

**A HISTORY OF
CATHOLIC CHARITIES OF THE
DIOCESE OF ROCHESTER:
DIRECT SERVICES, ADVOCACY AND PARISH SOCIAL
MINISTRY**

2013 - 2016

**Jack Balinsky
July 2017**

AUTHOR'S NOTE

This work is the seventh installment in my ongoing work to document the history of Catholic Charities of the Diocese of Rochester.

In 2008, in response to an invitation from Catholic Charities USA to submit material in preparation for its 100th anniversary celebration, I wrote a book entitled *Spirit Alive! Consistent Life Ethic Advocacy and Parish Social Ministry in the Diocese of Rochester 1958-2008*. I did so in the belief that these two dimensions of the mission statement for Catholic Charities adopted at the annual national meeting in Miami in 1972 were being increasingly neglected, hoping that this example of our outstanding work in Rochester would stimulate greater national interest.

In 2009, as a gift to the Board and staff of Providence Housing, on the occasion of their fifteenth anniversary, I wrote *A History of Providence Housing Development Corporation 1994-2009*.

For our 100th anniversary of Catholic Charities in 2010, I wrote a comprehensive account of our activities over the previous century entitled *A History of Catholic Charities in the Diocese of Rochester 1910-2010*, now commonly referred to as “the book.”

Recognizing that not everyone interested in the work of Catholic Charities would wade through a 500 page volume, I wrote and distributed at the same time a “Reader’s Digest” version of the history. In March, 2014, in honor of and appreciation for newly installed Most Reverend Bishop Salvatore R. Matano’s support for Catholic Charities, I updated this Reader’s Digest version of our history. This summer I revised it slightly in light of the writing of two further documents I have written over this past year.

The time period 2013-2016 was the time of greatest change in delivery of human services in New York State in my 46 years of association with Catholic Charities. External environmental changes in regulatory requirements and funding presented new challenges and opportunities for the Diocesan Catholic Charities Corporation. A significant impact of the changes was that much more was required of the Diocesan Office of Catholic Charities in order to support the excellent work of its nine divisions and two affiliated corporations. Therefore, in October, I published the sixth volume of the series, “**A Brave New World – Evolution of Rochester Diocesan Catholic Charities Activities 2013-2016,**” focusing on the work of the corporation as a whole.

This seventh volume complements that sixth work by chronicling the direct services, advocacy and parish social ministry activities of our agencies from July 1, 2013 – December 31, 2016.

All seven of these works can be found and downloaded from my website, www.jackbalinsky.org.

Jack Balinsky
Rochester, NY
July 2017

Special thanks to my outstanding Executive Assistant, Ruth Barone, who made possible production of this work.

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A. INTRODUCTION

No one date or event can be seen as a “tipping point” or turning point for an organization as large and complex as Catholic Charities of the Diocese of Rochester. Yet, July 1, 2013 stands out as a day which represents, because of several actual events and symbolically, just such a date. The reasons are many.

The implementation of Executive Order 38 by Governor Cuomo and the establishment of the Justice Center both occurred on July 1, 2013 and the Not-for-Profit Revitalization Act (also signed into law in 2013), were symbolic of significantly enhanced regulatory requirements which would demand significant attention of Board and staff during this time period. While Governor Cuomo’s Medicaid Redesign Team, appointed in 2011, had submitted a major waiver proposal to the Federal government in February 2012, and had initiated new program models such as Health Homes, it was clear by July 2013 that a great majority of our State-funded programs would undergo significant changes, both in terms of service delivery requirements and also billing mechanisms. Further significant changes in our external environment occurred in spring 2016 with the enactment of a significant minimum wage increase in New York State, and the adoption of a Federal Fair Labor Standards Act regulation which would present significant challenges related to classification of exempt/non-exempt employees. Taken all together, these changes would both underscore our strength as a Diocesan Catholic Charities family, but also present many challenges for greater collaboration within our “noble experiment” decentralized system of governance.

Change was also in the air within the Church of Rochester. Bishop Salvatore R. Matano would assume office on January 3, 2014 and would continue the rock solid support which Catholic Charities had enjoyed from the Bishop’s office.

Happily, through continued experienced leadership in the Diocesan office, and several new appointments of regional agency leadership, the organization enjoyed a very strong collaborative staff team during this time period. Jack Balinsky, Tony Barbaro, Barb Poling and Lee Randall continued to anchor Diocesan activities and support regional agencies. Several other appointments on or about this time considerably strengthened the leadership team. They were:

Lori Van Auken, appointed Executive Director of Catholic Charities Community Services – March 18, 2013

Chuck Nocera, appointed Executive Director of Catholic Charities of Chemung/Schuyler Counties – June 1, 2013

Tabitha Brewster, appointed Executive Director of Catholic Charities of Livingston County – July 1, 2013

John McDermott, appointed Executive Director of Providence Housing Development Corporation – July 1, 2013 (replaced by **Mark Greisberger** – March 10, 2015).

Peter Dohr, appointed Executive Director of Catholic Charities of Wayne County – October 1, 2013

Marlene Bessette, appointed President/CEO of Catholic Family Center – January 1, 2014

They joined strong incumbent regional leaders: **Laura Opelt** – Catholic Charities of Steuben (1998), **Ellen Wayne** – Catholic Charities of the Finger Lakes (2007), **Natasha Thompson** – Food Bank of the Southern Tier (2008), **John Quinlivan** – Camp Stella Maris (2008) and **Renee Spear** – Catholic Charities of Tompkins/Tioga Counties (2012).

A companion volume published in October, 2016 detailed the impact of the many challenges and opportunities presented to the corporation as a whole by the external developments described above. It also described the extraordinary support provided by Bishop Salvatore Matano and his Diocesan staff. Following the pattern of previous histories, described here are direct service, advocacy and parish social ministry work of our nine agencies and two affiliated corporations during the time period July 1-2013 – December 31, 2016.

For purposes of economy, I describe here two overall aspects of our work detailed in the October, 2016 document, rather than repeating them in the section devoted to each agency.

First, the October, 2016 work describes in great detail the evolution of Medicaid funding in this three year period. In this volume, those changes are described comprehensively in the section on the work of Catholic Charities Community Services because that has been the agency most significantly affected by the changes. In the sections on other affected agencies, reference is made briefly to these changes for the other agencies who were impacted. It should be noted that through participation in the Home and Community Based Waiver services program and Children’s Health Homes, three agencies (Livingston, Steuben, Tompkins/Tioga) entered for the first time into the “Brave New World” of Medicaid Funding.

The second major over-arching activity relates to the advocacy and parish social ministry elements of the Catholic Charities mission statement. Described in the section of each agency are local efforts fulfilling this portion of the mission. As noted briefly in each section, all agencies also participated in the work of the Diocesan Public Policy Committee as described comprehensively in the October 2016 volume.

The major work of the Public Policy Committee centered around advocacy on State legislative issues. In this three year period, issues were:

2014

Advocacy Issue: Strengthening Families: Maternity and Early Childhood Foundation, Healthy Families, Living Wage Legislation

Education Issue: Care for Creation

Issues of Ongoing Concern: Reject Abortion Expansion, Federal Immigration Reform, NYS Farmworkers Fair Labor Practices Act, Mental Health, War and Non-Violence

2015

Advocacy Issue: Opposition to Abortion Expansion

Education Issues: Care for Creation
Child Poverty

Issues of Ongoing Concern: Education Investment Tax Credit, War and Non-Violence, Federal Immigration Reform, NYS Farmworkers Fair Labor Practices Act and Access to Mental Health Care

2016

Advocacy Issue: Child Care Subsidies,

Education Issue: Opposition to Assisted Suicide Legislation
Care for God's Creation (with an emphasis on Pope Francis' Encyclical *Laudato Si*)

Issues of Ongoing Concern: War and Non-Violence, Federal Immigration Reform, NYS Farmworkers Fair Labor Practices Act and Access to Mental Health Care

B. CATHOLIC FAMILY CENTER

1. Introduction

The three year period beginning July 1, 2013 was a time of significant transformation for Catholic Family Center. Not only were there major changes required in response to evolving external opportunities and threats, as described in a previous work on Diocesan Catholic Charities activities, but there were significant internal staff, structure and program changes. In a previous work were described the significant accomplishments of CFC achieved under the leadership of long-term President/CEO Carolyn Portanova (1989-2011) and the hiring of Mark Wickham as President/CEO effective January 1, 2012. Changing external conditions and challenges still lingering since the acquisition in 2005 of many services previously administered by Family Services of Rochester forced Board and staff to take a hard look at its organization and structure and to make significant cutbacks in administrative and program staff. Having led this transition process, and feeling that he had made major strides in stabilizing the agency, Mark resigned his position effective September 30, 2013. The Board, with Jack's concurrence, appointed Jack Balinsky as Interim President/CEO while a Search Process was conducted, resulting in the appointment of Marlene Bessette as President/CEO effective January 1, 2014. This work details the substantial progress made by the agency since that transition. After suffering significant deficits in 2011 and 2012, the agency essentially broke even in 2013, and enjoyed significant operating surpluses in 2014 and 2015. The pension plan, which had caused such fiscal volatility, was terminated in 2016.

2. Board Leadership

During this crucial transition time, the Board was blessed with two outstanding leaders who served as Chairperson. P.J. Guisto, a partner in the J.C. Jones management consulting firm, brought his organizational development skills to the transition discussions in his term as Board Chairperson from July 1, 2013 to June 30, 2015. He was succeeded by long-time Board member and Chairperson

of the Fund Raising and Marketing Committee, Marty Palumbos, an insurance agent whose commitment to mission and strengthening the organization helped make possible the accomplishments described here.

One of the most important responsibilities of any not-for-profit Board is the selection and support of the President/CEO. In the decentralized Rochester Diocesan Catholic Charities governance structure, the appointment of the President/CEO is the joint responsibility of the Diocesan Director (Jack Balinsky) and the Board. With the resignation of Mark Wickham, P.J. Guisto immediately appointed a Search Committee to work with Jack to appoint a new permanent CEO. Because of significant contributions she had made to the agency already, the Search Committee turned its attention first to the potential candidacy of Marlene Bessette, and after a rigorous due diligence process, unanimously and enthusiastically joined Jack at its December, 2013 Board meeting in appointing Marlene as President/CEO effective January 1, 2014.

A second major Board responsibility is periodically conducting strategic planning processes. Throughout the fall of 2012, the Board and staff had conducted what might be called a “crisis management” strategic planning effort to address the structural deficit the agency faced. With the appointment of Marlene, and her considerable organizational development skills honed by her twenty-eight year career at Xerox, a first order of business was initiating a comprehensive strategic planning process. This exercise included both a “top down” approach addressing external realities and also a “bottoms up” approach with a thorough review of each and every program from the perspectives of need, quality, financial performance and risk. The Board was heavily involved in development of the plan, including a thorough review of major directions at its Board Enrichment session held on September 29, 2014 and unanimously voting for final approval at the January, 2015 Board meeting.

Major strategic intents in the plan were:

Mission	Strategic Intent
<p>Catholic Family Center (“CFC”) partners with people – especially the vulnerable and those facing poverty – to help them achieve their full human potential. A division of Catholic Charities of the Diocese of Rochester, CFC offers compassionate and comprehensive services to families and individuals in need across all stages of life.</p>	<p>Partner with our funders to drive systemic change, in addition to providing exemplary, cost-effective services.</p> <p>Foster a culture of stability, respect and trust that promotes continuous development and personal health while supporting our employees to thrive personally and professionally.</p> <p>Provide clients with a comprehensive set of evidence-based services that equip them to identify and attain personal goals leading to realization of their full human potential.</p> <p>Turn our stakeholders into agency champions, who feel connected to and are driven to participate in supporting our mission.</p> <p>Be a vibrant and thriving social services agency that is a successful advocate for social change whose superior results make it the agency of choice.</p> <p>We carry out this intent in cooperation with the Catholic Charities.</p>

In fall 2015, leadership staff began an intensive process of “refreshing” the Strategic Plan.

A third major not-for-profit Board responsibility is philanthropic fund-raising. During this three year period, the Board continued to organize and promote its two major initiatives, developed and enhanced over many years: the Annual Gala and the Golf Tournament. While many Board and staff members were involved in planning these events, new energy was given to both by Board members Father Mike Bausch and Laurie Sagona for the Gala and Toshiba Executive John McBride for the golf tournament. The gala committee decided to bring new approaches to this annual event. While the format of the 2014 event continued the St. Patrick’s Day tradition and the honoree was Dr. Donald Bain, President of St. John Fisher, different approaches were tried in 2015 and 2016, both honoring internal Catholic Family Center contributors. The 2015 event was held in April with an Italian theme in honor of recently installed Bishop Salvatore R. Matano, and honoring long-time CFC volunteers – Tom Huber for his extraordinary support of CFC for 25 years, including several years running the golf tournament, and Terry Klee, especially for his contributions as chef for the Empty Bowl event. In February 2016 with a Mardi Gras theme, honorees were Father Mike Bausch and Carolyn Portanova. With John McBride’s leadership, the golf tournament, held each of the three years in August at Irondequoit Country Club, annually produced increased revenue.

Results from these efforts in this time period were:

2013	\$731,231
2014	\$755,113
2015	\$810,123
2016	\$945,861

As this time period came to a close, the Board turned attention to another extremely important element of fund-raising – developing a major gifts program. While there had been discussion of this initiative since 2015, it was in summer 2016 that a consultant was hired to help the Board develop a plan. Concomitantly, the Board appointed a Centennial Committee to plan ways for the agency to celebrate its 100th anniversary in 2017, which would also provide additional fund-raising opportunities.

