Fred****)*

Goal 2

**JSRI will develop a direct mail campaign with appropriate and consistent follow-through.**

1. JSRI will collaborate with LOYNO and UCS in developing a direct mail program.
   1. Loyola:
      1. Meet with Chris Wiseman by June 1.
      2. Clarify appropriate database and purchase, if necessary) by August 1, 2017 *(Fred with Katie who will advise by May 1 about initial inquiries).*
      3. Consult with Connie O’Brien by July 1, 2017.
      4. Set up various systems to do first mailing by December 1, 2017.
      5. Coordinate with Loyola fundraising.
   2. Province:
      1. Fred to consult with John Fitzpatrick of UCS by June 1, 2017.
      2. Determine what assistance UCS province can provide to this effort.
      3. Coordinate with UCS fundraising.

**B. JSRI will develop ways to utilize its tenth anniversary [08/17] (and board committee) to nurture its development efforts.**

1. On monthly staff meeting agenda beginning March, 2017.
2. Engage board development committee by June 30.
3. Complete planning by July 31, 2017. (*Fred)*
4. Consider including in plan:
   1. Loyola website “banner” pictures
   2. Press release(s)
   3. “Swag”
   4. 10-year narrative and “learnings”
   5. Event(s) and lecture(s)
   6. “Coffee table book”
   7. Hard bind ten years of *Quarterly* (UCS and Loyola archives)
   8. Sampling of *Monthly*
   9. Timeline display.

C. JSRI will develop and maintain a donor base.

1. Clarify database and fundraising software by July 31.
2. Purge current JSRI list by June 1. (*Coordinate Jesuit listings with UCS*.)
3. Provide for ongoing maintenance.
4. Be more intentional about adding to list (*staff and associates).*

D. JSRI will develop and implement appropriate mailing and acknowledgment strategies (email, mail, etc.)

1. Get “coach” or “consultant” (LOYNO or UCS or 3rd party, e.g. M. Bourg).
2. Implement by December 1, 2017. (*Fred)*

Goal 3

JSRI will explore and employ a variety of ways to expand income-generating activity,

including, but not limited to, the following possibilities.

1. Publicize availability of staff for diocesan, parish, and other talks and workshops.
2. Post clearer info on website by June 1, 2017. *(Fred, Jen, Katie)*
3. Suggested rates: $1000 day for Fred; $500 day for fellows.
4. Add “topics” to staff pages by June 1, 2017 and/or “contact us.”
5. Urge board to promote talks by staff in their locales (by March 31).
6. Develop brochure or handout for use of board and others by March 31 *(Jen/Katie)*
7. Contract for writing and research projects with local and national authors and organizations, e.g., book chapters, journal articles, training manual components, etc. (*Be responsive to requests as they arise, consistent with mission and current activities.)*
8. Study pros and cons of charging for subscriptions for or soliciting sponsors for the *JustSouth Quarterly*.
   1. Consider alternatives such as advertising space or sponsors of *Quarterly.*
   2. Discuss with board development committee by July 1, 2017 (*Fred).*

**Goal 4**

**JSRI will engage its advisory board more actively in developing JSRI financial capacity.**

A. **JSRI will establish a Board Development Committee**.

1. Ask Lee to appoint members of the committee by March 31, 2017.
2. **Have first “meeting” of the committee by June 30, 2017.**

B. Recruit new board members capable of significant giving or getting.

1. Question raised by Lee about staggering terms better.
2. Refresh “potentials” list by March 31, 2017. (*Fred)*
3. Add to list at March 31 board meeting (use form to nominate).
4. Develop vacancy list by March 31, 2017 (*Katie)*
5. Begin “Board Update” Memorandum for each February and July to increase board sense of ongoing participation (*Fred).*

C. Promote an annual giving “event” [e.g. *Giving Tuesday*].

1. Discuss with Board Development Committee by July 1, 2017 (*Fred).*
2. Formalize with full board at fall, 2017 meeting.

D. Committee members solicit Board members.

1. Discuss with Development Committee by July 1, 2017. (*Fred)*
2. Is this solicitation different from the annual giving “event” above?

**Goal 5**

**JSRI will work with Institutional Advancement to promote funding Loyola’s remaining endowment commitment.**

A. JSRI will need the President’s sign-off to do this (*Fred) [DONE 3/13/17]*

B. JSRI will have intentional conversation with Institutional Advancement regarding Loyola’s commitment (*Fred to discuss with Chris Wiseman by May 15, 2017).*

C. JSRI will work with Institutional Advancement (Chris Wiseman and Karen Anklam) regarding potential donors.

1. Meet with IA regarding potential donors by August 1, 2017.
2. Meet with UCS Province regarding potential donors by August 1, 2017.

D. JSRI will work with the Grants Office to identify any possible funders.

1. Identify potential endowment funders by June 30, 2017.

2. Possibly use collaborative grant-writers to focus on endowment funding.

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