3. Staff Leadership

The key to the transformation of Catholic Family Center in this three year period has been Marlene Bessette. Prior to her involvement with Catholic Family Center, Marlene had worked for Xerox for twenty-eight years, including a number of very high level assignments. A number of years ago, she and her husband, Eric, a high level General Motors employee were parishioners at the Church of the Transfiguration and had begun to discern how they could utilize their considerable talents to more fully live out their faith. Eric became a permanent deacon, now assigned at Transfiguration. Marlene enrolled in a Masters’ Degree in Theology program at St. Bernard’s School of Theology and Ministry. (She achieved her degree in May, 2016.) Together, they became involved with a family in need of a better housing situation, and became aware of

the lack of safe affordable housing in Rochester. Marlene determined that she wanted to explore further systemic solutions to the housing problem. After meeting Carolyn Portanova at the annual golf tournament, Marlene was invited to meet with the senior staff at CFC to discuss community housing needs. The result was that she applied for and was accepted for a nine-month paid “social service leave” from Xerox (one of only eleven people chosen for this program across the United States.) She began her leave April 1, 2012, working in the housing arena. When the Board decided as the “crisis management” strategic planning effort was evolving that an outside consultant would be helpful, given her background, Marlene assisted in the interview process. It became quickly apparent that, with both her background and knowledge of Catholic Family Center, this was a role ideally suited for Marlene. Throughout the fall of 2012, she assisted the Board and Mark Wickham in comprehensively addressing the agency’s fiscal issues. A “turning point” moment in her life and the history of Catholic Family Center came in December, 2012 when she decided not to return to Xerox (where several positions were open to her) but rather to accept the position of Chief Operating Officer of Catholic Family Center.

In this position, for the first nine months of 2013, she continued to improve internal operations at the agency. Jack Balinsky relied upon her heavily during his three months as Interim President/CEO. So, as described above, it was natural that she be appointed to the permanent position beginning in 2014.

Like any effective leader, Marlene’s first priority was to assemble around her an effective senior leadership team. She was able to attract a number of highly qualified recently retired or nearing retirement business executives to the Catholic Family Center. Ron Rizzo, Deacon Don Eggleston and Dave Plankenhorn in particular were helpful in quality improvement and data management. With some job realignment, she included in her leadership group Kathy Johnson as CFO (replacing John Pennell who had served in this role from 2008 – October 2012), Sally Partner, Lisa Lewis, Lindsay Gozzi-Theobald, Cathy Saresky, Jim Morris and Kristie Elias.

At the end of this time period, the Senior Leadership Team included:

Marlene Bessette	President and CEO
Kathy Johnson	CFO
Sally Partner	Vice President of Mission Advancement
Lisa Lewis	Vice President of Crisis & Stabilization
Cathy Saresky	Vice President of Restart Operations
Kristie Elias	Associate Vice President of Mental Health
Jim Morris	Associate Vice President of Family Services
Lindsay Gozzi-Theobald	Chief Quality & Compliance Officer
William Cherry	Vice President of Human Resources

From September, 2014 through the end of this time period, outstanding administrative support was provided by Marlene’s Executive Assistant Ruth Barone (who also continued to serve as Jack’s Executive Assistant.)

4. Direct Services

a. Introduction

This three year period was a time of vibrant activity in the evolution of direct service provision at Catholic Family Center. Described here are:

- 2013 Service Highlights
- 2014 Service Highlights
- Behavioral Health Services
- Housing and Crisis Management Services
- Anti-Poverty Initiative
- 2015 Service Highlights
- 2016 Service Highlights
- Other Program Developments

b. 2013 Service Highlights

Catholic Family Center provided direct services to 33,878 people in 2013, with two-thirds of those having annual family incomes at or below \$15,000. Thirty percent lived in one of the top five most impoverished zip codes, which have an average poverty rate of 46%.

- Aging and Adult’s Expanded In-Home Services to the Elderly Program (EISEP) added administration of the in-home agency services provided to clients. This allows EISEP care managers to seamlessly tailor services to the individual needs of each frail elder that they serve elongating the time they can live independently in their own homes.
- Children Youth and Family’s Unaccompanied Refugee Minor (URM) program graduated eight seniors from high school with six accepted to college and one heading to the Air Force.
- Children Youth and Family’s Adoption Services placed eight older special needs children, two domestic infants and two international children with permanent families and completed Hague recertification – a requirement for international adoptions.
- Healthy Sisters Soup and Bean Works received a grant from the Women’s Foundation of the Genesee Valley that allowed them to offer a workshop series on financial literacy and job readiness to their clients as they prepare to enter the workforce.
- Housing Services moved 52% of the over 1,700 women and children from emergency shelter into permanent housing – the highest rate in 5 years.
- The Mental Health Clinic began walk-in hours in April. This procedural improvement eliminated the long waitlists of the past and allowed the agency to more quickly serve those struggling with mental health issues. This enhanced client service was also a key factor enabling a substantial decrease in the clinic’s deficit.
- Refugee, Immigration and Language Services applied for and received additional funding from the U.S. Conference of Catholic Bishops to create specialized services for two vulnerable

populations-young adult refugees (18-26 years) who arrive alone, and refugees with mental health issues.

- Restart Outpatient expanded its outreach and engagement efforts, and realized significant increase in both the Clinic and Day Rehab programs. Over 90% of Restart Outpatient clients reported improved family relationships and no further arrests as a result of involvement in treatment.
- Four drug-free babies were born to women in residence in a Restart Residential program. Five pregnant women received services in 2013.

c. 2014 Service Highlights

Information in the Catholic Family Center 2014 Annual Report provides an excellent overview of services provided in the middle of this time period as follows:

Housing Services

- Housing Services' Community Resource Services (CRS) served 6,757 individuals in 2014. Seventy-eight percent lived in one of the top-10 most impoverished ZIP code areas in the City of Rochester; 47% live in one of the top-5 most impoverished ZIP code areas.
- CRS received approximately \$88,000 through the Bishop's Appeal for assistance with utilities. The funds provided assistance to 173 households, serving a total of 409 individuals. 71% (122) of these families sought assistance with utility shut-off notices.
- One-hundred percent of the 27 clients housed at Son House remained in permanent housing for six months to one year.

Mental Health Clinic

- In 2014 the Mental Health Clinic served 3,092 clients: 2,874 adults and 218 children.
- The clinic transitioned to a new Electronic Medical Record software that supports e-prescribing. This will allow for better integrated care with Restart Outpatient and Residential Services, and for paperless records which support better communication within the department.
- Client sessions attended increased to 12,895, up from 10,778 in 2013.

Aging and Adult Services

- 94% of our Adult Guardianship Services clients achieved housing stability during 2014.
- 91% of the frail older participants in the Expanded In-home Services for the Elderly Program (EISEP) maintained or improved in at least one of five functional areas (social, economic, physical, mental health, activities of daily living).

- 87% of STAR clients reported improving or maintaining their ability to live independently as a result of their services from STAR.

Children, Youth & Family Services

- Unaccompanied Refugee Minors (URM) Program: Nine youth graduated from high school, seven went on to college, one to a vocational program and one was reunified with family out of state.
- Adoption placed 8 Older Special Needs Children from various states, with only one disruption in placement.
- Parents and Children Together-General Preventive (PACT Program) served 154 families including 405 children. 94% of families maintained their children at home without foster care.

Healthy Sisters’ Soup and Bean Works

- Healthy Sisters’ completed 18 years of service to women in recovery, and in 2014 served 44 women - 72% of whom successfully graduated into employment, education or training programs. Their ages spanned 21 to 56 years, and their duration in the program ranged from one month to one year.

d. Behavioral Health Services

As described in the author’s October, 2016 volume “A Brave New World: The Evolution of Diocesan Catholic Charities Activities 2013-2016,” changes in Medicaid funding patterns had a major impact on the evolution of behavioral health services at Catholic Family Center in this time period, but there were other major changes as well. Foundational to the evolution of these programs was the installation in fall 2013 of the TenEleven Electronic Health Records software, beginning with the Mental Health Clinic in August, and then for Restart Outpatient and Restart Residential toward the end of the year. Installation of this software has made the transition to Medicaid Managed Care much easier.

Described here are highlights of the evolution of the two major behavioral health service areas for this time period.

The Mental Health Clinic, one of only two such outpatient clinics in the Rochester area, was acquired from Family Services of Rochester in 2005. As recounted in a previous history, from the moment of its acquisition, the program faced severe financial difficulties. At the beginning of this time period, there had been significant Board discussion, especially in the 2012 major review of services, about closing the program, but reluctance to do so because of the critical need for this program to the community and the scarcity of other alternatives. The decision was made to close the related PROS program, but efforts to improve the Mental Health Clinic’s finances and service delivery were enhanced.

Beginning in the fall of 2013, led by then COO Marlene Bessette, Sally Partner and Clinic Director Kristie Elias, several changes were made in the program. Some of them resulted from learnings gained in a visit to the clinic operated by Buffalo Catholic Charities and a grant enabling consulting services from MTM. One of the most significant changes was to establish a walk-in service which significantly enhanced staff productivity. The financial situation was also improved when two clinicians returned from family and medical leave. The installation of the Electronic Health Records software enhanced billing effectiveness, and clinician productivity also improved through closer supervision of clinical staff.

Slow progress continued in 2014, but the clinic received a major boost in April 2015, when the agency was awarded a \$1.5 million grant from the Vital Access Provider Program, funded by both the State and Federal governments via Medicaid waiver application. The purposes of the grant were threefold: the opening of a satellite clinic at 1645 St. Paul Street in an underserved neighborhood, the hiring of an engagement specialist to improve client show rate (rate of keeping scheduled appointments), and the hiring of a billing denial specialist to improve the results of the billing processes.

Through the continuing excellent leadership of Kristie Elias, the clinic achieved a milestone in December, 2015, when it was issued a license renewal for a three year period, the longest possible time period. This was a sign of the confidence of the NYS Office of Mental Health resulting from an excellent site visit of the program. At this writing, the program continues to be expanding and improving.

This time period continued also to be a time of evolution in the Restart Program, ably led throughout this time period by long-tenured CFC veteran Cathy Saresky.

The most important development in this time period was the reintegration in spring 2014 of Restart Residential Services and Restart Outpatient Services under Cathy's leadership. The Restart program had been initiated in the early 1980's as an integrated program but for a variety of reasons, several years earlier had been separated into two different administrative units, with the Residential Programs overseen by the Housing Department. The reintegration brought both better quality management under the appropriate area of expertise and delivered administrative efficiency.

The second significant development was finalization of plans to relocate the Restart Outpatient program. For nearly fifteen years, Catholic Family Center had owned the building at 79 North Clinton Avenue, next to its main office. Over the years, a variety of proposals for its use had been unsuccessfully put forward. In 2011, a proposal had been submitted to OASAS for a \$7.9 million grant to renovate the facility for relocation of

the Restart Outpatient program. Marlene and Jack were able to secure final approval for the grant through a meeting with the Governor's office in October, 2013. Renovation began in August, 2015, and the facility will be occupied in 2017 by Restart Outpatient which will relocate from its long-time location at 55 Troup Street.

Several other major events occurred in the Restart Program during this time period:

- Great focus was given to the Freedom House residential program. The program had been operated successfully for many years at the rectory of St. Andrew's Church on the city's northside. From the moment the property was sold after the Church was closed, there had been problems with the new landlord. Things came to a head in late 2014 when the boiler failed, and the landlord was unwilling to pay for its replacement. Nimble agency leadership under Marlene's direction found a crisis solution as the program was temporarily relocated to Immaculate Conception parish. Meanwhile, there had been long ongoing discussion with OASAS about creating a permanent location at a building owned by Passero Associates on Liberty Pole Way. These discussions brought much frustration but no positive results. With much appreciated assistance from long-time agency supporter and Outpatient landlord Jim Philippone, (security measures such as alarmed doors, cameras and a dedicated staircase were quickly installed), the program was moved to 55 Troup Street where it remains today.
- In fall 2015, following on the success of its initiation at the Mental Health program, the Outpatient program also initiated a walk-in program, significantly improving efficiency of staff time utilization, as well as meeting an important community need.
- Throughout this time period, as documented in the aforementioned October 2016 volume, program leadership worked with the Justice Center on several reported incidents.
- With growing frequency, especially in 2015 and 2016, the program was significantly affected by the growing national, statewide and community-wide heroin and opioid epidemic. After experiencing five incidents of overdose by clients, including one heroin overdose death in winter, 2016, the agency developed a comprehensive staff training program on preventive measures, recognizing potential overdose situations and use of Narcon in clear overdose situations. Once again, in this crisis situation, the program rose to the occasion as a valuable program of Catholic Family center and important resource in the community.
- The implementation of Medicaid managed care beginning July 1, 2016 was made easier because the agency had been using TenEleven electronic health records for the Mental Health clinic.
- Finally with regard to Behavioral Health Services, two other Medicaid reform initiatives need mention. The agency began to provide Health Home care management services, but for a variety

of reasons, on only a limited basis. With regard to the Home and Community Based Services program, CFC was an approved provider but decided to go on “hiatus” status until 2017 except for the peer counselling services.

- Application for 820 licensure to become a Residential Redesign provider of stabilization and rehabilitation services was made in September with full approval received in December for a January 1, 2017 start date. This programming is the next evolution of intensive residential services including significant hiring of medical staff and will be implemented at all 3 intensive residential sites: Freedom House, Liberty Manor and Hannick Hall.

e. Housing and Crisis Management Services

As the issue of homelessness became a much more recognized community problem, Catholic Family Center was once again in the forefront of responding to this need. Over the years, Catholic Family Center had developed and was continuing to operate three shelters: Francis Center for men and Sanctuary House and Women’s place for women and children. Under the able leadership of Lisa Lewis, these programs continued throughout this time period. Major events in this program from 2013-2016 included:

- The opening in fall 2013 of Son House, a 21-bed facility next to Francis Center, for persons with mental illness and other disabilities, developed by Providence Housing, with services provided by Catholic Family Center. Service provision was enhanced in 2016 by receipt of a grant from OTADA which Providence staff was instrumental in obtaining.
- Catholic Family Center was also instrumental in responding to the needs of the most marginalized homeless population who for a variety of reasons were unwilling or unable to participate in the extensive county-funded homeless shelter network. Through its existing shelters, for example, in 2015, Catholic Family Center provided 2,340 nights of “hospitality” shelter to persons who were sanctioned from receiving county funding. Catholic Family Center was also a leader in responding to the crisis situation when the city closed to the homeless a downtown garage which had been a place of refuge for this population. After Sanctuary Village, a make-shift tent city set up under the ramp bridge to 490, was closed, an alternate facility was found for the winter of 2014-2015. Marlene and John Paul Perez assisted Deacon Dan Callan in making the rectory at Corpus Christi parish an alternative for this population in the winter of 2015-2016.
- Throughout this time period, the need for physical improvements at Sanctuary House was being addressed. A Homeless Housing Assistance (HHAP) Grant application submitted in 2015 was not funded. With feedback from HHAP, an architect was brought in and the application was revamped and resubmitted. CFC was informed December 7, 2016 that the application was approved

and a \$1.6M grant to fully renovate Sanctuary House was received.

- A final major development during this time period was a change in mission focus at Women’s Place. Necessitated by changing regulatory requirements requiring significantly more staff, the program focus has changed from women and children only and now welcomes families. The name was then changed to Place of Hope.

f. Rochester/Monroe Anti- Poverty Initiative (RMAPI)

In fall 2014, Assemblyman Joe Morelle, following up on initial discussion between the United Way of Greater Rochester and the Governor’s office, brought together a large group of civic leaders and service providers, led by the United Way, the City and County to begin to address in a comprehensive fashion, with promises of support from the State, the much discussed problem of poverty in Rochester. Thus was born the Rochester Monroe Anti-Poverty Initiative (RMAPI).

As planning progressed, and with the establishment of a parallel State task force, comprised of leaders of 18 different State agencies, it became apparent that there was needed a comprehensive, focused, inclusive planning process. It quickly became clear that Marlene, with her Xerox planning background, was an excellent candidate to be one of the leaders of this process and she accepted the role of co-chair (with Kelly Reed, the Monroe County Commissioner of the Department of Human Services) of the RMAPI Systems Design Team. With extraordinary assistance from Ron Rizzo who she had recruited to CFC staff from Xerox, she spent most of the first six months of 2015 leading this effort on a volunteer basis. (For this work, and her leadership at CFC, she was named in October 2015 as the Rochester Business Journal and United Way of Greater Rochester’s Non-Profit Executive of the Year.)

The report issued by RMAPI in fall 2015 developed from this process recommended three priorities: much stronger integration and collaboration of human services and social supports for those in poverty, an adult mentoring initiative, and a focus on early childhood initiatives. The first concrete initiative proposed related to adult mentoring. In summer 2016, CFC was selected as the lead agency for the Mentors for Success pilot project. The focus of this program is to support 300 individuals/families in the Marketview Heights/Beechwood/EMMA neighborhoods to address barriers to employment and to help participants move to self-sufficiency over time. Partnerships have been established with Action for a Better Community (ABC) and The Community Place of Greater Rochester to deliver the professional mentoring. CFC was also awarded a Jameel Poverty Action Lab grant to monitor and evaluate the success of the pilot program. In this work, CFC will partner with the Notre Dame Lab for Economic Opportunity as the primary evaluator. Most significantly, through the leadership of Danny Wegman, \$1.5 million in private philanthropy has been pledged to match funding from

the Upstate Revitalization Initiative of New York State for this \$3 million program over two years.

g. 2015 Service Highlights

In total in 2015, the agency procured new services totaling \$3.5 million over several years. They included:

- The Children, Youth and Families Department received a 5 year grant of \$102,980 per year from the NYS Office of the Children and Families (OCFS) to provide programming and care management for kinship families, to be operated in conjunction with the Kinship Navigator program.
- The Children, Youth and Families Department also received \$142,500 in funding from OCFS for “Roots of Permanency”, a program to support families post-adoption.
- The \$1.5 million VAP grant to the Mental Health clinic has been described previously.
- The Refugee, Immigration and Language Services (RILS) Department is the lead agency in State funding for the Rochester Workforce Consortium for a wage subsidy program, providing \$200,000 per year for the next 5 years, in partnership with others, to support successful employment of traditionally hard to place persons.
- RILS also received a \$250,000 grant from the Federal U.S. Citizenship and Immigration Services to bolster CFC’s immigration volunteer recruitment and training, and to increase outreach with a goal of increasing naturalization (citizenship).
- The Housing Services Department received \$90,341 in funding from the City of Rochester to coordinate client access to permanent housing.
- The Aging and Adult Services Department received funding through NY Connects to expand services to provide information, referrals and options counseling to refugee and immigrant services.

h. 2016 Service Highlights

Statistics are available by department both for persons who received direct services and extended services, primarily educational and referrals in the Kinship program:

<u>Department</u>	<u>Direct Services</u>	<u>Extended Services</u>	<u>Total</u>
Aging & Adult Services	1,661	1,956	\$3,627
Elder Services	1,264	0	1,264
FLAGS	1,394	0	1,394

<u>Department</u>	<u>Direct Services</u>	<u>Extended Services</u>	<u>Total</u>
Housing & Homeless Services	7,144	36	7,180
Kinship Navigator	1,911	46,618	48,529
Mental Health Services	2,172	0	2,172
Children, Youth & Family Services	2,926	12	2,938
Refugee, Immigration & Employment Services	1,412	0	1,412
Restart Outpatient	1,926	0	1,926
Restart Residential	1,297	0	1,297
Total	23,106	48,632	71,738

i. Other Program Developments

Beyond these major accomplishments, there were several other significant program developments during this time period:

- In the fall of 2014, as a result of the Strategic Planning process, it was decided not to apply for a three year renewal of the Re-entry program, because funding was cut to the point where it would be impossible to provide a quality program without substantial infusion of agency discretionary funds.
- In fall 2014, recognizing the subtle shift in the mission statement to focus on lifting persons out of poverty, a Task Force was established to plan a pilot mentoring project at Carlson Commons managed by Providence Housing. This initiative was replaced by the RMAPI initiative and funding of the adult mentoring project described above.
- Throughout this time period, CFC continued to make a significant contribution to the community by resettling an average of 750 refugees per year, with a spike in 2016 of over 900 refugees settled. Saint’s Place continued to provide significant support to resettled families. In 2016, at the request of USCCB, CFC subcontracted with Catholic Charities of Tompkins/Tioga Counties to resettle 50 individuals in Ithaca.
- In 2015, CFC partnered with CCSI to establish a 211 service hotline in Monroe County for coordinated access to homeless shelter placements and case management support to other shelters (e.g. Open Door Mission, Salvation Army, etc.).

- In 2016, CFC received a \$1.4 million SAMSHA grant for the integration of primary care and behavioral health care (over 3 years). The purpose is to create a seamless and stable network of behavioral health treatment, primary health care, and wellness promotion services that will improve health outcomes for individuals with severe mental illness who may also have co-occurring substance abuse disorders.
- At the end of 2016 CFC was selected and received funding to be one of eight local organizations to implement trauma-informed practices throughout the agency in both program and administrative departments. The agency was working with consultants to implement the “Creating Cultures of Trauma-Informed Care,” building upon activities already undertaken by individual departments.
- As part of the agency’s renewed focus on addressing the root causes of poverty, in August 2016, Community Resource Services (CRS) implemented a new assessment tool for case management. Through this more comprehensive assessment, CRS will be able to identify a smaller subset of clients who can be assisted in such areas as job training and financial management which will facilitate movement to self-sufficiency. CRS will also continue to provide emergency services, but hopefully in a fashion focused to the needs of each client.

5. **Advocacy and Parish Social Ministry**

In this time, advocacy and parish social ministry activities were ably led by Dr. Marvin Mich, who had been with the agency since 2000, and Ruth Marchetti, who was hired part-time as Parish Social Ministry Coordinator in the summer of 2012. Able assistance was provided by a Board committee renamed the Advocacy and Parish Social Ministry Committee in 2014. Under the leadership of Chairpersons Rebecca Leclair and Joe Carello, the committee advised staff on the activities described below, helped with parish connectins and annually made decisions about the allocation of Catholic Campaign for Human Development Funds, Rice Bowl Funds and Christmas Appeal funds.

Support for **Diocesan Public Policy Committee** activities occurred in many different ways.

- Marv served as a member of the committee and chaired the Children and Families in Poverty subcommittee.
- Marv and Ruth participated in the committee’s annual events including the Bishop’s Legislative Luncheon and individual visits with legislators during the summer.
- They led the annual Public Policy Committee February petition effort, achieving 4,000-5,000 signatures from Monroe County. Petition issues were: in 2014, measures to support working families; in 2015, opposition to the abortion expansion component in the Governor’s Women’s Equality Act; and in 2016, support for a significant increase in child care subsidies.

- As needed and appropriate, they spoke at gatherings or contributed information at meetings about the many other issues addressed by the committee, including Global Climate Change, and its relationship to the Papal Encyclical *Laudato Si*, opposition to assisted suicide and access to mental health care.
- Ruth served as liaison to the Justice for Immigrants campaign, a broad based coalition established by the United States Catholic Conference of Bishops.
- In 2015 and 2016, Marv worked closely with the Diocesan Presbyterial Council to foster advocacy for children and families in poverty.

Throughout this time period Marv fostered the creation and growth of **Rochester ACTS**, a faith-based community organization comprised of twelve faith committees whose values are consistent with Catholic Social Teaching. In 2014, the group received a national Catholic Campaign for Human Development Grant, which was renewed in 2015 and 2016. After conducting listening sessions, the group established three task forces to address priority community problems: support for working parents, criminal justice issues, and education issues. In each fall, Rochester ACTS joined with other advocacy groups in advocating for increased funding for child care both from the State and County. The group supported a Poverty Summit held on November 15, 2015 to bring this pressing concern to a broader segment of the faith community. Rochester ACTS continues to be a vibrant force in raising up important community issues from a faith perspective.

During this time period, Ruth continued her consistent, effective approach of regular **communication** with parishes. She continued to publish her weekly *Salt and Light* newsletter as well as to convene semi-annual meetings of social ministry representatives. Her own newsletter was supplemented by regular distribution of the *Justice, Peace and Life* newsletter published monthly by the Diocesan Justice and Peace staff under the leadership of Laurie Konwinski from Catholic Charities of Tompkins/Tioga Counties. Communication was also enhanced by the annual Diocesan-wide Parish Social Ministry convening, in whose organization Marv and Ruth played a major role. Two follow-up events were held in the wake of these convenings. As follow-up to the 2014 event, there was a gathering in late 2014 at the Cathedral for Parish Social Ministry Chairpersons from throughout the Diocese. As follow-up to the 2015 event, there was established a Monroe County based group of parish representatives exploring ways in which parishes could “go green”.

The many **presentations and programs** Ruth and Marv presented are too numerous to mention. Illustrative of this work are a few examples:

- Ruth’s work in organizing a number of Just Neighbors initiatives.
- Ruth’s 2014 Lenten series at Peace of Christ parish.
- Marv’s presentation in 2014 at Kathy Dubel’s annual June Social Ministry gathering in the Southern Tier.
- Marv’s fall 2014 presentation to Catholic Family Center staff on Catholic Social Teaching and end-of-life issues.

- Marv’s promotion in early 2015 of two Catholic documents on poverty and work, *A Place at the Table* (2006) and *Vocation* (2012).
- Marv’s leadership in 2016 in fostering development of a local coalition on Global Climate Change/Earth Day/Parish “Green” opportunities.

In all these ways, Marv and Ruth were instrumental in enabling Catholic Family Center to carry out effectively the advocacy and parish social ministry components of its mission statement.

C. CATHOLIC CHARITIES COMMUNITY SERVICES

1. Introduction

This three year time period was a time of exciting growth and transformation of Catholic Charities Community Services. Building upon the solid foundation of staff leadership, programs and infrastructure built by founding Executive Director Paul Pickering, who retired in early 2013 after thirty plus years of service, under the leadership of Executive Director Lori VanAuken, who assumed her position March 18, 2013, the agency moved forward in a number of directions. With an infusion of new Board members, a branding initiative was completed and a new strategic plan was adopted. Community awareness efforts were significantly enhanced. On the programmatic side, existing services were expanded through new grant funding and the agency took advantage of new service opportunities made available through the State’s Medicaid Redesign effort. Taken together, these initiatives enabled the agency to grow the number of persons served from just over 1,800 in 2011, to nearly 2,000 by the end of 2013, and over 3,000 by 2016. This growth was handled in such a way as to enable the agency to achieve a significant surplus. While Lori had inherited a strong leadership staff team, the significant program growth and normal staff transition, provided the opportunities for staff promotion from within as well as hiring new leadership from outside the agency. Symbolic of the transformation of the agency and fortuitous given the program expansion which required the hiring of a number of new staff members, the agency moved its main office to 1099 Jay Street effective July 1, 2013 and significantly expanded its office in Penn Yan during this time period.

Another important development with regard to the office situation occurred on September 16, 2013. That day, Catholic Charities Community Service celebrated the installation in the reception area of the *Spirit*, its Horses-on-Parade horse, who had spent the previous eleven years “grazing” in the field behind the agency’s former location in Irondequoit. Designed and painted by Belinda Bryce, *Spirit* is a symbol of the ups and downs and uncertainties of life, especially those felt by individuals living with HIV and AIDS. In its new location, *Spirit* serves as an inspiration to staff and clients.

2. Board Leadership

From the time of its creation in 1992 as a separate division of the Diocesan Catholic Charities Corporation, Catholic Charities Community Services had been well served by its Board leadership and members. This tradition of outstanding leadership was continued from 2009-2013 by Board Chairperson Ed Starowicz, an employee of the Town of Pittsford. He devoted an inordinate amount of time

to the work of the agency and had been a key figure in the hiring of Lori VanAuken. On July 1, 2013, Ed was succeeded in his role as Board Chairperson by Virgil Joseph, a banking professional. Virgil served throughout this time period and has agreed to extend his term through June, 2017. Virgil, Lori and the Nominating Committee have succeeded in recruiting a number of outstanding community leaders as Board members. Mention must be made of three outstanding members who served loyally for many years and left the Board during this time because they were term limited: Carol Girvin, Laura Maas and Nancy O'Mara. Two Board members who had previously served and had been term limited, returned; Daniel O'Neill, who had previously served as Chairperson, and Matt Livernash who had previously been Treasurer and returned to this position. Tim Sheehan effectively represented the agency on the Diocesan Board, serving as Chairperson of that group from 2013-2015 and continues as the CCCS representative on the Diocesan Board.

While the primary responsibility of the Board is the hiring of the Executive Director (in conjunction with the Diocesan Director of Catholic Charities), two other significant responsibilities are developing a strategic plan to give direction to the work of the agency and leading the fund-raising/community awareness work of the agency.

As a precursor to developing a strategic plan, the agency engaged in a branding effort facilitated by the organization then known as the Ad Council. The branding effort held in early 2014 resulted in the statement of the agency's brand promise to its customers/clients:

"We are driven to provide superior services, advocacy and compassionate support to empower individuals with disabilities and significant health challenges to live with dignity and recognize their full potential."

The Board began its strategic planning process in fall 2014 by surveying nearly 200 employees, donors, representatives of colleague agencies and clients/families. In a January 2015 full day facilitated workshop, attended by 34 key leaders, the group reviewed the environmental scan which had been done, determined a future direction statement, completed a SWOT analysis to set priority areas and goals and established work groups to develop strategies to achieve the goals established. The strategic plan was adopted by the Board on May 29, 2015.

The Future Direction statement adopted was:

"Community Services of Catholic Charities is a household name and the go-to-agency for comprehensive, efficient and effective services for the individuals we serve with the most talented, compassionate staff focused on supporting people to achieve their full potential."

Overall agency goals to be achieved by December 2018 were adopted as follows:

- Increase revenue from \$11.9 million to \$14 million
- Increase individuals served from 2,000 to 3,000

- Reduce staff turnover from 23% to below 20%
- Increase Net Promote Scan by 30% (41.8% - 54.5%)
- Diversify funding with non-public dollars from .8% to 2% (\$280,000)

The Board also took a leadership role in enhancing the visibility of its two major annual community-awareness/fund-raising events: the March Breakfast with Friends and the July Golf Tournament. Speakers at the Breakfast with Friends events were: 2014 – Jeanne White-Ginder, mother of Ryan White whose inspiring struggle with AIDS brought significant positive attention and funding to AIDS advocacy in the United States; 2015 – Matt Savage, noted concert pianist who had overcome significant disabilities; and 2016 – Noah Galloway, disabled war veteran who gained great fame on *Dancing With the Stars*. In 2015, the agency added two new awards: the Heart and Soul Award conferred by Bishop Matthew Clark on founding Executive Director Paul Pickering and the Community Champion Award given to Rene Reixach, legal advocate in the community for persons with disabilities. In 2016, Heart and Soul Award was presented by Jack Balinsky to Bishop Clark, and Wegmans’ received the Community Champion Award. The 2016 event was moved from Irondequoit Country Club where it had previously been held to the downtown Hyatt Hotel to accommodate a record crowd of 400 participants.

The golf tournament, held every July at Irondequoit Country Club, also grew in size and visibility, particularly with the addition of celebrity participants in 2015 and 2016.

The increasing amounts raised during this time period are reflected in dollars raised annually:

2013	\$124,527
2014	\$116,621
2015	\$155,880
2016	\$189,837

At this writing, the Board continues to be actively overseeing the work of outstanding staff and promoting the agency in the community.

3. Staff Leadership

Just as Catholic Charities Community Services would not have evolved so effectively to what it had become in 2013 without the extraordinary leadership of founding Executive Director Paul Pickering, the continued growth and expansion of services described here would not have been possible without the equally outstanding leadership of Lori VanAuken, hired as Executive Director effective March 18, 2013.

Born in Queens, NY, Lori moved upstate for her education, earning a Bachelor of Science Degree with a major in special and elementary education from the State University of New York College of Arts and Science at Geneseo and a Masters in Public Administration (Summa Cum Laude) from the State University of New York College at Brockport. Her ensuing professional career prepared her

exceptionally well for her leadership role at Catholic Charities Community Services. Highlights included:

- Program Coordinator at **Big Brothers/Big Sisters**, Rochester
- Director of Programs and Development for **Effective Parenting Information for Children**, Rochester
- Three different assignments over 9 years at the **Rochester Area Community Foundation**, including the last five years as a Program Officer.
- Seven years at the **Children’s Institute of the University of Rochester**, including three years as Deputy Director.

From these experiences, she learned the skills which have served her so well at Catholic Charities Community Services: administrative management, resource development, government relations, working with Boards, website development, grant writing and management and strategic planning, aided by her training in Six Sigma Green Belt methodology.

Upon her arrival, Lori was blessed with the strong, stable, experienced leadership staff assembled and nurtured by Paul. Leaders included Kathy Termine, Development Disabilities (whose 30th anniversary was celebrated in 2013); Tracy Boff, AIDS Services; Tracy McNett, TBI and Nursing Home Division program; Penny Coon, Quality Management; Tracy Kroft, Development; and Laura Crandall, Executive Assistant. While many other top level staff deserve recognition, special mention must be made of Donna Green and Diane Kruger, stalwarts in the Developmental Disabilities program in the central office who celebrated 30 year anniversaries in 2015, and Deb Flood and Bernie Gridley (who retired in 2015) in Penn Yan. Sheri Shepard and Cathy Feeley are other long-time employees who have made significant contributions.

Lori’s management style, changes in program services delivery requirements, and normal staff evolution led to changes in staffing during this three year period. With the advent of the Health Home program described below, in 2013, the AIDS Department was renamed Health Coordination and Support Services (HCSS) Department, because included now as clients in the Health Home program were persons suffering chronic illnesses, as well as those living with HIV/AIDS. Recognizing the significant growth of the agency and the need for Lori to focus on promoting the agency in the community, Tracy Boff was named to a newly created position, that of Deputy Director, effective January 1, 2014. Over the next two years, she would make enormous contributions in strengthening the internal administration of the agency and in obtaining grants. Phyllis McElligott was named as her replacement leading the HCSS Department. Throughout the three years, Kathy Termine continued to lead the Developmental Disabilities Department. Tracy McNett continued her leadership of the TBI Department. In summer, 2014, as a result of significant program growth, the TBI Department was joined under Tracy’s leadership with the Health Home Department to form the Care Coordination Department, resulting in the HCSS Department being renamed the Supportive Services Department, still under the leadership of Phyllis. In 2016, supervision of Medicaid Service Coordination was transferred from the Developmental Disabilities Department to the Care

Coordination Department. A major change shook the agency in spring 2016 when Tracy Boff announced she was accepting a position with the AIDS Institute in Albany. Lori and the Board spent a good deal of time analyzing how to best structure staff in light of continued growth and the proliferation of Medicaid initiatives described below. The new leadership staff position of Clinical and Medicaid Initiative Director was created. In August, 2016, Jim Kennedy, a professional with great experience in Medicaid, behavioral health and corporate compliance, was hired to fill this position.

On the administrative leadership support staff front, Laura Crandall, who had so ably served Paul and Lori as Executive Assistant took another position within the agency in summer 2016 and was ably replaced by Laurie Conlon. When Tracy Kroft left her position as Development Director in late 2014, she was effectively replaced by Joan Brandenburg who brought a wealth of communication and special events experience to the job.

4. Direct Services

a. Introduction

As indicated earlier, this three-year period was a time of significant growth at Catholic Charities Community Services. The number of clients served grew from 1,800 at the end of 2013, to approximately 2,000 in 2014, nearly 3,000 by the end of 2015 and 3,300 at the end of 2016. Two major developments previously described were the organization's structural changes made to accommodate the growth, as well as the significant impact of Medicaid reform, particularly the evolution of the Health Home program, which was a major driver in client growth. Described here in more detail are developments within the three major service departments: Developmental Disabilities, Care Coordination and Support Services, as well as three new Medicaid reform initiatives in which the agency is involved.

b. Developmental Disabilities Department

Under the leadership of Kathy Termine, this department continued to provide consistent quality services during this three year period. In 2013 services provided included:

- Residential programs, including community residences (8), individualized residential alternatives (3), and supported apartments (2), serving 90 individuals.
- Service coordination
- Day Habilitation
- Individual and Family Support Services

In 2013, the department received a 5 star rating from the New York State Office for Persons with Developmental Disabilities.

In 2014, the department added self-directed services and funding from the Daisy Marquis Jones Foundation provided touch series laptop computers and internet services to each of the houses. The results of the long awaited OPWDD "rate adjustment" were finally announced.

Rates for the agency's residential programs were increased but unfortunately rates for community-based services declined.

There were two major developments in the department in 2015. The agency established a new program to provide fiscal intermediary services for individuals living with developmental disabilities. Through this program, participants were given decision-making authority to recruit, hire, train and supervise the individuals who furnish their services. Services could include one-to-one staff, respite, employment services, education and training, therapies, transportation, housing subsidies and other supports. By the end of 2015, 30 participants were involved in this program.

The second major development in the department in 2015 was the opening of Pickering House, a three unit supportive apartment in Penn Yan, made possible through a collaborative effort with Providence Housing Development Corporation. Residents were transferred from the IRA in Penn Yan, thus helping the agency move to the long-term goal of reducing housing sizes.

In 2016, the agency began to address the "transformation agenda" of OPWDD. Elements included:

- Significant increase in "self-directed" plans
- Expansion of the Fiscal Intermediary Program
- Expansion of budget management Broker Services
- Initiation of a Medicaid Transportation program
- Increased pressure to down-size houses
- Another change early in 2016 included the MSC service moving to the care coordination department, allowing for deliberate cross training of care coordination services across all populations served. In 2016, the Department served 588 clients.

Description of the work of the department would be incomplete without mention of the deaths of clients, three in particular. Happily, the quality of residential services programs has been such that many of our residents have been with us since their houses opened. Unhappily, this reality means our client base is aging and death has become a more frequent visitor. During this time period, the agency was saddened by the deaths of long-term residents Larry Smith, Manuel Perez and Arlington Andrews. In 2015, through the generosity of a volunteer, a Manuel Perez Memorial Fund was established to develop funding for repair and upkeep of our homes.

c. Care Coordination Department

As summarized above, the Care Coordination Department was the department which underwent the greatest transformation during this three year period. At Bishop Clark's request, Catholic Charities had initiated in 1990 Mary's House, a modest housing initiative to serve women living with HIV/AIDS. The creation of the Housing

Opportunities for Persons with AIDS (HOPWA) significantly increased service opportunities for persons with AIDS, and which were quickly further augmented by Medicaid case management services. The AIDS Department was a major component of Catholic Charities Community Services for two decades until the beginning of this time period. The department was ably led by Jane Schur until 2007 when she retired and was replaced by Tracy Boff who had served as her deputy.

The area where Medicaid reform was to have its greatest impact was in the work of this department. Already in 2013, the name of the department was changed to the Health Coordination and Support Services Department (HCSS) to reflect the advent of a new State program initiative: Health Homes, through which services were provided to not only persons living with HIV/AIDS but also persons suffering from other chronic diseases such as diabetes, high blood pressure, asthma, COPD, mental illness and substance abuse.

Thought by some to be a physical facility, a Health Home is rather a virtual care management service model whereby all of an individual's caregivers communicate with one another so that all of a patient's needs are addressed in a comprehensive manner. This is done primarily through a "care manager" who oversees and provides access to all of the services an individual needs to assure that they receive everything necessary to stay healthy, out of the emergency room and out of the hospital. Health records are shared among providers so that services are not duplicated or neglected. Health Home services are provided through a network of organizations – providers, health plans and community-based organizations. When all the services are considered collectively, they become a care management operated virtual "Health Home."

Agencies that wanted to continue to work with the Medicaid population by providing care management were required to join a Health Home network. These networks (for an administrative fee of about 6% of total billing) provide administrative support, bill Medicaid, send referrals to agencies, make available care management software, provide training and assure agencies are complying with State regulations and requirements of the Health Home.

In 2013 alone, enhanced particularly by community outreach and engagement efforts, the number of persons served in the Health Home program increased by 600, so that by the end of 2013, overall, CCCS was serving 1,800 individuals.

Both through the Health Home program and through its ongoing work, services provided by the department included:

- Housing assistance
- Emergency food/rental/utility support
- Transportation

- Medication access
- Coordination of medical services
- Connection to employment and vocational services
- Assistance in navigation of social services

In summer 2014, the Health Home program and TBI services were combined to form the new Care Coordination Department, under the leadership of Tracy McNett, who had been Director of TBI and Nursing Home Transition and Diversion Services. (As described below, Phyllis McElligott became Director of what was to be known as the Supportive Services Department).

Beginning in 2014, the Care Coordination Department provided these specific services:

- Health Homes Care Management
- Outreach and Engagement Services
- Services Coordination for individuals with traumatic brain injury and those diverted from nursing home placements.

During the year, the number of clients served by the Department increased by 60%.

In 2015, the department continued to serve both those with chronic illness and traumatic brain injuries.

For those with chronic illness, services provided were:

- Connecting Medicaid-eligible individuals through case management to needed services and supports, included but not limited to benefits, medical, housing, financial, vocational and educational services.
- Providing support to return to work including benefits counseling so individuals could learn how to balance disability benefits while considering employment.
- Offering one-on-one or group counselling in nutrition, treatment adherence and maintaining a healthy lifestyle.

For those with Traumatic Brain Injuries, services provided were:

- Service coordination connecting individuals to medical benefits, housing, financial, vocational and educational services.
- Community Integration Counselling.
- Independent Living Skills.

The department also offered Nursing Home Transition Diversion waiver services including environmental modifications and assistance device technologies to enable individuals to remain in their own homes. Blessed by the continuation of so-called “legacy rates” for Health Home care management, the caseload continued to grow, serving 1,716 persons at the end of 2015.

In 2016, the major evolution in the department was assumption of supervision of Medicaid Service Coordination from the Development Disabilities Department. With this addition and continued growth in other services, the Department served 2,738 individuals in 2016. (In 2016, the Independent Living Skills Training for people who have a Traumatic Brain Injury was terminated due to lack of funds. Twelve clients were transferred to other agencies.)

d. Supportive Services Department

As previously described, the Supportive Services Department split off from the HCCS Department in summer 2014. Under the leadership of Phyllis McElligott, Services offered since that time have been:

- Housing assistance for HIV clients
- Emergency Rent and Utility Support
- Referrals to emergency food resources
- Transportation
- Health education and treatment support
- Benefits assistance and advocacy
- Preparation for employment
- Employment Services
- Home modification referrals
- Community integration counselling
- Independent Living Skills training
- Peer to Peer Outreach Support
- Permanency planning and guardianship

There were several program highlights during this time period:

- A new service established was the Linking Up Program funded by the NYS Department of Health-AIDS Institute, which uses peer navigators to link people with HIV/AIDS to behavioral health services.
- Community Services was awarded a grant of \$211,000 from the Balancing Incentive Program through the Office of People with Developmental Disabilities, NYS. The grant is intended to alleviate an individual's fear of losing Social Security Disability benefits upon entering or returning to the work force. In 2014 and 2015, Catholic Charities Community Services reached over 700 individuals, family members and professionals from across the state which demystified the notion that one cannot work while receiving disability benefits.
- Through the ACCES VR program, the agency was able to expand employment preparation planning, including benefits counselling, and support in job seeking and interviewing to those living in rural counties.
- Near the end of the time period, the agency received two major grants from the AIDS Institute to significantly expand housing opportunities for persons living with HIV/AIDS.

– In 2016, the Department served 227 individuals.

e. New Medicaid Initiatives

In addition to the impact of State Medicaid Redesign Team (MRT) initiatives on the existing work of the agency, their work also significantly impacted the work of Catholic Charities Community Services in three other major areas described below:

- Children’s Health Homes
- Delivery System Reform Incentive Payment Program (DSRIP)
- Home and Community-Based Waiver Services (HCBS)

As described above, their collective impact was so significant that when Tracy Boff resigned in June, 2016 from her position as Deputy Director, the Board and Lori, nimbly responding to new realities, reorganized leadership staff and hired Jim Kennedy as Director of Clinical and Medicaid Initiatives.

Children’s Health Homes

The “Brave New World” of Medicaid reform has provided not only challenges but opportunities. Together, four Upstate Diocesan Catholic Charities agencies have come together to create a jointly-governed Children’s Health Home. This is a significant development for the Catholic Charities family in New York State, akin to the creation in 1997 of Fidelis Care of New York, owned jointly by eight Catholic Dioceses.

Like any such development, it has required much work and collaboration over the past two years. Remote discussion of such a collaborative approach began at State Council of Catholic Charities Directors meetings in May 2013 and May 2014, when the Council Behavioral Health Committee, chaired by Lori Accardi from Binghamton, urged the Council to consider consolidated Statewide initiatives in the light of Medicaid reform. Further interest in some sort of collaborative effort was sparked in 2014 by presentations given to several Diocesan Catholic Charities agencies by Gerry Archibald from Bonadio about creating collaborative IPA’s (Independent Providers Associations) to provide leverage in negotiating rates with managed care organizations. Discussion about creating a multi-Diocesan Children’s Health Home was further advanced by widespread solicitation from Hillside and Northern Rivers in spring/summer 2014 for participation of Catholic Charities agencies throughout the State in the proposed Statewide Children’s Health Home. Feeling was expressed by many Catholic Charities leaders that rather than participating in an outside venture, this was a natural opportunity for Catholic Charities to create its own collaborative organization. In fall 2014, particularly before a gathering honoring retiring State Catholic Conference Charities staff person Earl Eichelberger on October 20, 2014, there was agreement that collectively Catholic Charities agencies didn’t have the leadership resources to develop both a multi-Diocesan

IPA and a Children's Health Home on a multi-Diocesan basis, and that pursuit of a Children's Health Home would be the first priority. This approach was endorsed first by the Upstate Charities Directors and then by the Council as a whole by the end of 2014.

A major reason for moving in this direction was that Binghamton Catholic Charities, a division of Catholic Charities of the Diocese of Syracuse, had been selected in early 2013 to administer an adult Health Home for Broome, Delaware and Tioga Counties and had done so very successfully both from a service perspective and from a financial perspective. It was the vision, sense of mission and generosity of spirit that led Syracuse Diocesan Charities Director Joe Slavik and Binghamton Charities and Health Home Director Lori Accardi to agree to become the lead agency in putting together a multi-Diocesan application to form a Children's Health Home. With considerable input from other Dioceses, their staff did the lion's share of the work to submit an application on March 3, 2015 for a seven Diocese (all but the Archdiocese of New York) collaborative Children's Health Home, adjusted at the last minute from the originally proposed upstate Diocesan approach. On June 15, 2015, Lori and her staff received word that approval had been received to administer a Children's Health Home in 48 upstate counties.

The eighteen months after that approval were a time of intense internal and external planning for this program, which is very similar to the adult health home, but of course with differences because of the younger target population. Major activities, with again the bulk of the work being carried out by staff from Binghamton Catholic Charities, undertaken in the eighteen months before the program became operational in December 2016 included:

- Several meetings or "readiness assessments" between Binghamton staff and representatives of the State Department of Health, featuring notification of several delays in implementation date (originally July 1, 2015) and notification of so many changes in mechanics of the program that the mantra arise that "the State is building the airplane as it is flying it."
- Also, externally, the scheduling of two series of outreach sessions in each of the Dioceses as information/provider recruiting efforts, which resulted in over 120 providers joining the network.
- Also externally, meetings with local Departments of Social Services, particularly around the foster care issue.
- Internally, regular meetings of the four Diocesan Directors (Albany, Syracuse, Rochester, Buffalo) involved in the program. (Although a number of the 48 counties for which approval was given are in the Ogdensburg Diocese, their Catholic Charities agency has chosen, up to now, not to participate.) These meetings have focused on:

- * Continued reports from Lori and staff on the evolving program;
- * Developing a structure for the new organization;
- * Choosing a name – Encompass Family Health Home;
- * Developing policies of adherence to Catholic Social Teaching and gaining approval from the Department of Health for these policies;
- * Limitation and allocation of liability responsibility (Syracuse Catholic Charities bears this responsibility).
- * Various logistical, mechanical program issues such as the decision to use the NetSmart software system;
- * Gaining approval from the four participating Bishops. (After his own review, input from staff and Diocesan attorneys, Bishop Matano gave his approval on April 12, 2016);
- * Building a regionalized staff structure.

These efforts culminated in an historic event occurring on August 30, 2016 when the four Diocesan Directors and Mike Lawler, staff from the State Catholic Conference voted to create the Encompass Family Health Home LLC. The sole member of the corporation is Catholic Charities of the Diocese of Syracuse. Board members are the four Diocesan Directors (Vince Colonno – Albany, Joe Slavik – Syracuse, Jack Balinsky – Rochester and Dennis Walczyk – Buffalo and Mike Lawler from the State Catholic Conference). Lori Accardi was appointed as Executive Director.

Already on August 30th, the Board began adopting policies such as bank resolutions, to enable the corporation to function administratively. Also at the Board meeting, members were informed that Encompass Family Health Home had been notified the previous week that it had been allocated a start-up grant of \$1.8 million, to be spent over the next year for a series of start-up activities. It was indicated that seed grants of \$100,000 would be made available to the participating Dioceses to develop a regional staff structure reporting to the Binghamton office. Catholic Charities Community Services received this funding to become a regional administrative hub for Encompass.

Delivery System Reform Incentive Payment Program (DSRIP)

While the Department of Health has implemented major new program initiatives such as Health Homes, and moved many existing programs to a managed care approach, the centerpiece of the work of the Medicaid Redesign Team has become known as the DSRIP program.

In February, 2012, the State submitted to the Federal government a proposal for a \$10 billion waiver to enable more cost effective provision of services to the high risk population. After two years of intense negotiation between the State and Federal governments, in February 2014, the State was granted an \$8 billion waiver over five

years if it could achieve three goals: 25% reduction in emergency room visits, 25% reduction in hospital admissions, and 25% reduction in hospital readmissions. Two important factors of this waiver approach are the integration of health care and behavioral health services, and recognition (with substantially increased funding a boon to Providence Housing) that safe affordable housing is one of the most important factors in stabilizing families and reducing Medicaid costs.

To administer this program, applications were sought and approval given (in record speed) for the establishment throughout the State of 23 Performing Provider Systems. The Finger Lakes PPS covers almost all of our 12 County Diocese, and is divided into five Naturally Occurring Care Networks. The Steering Committee was appointed on April 9, 2014. Ironically, for a program whose goal is to reduce hospital involvement and develop integrated community-based services, the joint owners of FLPPS are the two major hospital systems – URMC and the Rochester Regional Health System.

Another troubling aspect of DSRIP is the proposed shift over time from fee-for-service reimbursement methodology to Value Based Payment (VBP). A major challenge in this approach is in establishing concrete measures of what are “value propositions”. There has been discussion about such complex methodologies as episodic bundles or integrated primary care bundles. A second challenge is that the State has established VBP target spend thresholds for managed care organizations that are extremely ambitious. The State has mandated that 10% of a plans Medicaid expenditures flow through VBP arrangements by the end of the 2017 State fiscal year, 50% by the end of the 2018 State fiscal year, and 80% by the end of 2019 State fiscal year. This whole arena certainly presents many future challenges for providers like Catholic Charities.

Catholic Charities Community Services, along with Catholic Family Center and Catholic Charities of Chemung/Schulyer Counties, has participated in this process from the beginning. The amount of paperwork describing our agencies that was submitted and participation in the seemingly endless series of committee and subcommittee meetings have been an enormous drain of our leadership staff resources.

Catholic Charities Community Services, however, has begun to receive benefits from its participation, receiving payments totaling \$64,000.

In addition, through this work the agency added a new assessment tool, called the Patient Activation Measure. All CCCS outreach and care management staff have adopted this new tool, which will eventually be extended to all clients.

Home and Community-Based Services Waiver Program (HCBS)

Like the Children’s Health Home initiative and DSRIP activities, the creation of the Home and Community-Based Services program has presented to our agency new opportunities as well as significant challenges.

Like the Health Home approach, the State has initiated, effective downstate on January 1, 2016 and upstate on October 1, 2016, a new approach to providing managed care services to a specific high risk populations – those with mental illness and substance abuse issues. This initiative is entitled Health and Recovery Plans (HARP). Adults enrolled in Medicaid and 21 years or older with select Serious Mental Illness (SMI) and Substance Abuse Disorder diagnosis having serious behavioral health issues are eligible to enroll in this program. This program will be operated on a Statewide basis by Managed Care organizations. HARPs will arrange for access to a benefit package for Home and Community-Based Services for members who are deemed eligible.

Services which have been approved by DOH, OASAS and OMH, that will be provided by Catholic Charities agencies in our Diocese include:

- Habilitation
- Family Support and Training
- Education Support Services
- Empowerment Services/Peer Support
- Pre-Vocational
- Intensive Supported Employment
- Ongoing Supported Employment
- Psycho-Social Rehabilitation

Particular services to be offered by Catholic Charities agencies are:

	Habilitation	Family Support & Trng	Education Support Services	Empowerment Services/Peer Support	Pre Voc	Intensive Supported Employment	On-going Supported Employment	Pyscho Social Rehab
CFC		X		X	X	X	X	
Livingston	X	X	X	X	X	X	X	X
Community Services	X	X	X	X	X	X	X	X
Chemung	X							X
Steuben				X				
Tompkins/Tioga	X	X	X		X	X	X	
Finger Lakes								
Wayne								

For all agencies participating in this program, there will be additional requirements:

- Participating agencies will have to be able to access the State Health Commerce System and complete the training in the Uniform Assessment System for New York State, so that care

managers can complete eligibility assessments for potential HARP/HCBS clients.

- Agencies will have to hire staff that meet rigorous education and experience requirements.

For those of our agencies newly involved in providing Medicaid services there will be other external and internal requirements:

- Most significantly, adding a local compliance plan hopefully developed in a collaborative fashion through the evolving Diocesan Corporate Compliance office.
- Establishing contractual relations with Managed Care Organizations (for the contract with Fidelis, Diocesan Catholic Charities explored the possibility of developing one contract for the corporation, but ultimately decided because of our billing system that it was more efficient to have each agency contract separately).
- Through upgrades of health information technology, assuring that client data base systems are sufficient to track services.
- Modifying billing systems to accommodate this new program.
- Finding the time and appropriate opportunity to assure sufficient training of staff.
- Working out effective coordination between regional agencies and Catholic Charities Community Services which has a Diocesan-wide program for persons with developmental disabilities and care coordination.
- With uncertainty of number of referrals, developing a plan for adding staff without becoming overstaffed because of lack of referrals.

To assist in ramping up this program, each of the agencies has received start-up grants, both for general expenses such as health information technology, IT upgrades, corporate compliance programs and training.

5. Community Awareness and Advocacy

Through Lori's participation in the New York State Council of Catholic Charities Directors and its Disabilities Committee as well as participation of Lori and her staff in NYSACRA and the Rochester Area Task Force on AIDS, Catholic Charities Community Services has been heavily involved in advocacy around State policies relating to developmental disabilities and Medicaid reform.

Two specific examples of this advocacy were successful efforts to restore \$29 million in funding in 2014 for community-based programs for persons with developmental disabilities and her current work with OPWDD relating to "conflict-free" provision of case management services.

Through its Breakfast with Friends, the agency continued to bring community attention to the needs of those services:

- In 2014, the HIV/AIDS population through the presentation of Jeanne White-Ginder.

- In 2015, persons on the autism spectrum through the presentation of Matt Savage.
- In 2016, persons with physical disabilities through the presentation of Noah Galloway.

D. CATHOLIC CHARITIES OF THE FINGER LAKES

1. Introduction

For Catholic Charities of the Finger Lakes, this three year time period was a time of financial stability, active response to emerging needs and program expansion. Through a time of transition in Board leadership, the Board developed a comprehensive strategic plan, maintained financial and programmatic oversight, continued the Sharing the Light Dinner and added a new fundraising event, Hoedown for Hunger. Following the reorganization of the staff structure occasioned by the departure of Laurie Trojner, long-time Director of the Auburn office, this time period was one of stability among leadership staff. Despite transition in the Justice and Peace coordinator staff position, the agency maintained its priority attention to education and advocacy on social justice issues and connection with parishes.

2. Board Leadership

Bob McFadden, a Geneva banking executive, had taken over the reins as Board chairperson in 2011, and provided pro-active leadership for three years. In spring 2014, he decided to continue his educational pursuits and to resign his position as Board chairperson. Longtime Catholic Charities of the Finger Lakes volunteer leader Robert Kernan, who had previously served as Board chairperson, during which time he significantly strengthened the Board by recruiting new members, generously agreed to return to the role on an interim basis for one year. In July, 2015, Mary Luckern, a long-time Geneva educator and civic leader, and former Board member was elected as Chairperson and continued to serve through the end of 2016.

A sign of confidence in Executive Director Ellen Wayne’s leadership and a deep commitment to Catholic Charities was the return of four former Board members during this time. Bob Kernan and Mary Luckern were joined by Tim Buckley and Linda Farchione Hawks in this renewed commitment.

Along with the hiring of and collaboration with the Executive Director, one of the most important roles of a not-for-profit Board is developing and implementing a Strategic Plan. In 2014, Board members Rich Kasulke, Chris Vitale and Father Roy Kiggins, as a part of their responsibilities on the Program Planning and Evaluation Committee, oversaw a process through which the agency’s Strategic Plan was updated. Beginning with a staff retreat and planning session, the agency embarked on a comprehensive process that included participants from Board, volunteers, community partners, clients and other key stakeholders.

Strategic priorities determined through the process were

- **We will make a difference via programs that have meaningful impact in our communities** including building on our core competencies and

expanding our programs and services portfolio to fill gaps in our communities;

- **We will see strong support from the communities we serve** including creating clarity and understanding of purpose, strengthening financial support and encouraging volunteer service;
- **We will sustain our agency through stable funding and growth** including diversifying the funding that supports our efforts; and
- **In order to effectively serve our constituents we will improve our infrastructure** by encouraging better internal and external communications, improve integration of technology and effectively manage our facilities.

Throughout this time period, banking executive Board member Menzo Case continued to lead the Board in its responsibility of financial oversight through his work as Chairperson of the Finance Committee. Through his work and new program opportunities described below, the fiscal health of the agency improved considerably. After struggles of several years, ARRA program audit issues stemming from the collaborative endeavor with Action for a Better Community were resolved in 2016.

A second aspect of Board oversight and decision-making relative to finances was continuing discussion and decision to make significant internal improvements in the agency's main office facility, shared with the Diocesan Catholic Charities Finance Office. In addition to needed roof repairs, the office was restructured in 2016 to create a larger, accessible conference room on the first floor. This project was ably overseen by Board member Shad Cook. There was some discussion about sale of the agency's facility in Auburn, but it was decided such a sale would not benefit the agency financially.

Finally with regard to the responsibilities in the area of fund-raising, the agency sponsored its signature event, the Sharing the Light dinner, held in June each year at Hobart William Smith College. (Board members Joan McCadden, Lisa Hubler and Phyllis Devito helped with these events.)

Award winners in 2014 were:

**Jewel Hara
Linda Farchione Hawks
Gerald Macaluso
Joan McCadden
William & Rosalie McEvily**

Award winners in 2015 were:

**Maxine Alberici
Menzo Case
Thomas McClure
Sandi Perl
Frank & Donna Pullano
Marcia Webster**

Award winners in 2016 were:

Debbie Cornall
Len and Shirley DeFrancesco
Peter and Gretchen Koch
Father Thomas Mull
Linda Raide

In 2014 Bishop Matano presented the VITA award to Claude Lester and in 2016, he presented the same award to Liz Gilges.

Beginning in 2014, the agency sponsored a September Hoedown for Hunger Event. Each of the three years, the event grew in size, with the 2016 event held at Geneva on the Lake thanks to the generosity of manager Bill Schickel. Together with annual Empty Bowl events held in October in Geneva, Canandaigua and Auburn, the agency not only gained financial support, but made significant contributions to increasing community awareness about the problem of hunger.

3. Staff Leadership

Throughout this time period, there was stability in the key leadership positions at the agency. Ellen Wayne continued her outstanding work as Executive Director making possible many of the accomplishments described here. When she was hired in September, 2007, she brought both human services administration and fund-raising experience to her work at the agency. She had worked for five years in a high level administrative position within the Seneca County Department of Social Services and then had been director of development for the ABC anti-poverty agency in Rochester.

A woman of boundless energy, she not only was successful in this time frame at her work in the agency, but also in 2013 achieved a Doctoral Degree of Education in Executive Leadership from St. John Fisher, after several years of class participation and a research project on Catholic Identity in Catholic Charities.

In addition, in 2015, Ellen made a significant contribution to Diocesan Catholic Charities by organizing and conducting a Leadership Development Program. The leadership development function needs to be given priority in an organization as large and diverse as Rochester Catholic Charities. Jack had organized such a program, leading the effort himself and inviting in appropriate practitioners as presenters in 2003, 2007 and 2011. It was time again to do so in 2015. After she received her doctoral degree, Ellen had become a faculty member in a program run by Fisher's Center on Community Engagement, which provided participants successfully completing the program with a Certificate in Not-for-Profit administration. In late 2014, Jack and Ellen were able to negotiate with the Center's leaders, Howard Berman and Fran Weisberg, development of a customized program for Catholic Charities staff, which would result in awarding this same certificate to those who successfully completed this program. With collaboration and support from the Executive staff, 25 "up and coming" staff

from our agencies were selected for participation in the program. Classes were held every other Tuesday morning at the Excellus training facility in Waterloo which was donated for this program. The curriculum included the material used in the Fisher program relating to a variety of administrative functions. Some classes were taught by staff from the Fisher program. Ellen invited various guest speakers as appropriate. Through Ellen's regular presence, two presentations by Jack, and the choice of speakers, special attention was always given to general issues of Catholic identity and specifically to the work of Rochester Catholic Charities. (Jack's book on the 100 year history of Rochester Catholic Charities was given to every participant). Twenty-four out of 25 participants graduated and were given certificates. It was understood from the beginning that successful completion of the program would give participants "a leg up" in consideration for internal promotion with Catholic Charities. One unforeseen benefit of the program was that staff involved learned a great deal (and were often surprised or amazed) about the services provided by sister agencies of which they had been unaware. At the end of the program, Ellen was duly recognized as the Executive staff expressed her appreciation for going "above and beyond".

When Laurie Trojner left her position as Director of the Auburn office in 2012, Ellen reorganized the staff and named long-time staff member Bill Lamb Director of Program Services. Bill, a long-time employee and program supervisor for Ontario programs, brought to the position a keen understanding of the communities the agency serves, and dedication to meeting the needs of poor and vulnerable that reside in them. In this position, Bill truly has been Ellen's right-hand person in organizing and supervising service delivery.

The agency was considerably strengthened in fall, 2013, when Stu Einstein, former mayor of Geneva, was hired to coordinate the agency's signature program, the Community Lunch program. His community connectedness and energetic leadership helped to strengthen relationships with the faith and civic communities in Geneva, as well as volunteer participation in the program.

Since the early 1980's, Rhonda Zettlemoyer, Office Manager, has been the "heart and soul" of the agency, tirelessly organizing a variety of initiatives, including especially the Sharing the Light Dinner and the Hoedown for Hunger. She also serves as the person with "institutional memory" of the agency, a key contributing factor to her expert managing of agency administration. In addition, she, along with Ellen, has generously provided hospitality and refreshments for the many Diocesan staff and Board committee meetings held at Catholic Charities of the Finger Lakes.

4. Direct Services

a. Introduction

Direct services provided by the agency in this three year period are described as follows:

- Overview of Services 2013
- Overview of Services 2014
- Program Transition and Expansion
- Two Special Initiatives

- Overview of Services 2015
- Overview of Services 2016

b. Overview of Services 2013

In the program year 2013, Catholic Charities of the Finger Lakes provided services to close to 4,000 households, including emergency assistance, programs through the child and Families Services division designed to help build family stability, and programs through the Adult and Community Outreach division to help families achieve financial stability.

Key service statistics for 2013 were:

- 11,014 meals provided at the Community Lunch program
- 237 households received direct utility emergency assistance
- 132 households received emergency housing assistance
- 2,575 households received HEAP heating assistance
- 159 households participated in case management

During the year the agency noticed several trends in the clients being served:

- Better than 53% of the households served had a head of household with a high school or better education level
- Close to 80% of households reported at least one source of earned income
- Households headed by a single female parent made up the greatest percentage of households served. However, this group is closely followed by households with two parents present
- Approximately 85% of the households served have total household income at or below 150% of the Federal Poverty Level

c. Overview of Services 2014

Key service highlights in 2014 were:

- The Community Lunch program served 14,200 meals
- 3,000 persons received emergency assistance, predominantly through the HEAP program
- Case management services were provided to 64 families
- 32 persons benefitted from SSI advocacy

d. Program Transition and Expansion

Catholic Charities of the Finger Lakes is the only Catholic Charities agency which serves four counties: Cayuga, Ontario, Seneca and Yates. Described here by county are program transitions and expansion by County during this time period.

Cayuga County

There was significant transition and expansion of services in Cayuga County in this time period. The HEAP heating assistance program had been the major service provided over many years at the Auburn

office. For the 2014-2015, county government changed its approach to administering this program. For this reason, the county itself administered the majority of the certification program and asked Catholic Charities to do early outreach, on-line certification and alternative certification. For 2015-2016 heating season, in response to an RFP, the agency submitted a proposal which covered the actual costs of administering the program, and the County chose another service provider. The HEAP program was then discontinued.

On the other hand, there was program growth in the county with the addition of two new programs/positions for the Drug Court and Homeless Coordinator positions. One staff member is located in the court house and one at the County office.

Hence, at the end of this two year period, services provided in Cayuga County included:

- SSI coordination
- Emergency Assistance
- Supervised visitation
- Family Case Management

Ontario County

Ontario County is the county with the greatest amount of resources within the Finger Lakes Catholic Charities services area. It has been home to the agency's main office since 1982.

During this time period, there was significant expansion beyond the existing services: the agency's signature program, the Community Lunch program, emergency assistance, supervised visitation and family case management.

In late 2014, Catholic Charities entered into a unique joint venture with Providence Housing Development Corporation to provide case management services to eight homeless funds in Clark Park in Geneva. Formal participation in comprehensive case management, information and referral and counselling is required of all residents. In late 2015 and early 2016, there were several other new services added, including an SSI coordination, and two Homeless coordinators – one located in Geneva and one in Canandaigua.

In summer, 2016, through funding from Community Services Block Grant funds, the agency organized a short term fast turn-around back-to-school backpack program which provided more than 200 backpacks to needy students. Partners in the effort were faith groups, food pantries, the Department of Social Services and Head Start programs.

Seneca County

Historically, before this time period, the agency had little physical presence in Seneca County. During this time period, emergency assistance was offered for the first time as well with a small case management program with the agency receiving funding for counselling from the United Way.

Yates County

The evolution of services in Yates County during this time period was very similar to that in Seneca County, with the establishment of emergency assistance, supervised visitation and family case management services. The agency procured office space for a part-time staff person at a facility rented by Catholic Charities Community Services at Keuka Office Park in Penn Yan. The development of these services is described in the next section.

e. Two Special Initiatives

During this three year time period, the agency undertook two major initiatives in response to emergency needs – flooding in Ontario and Yates Counties in 2014 and the increasing recognition of the problem of homelessness in Canandaigua.

A severe weather event was realized across the Finger Lakes on 5/14/14, bringing damaging rain and wind, severe flooding and significant damage to several locations in Ontario and Yates County, most notably in Penn Yan. In the days that followed, continued rain further compromised the situation in Penn Yan and the surrounding area. Initial estimates for damage within that small village exceeded \$5 million dollars. However, those estimates represented only the first days of assessment. More than 200 properties were initially identified through damage assessment efforts as moderate to severely damaged, with 12 condemned on the first day. Catholic Charities of the Finger Lakes, along with community partners including the Living Well Ministries, Salvation Army, Red Cross, and local inter-faith ministries immediately began a process of outreach, identifying households whose needs ranged from temporary and permanent displaced housing, loss of food, transportation, personal care items and more. The rural nature of the community and the broad path of the storm that forced road closings and stranded residents in their homes combined for challenging conditions to identify and respond to individuals and households in need.

Catholic Charities of the Finger Lakes made the decision to set up a temporary office in the Village of Penn Yan, and with the gracious support of Living Well Ministries, Catholic Charities was able to have staff working on location immediately and throughout that first critical weekend. Through a grant from Catholic Charities USA, the agency reached more than 100 individuals in the first few days post flood, responding to basic needs that included food, housing and cleaning supplies.

As the community-wide response took shape, and efforts moved from crisis response to long-term recovery, Catholic Charities of the Finger Lakes decided to maintain its Emergency Assistance staff office in Penn Yan indefinitely. Through a partnership with the Living Well Ministries, an organization displaced from their own offices due to flood damage, staff were co-located within their temporary office and then relocated to the permanent office once the location was cleared as safe.

What started as an on the ground response to an emergency need became a thriving partnership in which Catholic Charities of the Finger Lakes now works with more than 20 households each month, addressing basic needs and plans for long-term self-sufficiency. Physical presence in Penn Yan continued to grow as the agency has secured access to two additional sites to provide supervised visitation and case management services to children and families involved with the family court system. The strengthening of services in Penn Yan through localized service sites is one of the many examples of how the agency is improving its infrastructure to more effectively meet the needs of the individuals served.

On a snowy day in February 2014 more than 100 people came together to address the growing number of instances of homelessness in Canandaigua and the greater Western Ontario County region. The participants represented diverse faith congregations, social services agencies, concerned community members and current and former homeless individuals. Collectively they agreed that the issue could no longer be ignored.

The focus of that first meeting was identifying immediate needs, putting in place a foundation for long term planning, the sharing of information and strengthening partnerships currently in place to respond to the need. The gathering was as much about awareness as it was a call to action. The information sharing helped to provide clarity and the planning helped to establish the foundation for moving forward to meet immediate and long term needs of homeless and vulnerable residents of the greater Canandaigua community.

From the first meeting, and the smaller sessions that followed, Catholic Charities of the Finger Lakes and its community partners were able to implement a system that provided a response to the basic need of personal hygiene. Access to showers, identified as a priority need at that first meeting, was recognized as both a barrier to employment as well as an affront to basic human dignity. Collectively, the group developed a referral and voucher system, affording identified homeless individuals with an opportunity to use facilities at the Canandaigua Family YMCA to shower. Additionally, Catholic Charities of the Finger Lakes secured vendors and established a voucher system that provided access to laundry facilities for individuals. As a result, a significant step was taken in

preserving the dignity of this vulnerable population while working to address the bigger issue of homelessness.

Building upon previous collaborative work with the Canandaigua Churches in Action organization and Thompson Hospital to develop an outreach health clinic (subsequently taken over by Jordan Health Center) and other initiatives. A Resource Room for the Homeless was established in 2016.

f. Overview of Services 2015

In 2015, agency service highlights included:

- More than 1,301 households received direct assistance to prevent a utility disconnection
- Homeless intervention and support services were provided to more than 723 households
- The agency partnered with area providers and volunteers to conduct comprehensive homeless counts across Ontario County, identifying individuals and families in need of housing and related support services. In the three point in time counts 67 volunteers found 12 unsheltered homeless individuals.
- Supervised visitation services were expanded into Yates County. More than 87 families received this crucial support service across Ontario, Cayuga and Yates counties.
- More than 14,000 meals were served at the Geneva Community Lunch Program
- 130 households received comprehensive case management support services, addressing income and family stability, basic needs and more.

g. Overview of Services 2016

In 2016, agency service highlights included:

- The Community Lunch program served 13, 780 meals
- Emergency Assistance was provided to 2,300 households, including:
 - * Utility assistance – 582 households
 - * Transportation assistance – 284 households
 - * Heating assistance – 378 households
 - * Basic needs – 162 households
- Case Management Services were provided as follows:
 - * Supervised Visitation – 110 households
 - * Family Case Management – 52 families
 - * SSI Case Management – 95 households

At the very end of 2016, the agency was informed that it had received a State grant of \$150,000 a year for five years to provide post-adoption and post-guardianship support services in four counties: Ontario, Seneca, Yates and Wayne (in collaboration with Catholic Charities of Wayne County.) There will be close collaboration with the Foster Care and Family Court system. This

program will afford Catholic Charities of the Finger Lakes opportunities to touch families it has not previously served.

5. Advocacy and Parish Social Ministry

Carrying on the excellent work initiated by founding Executive Director Giovina Coroscio from the agency's very beginning in 1982, Ellen Wayne and her staff continued giving priority attention to these two important elements of the agency's mission statement.

Laurie Konwinski served as part-time Justice and Peace coordinator until June, 2015, when she took a full-time job at Catholic Charities of Tompkins/Tioga Counties where she had also been part-time Justice and Peace coordinator. She was replaced briefly by Tom Geary in spring 2016, and more permanently by Deacon Greg Kiley, from the Clyde/Lyons/Savannah parish, who began his part-time work in June, 2016, as well as taking the same position part-time at Catholic Charities of Wayne County.

Ellen and staff continued their process of regular annual visits with pastoral leaders, to listen to their concerns, offer the agency's services and discuss areas of possible collaboration. One typical example of this dialogue was the connection made by Ellen with Father Jim Hennessey from Seneca Falls about the possibility of using the school for a Providence Housing project.

Ellen and Staff organized several opportunities for educational programs on social justice issues. One example during 2014-2015 was a series of discussions on poverty, specifically the book "Hand-to-Mouth: Living in Bootstrap America" by Linda Tirado. A second example was a discussion series organized with Hobart William Smith College on the Just Neighbors program.

From a public policy perspective, the organization participated in the work of the Diocesan Public Policy Committee, especially summer legislative visits and the annual petition advocacy effort. Because of the energetic leadership at the parish level from Deacon Claude Lester, St. Benedict's parish in Canandaigua and East Bloomfield, annually gathered the largest number of petition signatures, generally around 500, to be delivered to their State Assemblyman, Minority Leader Brian Kolb.

The agency also worked with local parish social ministry groups to address local issues. Three such issues discussed during this time were:

- The rent-to-own issue in Seneca County
- The landfill issue in Seneca and Ontario Counties
- The clean water issue in Cayuga County

E. CATHOLIC CHARITIES OF LIVINGSTON COUNTY

1. Introduction

After a somewhat rocky three year transition period, by July 1, 2013, when Tabitha Brewster was appointed Executive Director, the agency was stabilized financially, staff-wise and programmatically, and poised to make even greater contributions to the Livingston County community. During this three year

period, under Tabitha's leadership, with significant contribution from a strong Board, the agency expanded services through additional County contracts and then by joining "the Brave New World" of Medicaid service provision. Board leadership not only oversaw the growth of the agency, but also became much more heavily involved in planning and promoting fund-raising events, including the 20th anniversary celebration in December 2015, and providing on-site volunteer assistance to the agency. The quality staff which had been assembled by July, 2013 largely remained in place, augmented by new hires to manage added programmatic responsibilities. Approval in early 2016 to participate in the Medicaid-funded Home and Community-Based Services Waiver Program led to the need for significant staff training, and, made possible through State-start-up grants, the evolution of the agency's IT system. A newly created Board committee, the Parish Social Ministry Committee, helped the agency focus more on its mission components of advocacy and parish social ministry.

2. Board Leadership

Two unique features characterized the Board during this time period. First, compared to other agency Boards and church groups more generally, there were a number of relatively young Board members, enabling the Livingston Board to serve as a model for Catholic Charities of the Diocese. Second, numerous Board members were involved in "hands-on" volunteering in numerous functions at the agency.

Wes Kennison, who played an important role in guiding the agency through its transition period, concluded his term as Board Chairperson on December 31, 2013. He was succeeded by Jeff Fasoldt, one of the younger generation of Board members, who was a Toshiba employee at the time and had gained significant financial support from his company for the agency's fund-raising events. Jeff served as Chairperson through the remainder of the time period. In terms of Board leadership, mention must be made of the outstanding contributions of long-term Board member Deborah Farberman. As Wes Kennison's responsibilities at the college at Geneseo changed and he was required to travel more, as Vice-Chairperson, Deb took a more active role in leading the Board and serving as support for Tabitha. She continued this prominent role in assisting Jeff, whose job also took him away sometimes from participating in meetings. Happily, Deb continues in this role, as well as making significant contributions to fund-raising efforts, as described below.

Besides hiring and supporting the Executive Director, the most important function of any Board is assuring the fiscal stability of the agency as well as monitoring program quality.

Fiscal oversight was effectively maintained in this time period by a Finance Committee comprised of Tom Baldwin, Andy Kubrich and Jeff Fasoldt. Particular credit must be given to Tom for his "eagle-eye" oversight of finances, but also the many other ways he supported the agency, including through his role as a member of the Livingston County Board of Supervisors.

Another very important role of the Board is overseeing fund-raising events. By July 2013, the Board had developed a regular routine of annual fund-raising initiatives:

- The January “Eat for Heat” dinner sponsored by St. Matthew’s parish in Livonia.
- The May Spelling Bee
- The August parish appeal
- The October annual dinner, featuring presentation of the Father Trott Award
- The December St. Nicholas appeal

Funds raised through these initiatives were:

2013	\$169,378
2014	\$141,090
2015	\$185,443
2016	\$134,644

Initiated through the leadership of St. Matthew’s pastor and long-time Catholic Charities Board member, Father John Hayes, the “Eat for Heat” dinner raised annually approximately \$8,000, 100% of which was used for emergency assistance for clients. Invaluable assistance for this event was provided by pastoral associate Alice Miller Nation and Tammy Hall, Coordinator of CCLC’s Help*Works program. In 2016, the event was held at Camp Stella Maris because of changes at the parish but is returning to St. Matthew’s in 2017.

After much Board discussion, the agency replaced the annual golf tournament with a Spelling Bee as a spring fund-raiser. The first event was held at the college in 2011, and the subsequent three years the event was held at the High School. Fund-raising proceeds were about the same as for the golf tournament, but it was felt that a positive outcome was broader community participation and awareness of Catholic Charities. Another positive was the significant contribution of Wegmans in putting on the pre-Bee spaghetti dinner. A concern, however, was the inordinate staff time needed to help organize the event. In 2016, as an effort to try a new and fresher approach, the agency organized an August fun-day carnival-like event at Long Point Park. Again, while there were some positives, concerns at this writing remain about the cost effectiveness of this type of event in light of the staff-time required.

When Livingston County pastoral leaders, at the urging of Father Dan Condon, the “Godfather” of the agency, played a prominent role in the establishment of Catholic Charities of Livingston County in 1995, they agreed to annually hold a second collection in August to benefit the agency. This initiative provided opportunities for representatives of the agency to make presentations about its work at weekend masses. Over the years, this event was broadened somewhat to become the August appeal. Envelopes were available in Church for subsequent contributions to supplement funds received in the actual collection. Not only was this initiative an important source of funds for the agency, but also an important way to inform parishioners of the good work of the agency.

It was in organizing the annual fall event that Board members began to assume a more active role, beginning in 2012. In the early years, this event was held in modest fashion at St. Mary's in Geneseo. By the early 2000's, it evolved into a more formal dinner event held for several years at the Genesee Riverside Restaurant in Mt. Morris, as well as the Quality Inn in Geneseo. Board stalwarts active in planning the event in the years leading up to this time period and in 2013 and 2014 were Mary Anne Palermo, Elaine Bucci, Margaret Nichols, Deb Farberman and Pam Rychlicki.

In 2013, because of the high cost of holding the event at the Genesee River Reception Center, and to bring a fresh look to the event, it was held at the Twin Silos Barn in Livonia. The Father Trott Award was conferred to **Mel and Carol Bauman** for their many volunteer contributions to the agency, including Carol's extraordinary commitment of time to grant writing.

For 2014 the committee decided for a variety of reasons to return the event to the Genesee River Reception Center. The Father Trott Award was presented to **Bill Lissow**, a long-time volunteer in the Hope Youth Mentoring program, who had reinvigorated the furniture program after his semi-retirement.

With planning for the 2015 event, which was to serve as the main celebration of the agency's 20th anniversary, a new group of Board volunteer leaders came to the fore to take a leadership role in planning the event. So was born the concept of what has become the agency's "signature event, the Red Carpet Christmas Gala. Volunteer leaders in planning the event were Renee Book, Jen Perelli, Kate Alonzo and Nita Genova with continuing assistance from the likes of Mary Ann Palermo, Margaret Nichols, Deb Farberman and Pam Rychlicki. Their leadership was particularly helpful in lessening the burden on staff. (Over this time period, at different times, both Nicole Ricker and Michelle Dourie had devoted considerable time to planning fund-raising events). The December, 2015 event was held at the refurbished Oak Valley Event Center in Geneseo and attended by a capacity crowd of 200 persons. The Father Trott award was presented to **Art and Pam Hatton** – Art for his contributions as chair of the Development Committee and his three years as Board Chairperson, and Pam for her long-time work as a volunteer at the Food Pantry. The second annual Red Carpet Christmas Gala was also held at the Oak Valley Event Center in December 2016 and was also well attended. The Father Trott Award was presented to Diocesan Director **Jack Balinsky**.

The final annual fund-raising event organized by the Board and staff has been the annual St. Nicholas Appeal. Like each of the other fund-raising activities described here, this initiative had grown significantly over the years to the point where annual giving in the initiative now regularly exceeds \$30,000. Three factors have helped this success – the ability of the agency to attract several larger gifts, the improvement in the database through the installation of Raiser's Edge fund-raising software, and increased volunteer contribution to the enormous logistical task of preparing the mailing and recording contributions. In 2016, in particular, Kate Alonzo contributed an enormous amount of time to this

initiative, by authoring the “ask letter”, overseeing its printing and organizing the mailing.

Kate’s role in organizing the St. Nicholas Appeal is reflective of the unusual commitment of a number of Board members and volunteers in carrying out in essence a number of staff functions. For many years, the agency has been blessed with a cadre of volunteers who served as front desk receptionists under the supervision of Jessica Pierce. In particular, Kate Alonzo and Tony D’Imperio served loyally in this role, leading to their election as board members. Over the past several months, Nita Genova has been of invaluable assistance in helping the agency get a handle on the Raiser’s Edge software, as well as having extraordinary success in gaining sponsorship for the Christmas Gala. As indicated above, Carol Bauman continued her volunteer grant-writing achieving success with the Porticus Foundation, Home Instead Foundation and Finebloom Foundation. Over the last two years, Paul Maginn , recently elected to the Board, took over on a volunteer basis the significant task of scheduling transportation for the Faith in Action program. Deb Farberman has often been at the agency, giving counsel and support to Tabitha and performing other functions as necessary. Truly, this Board has been unique in its “hands-on” contributions to the agency.

3. Staff Leadership

A major reason for the agency’s achieving stability and then have opportunity for growth has been the outstanding leadership provided by Tabitha Brewster, appointed Executive Director effective July 1, 2013. Tabitha, a Canaseraga native, who had achieved a Bachelor’s Degree and was working towards a doctoral degree in organizational psychology from Walden University, first joined the agency in 2007 as Director of the Budget Management program. She had been named Associate Executive Director by Carlos Garcia in December, 2010. She continued in this role when Jack Balinsky was serving as Interim Executive Director from October 2011 until June 30, 2013.

In her role as Executive Director throughout this time period, Tabitha effectively collaborated with the Board in the many initiatives described in the previous section, significantly improved relationship with County government leading to new program grants, and provided the necessary leadership to develop a stable, collaborative staff.

Before describing her work with staff at the agency, it is important to mention also Tabitha’s significant contribution to the Diocesan Catholic Charities family. From her early involvement, she has always been sensitive to and contributing to the needs of the larger organization. In 2016, she made major contributions to Diocesan Catholic Charities in two important ways. As a volunteer, she took the leadership role in developing for submission in January, 2016, and then again in September, 2016, a multi-agency proposal of \$750,000 for funding from the New York State Not-for-Profit Infrastructure Grant program for replacements and enhancements to roofs at six agencies. Not only was this a major accomplishment in and of itself, but through her work she identified several ways in which the centralized agency could function more effectively. Her second

major contribution relates to the Medicaid Home and Community-based services waiver, described more fully below. As Catholic Charities of Livingston County was about to enter the “Brave New World” of Medicaid service programs through the HCBS program, Tabitha took it upon herself to participate in numerous conference training sessions and webinars to learn about the program and Medicaid service provision more generally. She has become our in-house expert on HCBS and willingly shared her knowledge with others in the Catholic Charities family.

Tabitha has an extraordinary gift for working with staff, addressing issues requiring flexibility, and building a solid sense of team work. This ability has manifested itself in the quality of staff she has attracted and the stability of their presence and performance.

This stability is shown in staff configuration in programs from the beginning of this time period in 2014 to the present as listed below:

Program	2014	2016
Emergency Housing		Carrie Lyons
SSI/SSD	Heather Wagner	Heather Wagner
Employment	Amy Patterson/Nicole Ricker	Amy Patterson, Nicole Ricker
HOPE	Stuart Atkins	Stuart Atkins, Brandy Swain
Faith in Action	Jessica Pierce	Jessica Pierce
Help*Works	Tammy Hall	Jessica Pierce, Jacob Studios
TASA	Carrie Lyons	Program Discontinued
Mentor Moms	Michelle Dourie	Program Consolidated
Community of Caring	Michelle Dourie	Michelle Dourie
Food Pantry and Clothing Cupboard	Amy Patterson	Amy Patterson
Mobile Food Pantry	Amy Patterson	Amy Patterson
Jail Transitional Services		Tammy Hall, Brandy Swain
Parenting Education	Kristi Birchenough	Carrie Lyons
Individual and Family Therapy		Michelle Dourie, Brandy Swain

Catholic Charities of Livingston County has been blessed by this outstanding staff.

4. Direct Services

a. Introduction

Direct service provision by the agency in this time period is described as follows:

- Overview of Service Programs
- Individual Program Developments
- The “Brave New World” of Medicaid – Home and Community-Based Waiver program and Children’s Health Homes
- Evolving Philosophy of Service Provision

b. Overview of Service Programs

As recorded in the 2013 Diocesan Catholic Charities Annual Report, highlights of services provided in 2013 were:

- A total of 8,910 clients served
- Help*Works helped nearly 3,000 individuals with budgeting, rent, security deposits, utility payments, food, clothing, back-to-school needs and more
- Through the Teenage Service Act program (TASA), assisting Medicaid eligible women 21 and under with pregnancy and poverty, 35 clients received case management services, 11 gave birth to healthy babies, 3 individuals received a General Education diploma and 2 graduated from high school
- Through the Employment Program, 110 individuals received jobs
- The Hope Youth Mentoring program, which matches trained and caring adults with “at-risk” youth, served 45 children
- On average, 120 families were served monthly by the Food Pantry (Clothing Closet)
- Through the Community of Caring and Mentor Mom programs, counselling and support services were provided to 105 women who were parents or soon-to-be parents, as well as those in the Livingston County Jail
- In the SSI/SSD program, there were two approvals and two denials
- The Emergency Housing program served 77 individuals

As recorded in the 2014 Diocesan Catholic Charities Annual Report, services provided by Catholic Charities of Livingston County included:

- Emergency Services (Help*Works)	3,854
- Community of Caring	125
- Faith in Action	133
- Hope Youth Mentoring	58
- SSI/SSD Case Management	33
- TASA (Teen Services)	46
- Emergency Housing	77
- Food Pantry	3,985

For 2015, services provided were:

- Emergency Services (Help*Works)	5,797
- Community of Caring	141
- Mentor Moms	4
- Faith in Action	120
- Hope Youth Mentoring	53
- SSI/SSD	25
- Employment Case Management	227
- Emergency Housing	27
- TASA (Teen Services)	25
- Parenting and Family Therapy	32
- Food Pantry	4,125

For 2016, services provided were:

– Emergency Services (Help*Works)	5,691
– Community of Caring	22
– Faith in Action	114
– Hope Youth Mentoring With 38 on waiting list	26
– SSI/SSD	23
– Employment 229 cases closed, 179 new clients	125 employed
– Emergency Housing Length of stay 30-45 days	16 families
– Food Pantry	4,038
– Transitional Jail Counselling	215
– Parenting Education in Livingston Jail	78

No overview of services would be complete without mentioning the significant role volunteers play in the work of agency in numerous programs but particularly in the Faith in Action, Hope Youth Mentoring and Food Pantry programs. In 2015, 184 volunteers were involved. Eighty-two attended a September recognition event at Camp Stella Maris.

c. Individual Program Developments

Significant developments in the individual programs during this time period included:

Emergency Housing

This program continued to offer apartment opportunities in Mount Morris and Dansville. In 2015, Carrie Lyons replaced Kristi Birchenough as program coordinator. Each year approximately 20 families are helped.

SSI/SSD

Throughout the time period, Heather Wagner effectively administered this program. Through the SOAR (Social Security and Outreach Recovery), 99% of applicants were approved in 2015. Six persons were qualified in 120 days. In 2016, there were four approvals, 3 denials, 5 decisions still pending and 17 in the appeals stage.

Employment Program

The Employment Services program was launched beginning in 2013 through Tabitha's ability to obtain a new contract from the county for a staff position. A second staff position was added in 2014. Staff veterans Amy Patterson and Nicole Ricker assumed these new responsibilities. From the outset, the program was an enormous success. In 2013, 70 of 140 participants became employed. In 2014, 105 persons were employed out of 270 participants. In 2016, 125 persons were employed out of 283 participants.

HOPE Youth Mentoring

Stuart Atkins coordinated this program throughout the time period. In 2016, when he accepted another position and reduced his hours at Catholic Charities, he was assisted by new hire Brandy Swain, who had previously interned at the agency. In 2013, the Big Brothers/Big Sisters program was folded into HOPE. Each year about 50 young people were mentored, and there continued to be significant waiting lists.

Faith in Action

This program, through which volunteers provide transportation for seniors to medical appointments and shopping, was coordinated by Jessica Pierce. As indicated above, in the last eighteen months, she received invaluable administrative assistance from volunteer Paul Maginn. Many of the agency's 184 volunteers worked in this program. The program was assisted by a Home Instead Foundation grant successfully achieved through the grant-writing work of Carol Borman. In 2013, the similar Red Cross transportation program was folded into Faith in Action.

Help*Works

Initiated in 1991 by Sr. Nancy O'Brien as the Rural Outreach program of Catholic Family Center, and renamed in 2007 as the Help*Works program, this emergency assistance initiative continued over this time period to be the heart and soul of Catholic Charities of Livingston County. Until early 2016 when Jessica Pierce took the reins, it was ably administered by veteran staff member Tammy Hall. Basic funding from the program came from Community Services Block Grant funds. In 2012, through the generous commitment of volunteer Bill Lissow, the furniture program was reinstated as a component of Help*Works. As an additional funding source, Joe Dimino had initiated the concept of Eat for Heat dinners, fund-raising events held by faith communities to augment funding. On January 24, 2015, St. Matthew's, as the most faithful partner parish, sponsored its 10th annual Eat for Heat dinner. Recall that in February, 2014, Bishop Matano had directed that a second collection be taken in parishes to raise funds for heating assistance to be distributed by Catholic Charities. This additional funding was most helpful in the winter of 2014-2015. Beginning in 2016, the agency had to reallocate staff funding patterns because CSGB funding was required to be allocated primarily to emergency assistance and thus there was less for staff salaries. Nonetheless, Help*Works remains a foundational program of the agency.

TeenAgeServiceAct (TASA)

Carrie Lyons coordinated the program from 2013 - 2015 until service provision was transferred back to county government.

Mentor Moms/Community of Caring

The Community of Caring program, along with the Help*Works program, was in place as an outreach effort of Catholic Family Center when Catholic Charities of Livingston County was established in 1995. The Mentor Moms program was established later as a related add-on. The programs had gone through a period of uncertainty when funding for the New York State Maternity and Early Childhood Foundation had been discontinued, and the agency also lost a member item grant from the State legislature. Happily, Maternity and Early Childhood Foundation funding had been restored in 2012, and the program was reinvigorated under the leadership of Michelle Dourie. The Mentor Moms program was discontinued as Michelle began to spend time with women incarcerated in the Livingston County jail, helping them with parenting skills and preparing for re-entry upon release. In 2015, the program was given a boost through an additional grant from the County Office of Mental Health to provide parenting education to females with children four years and older.

Food Pantry

The Food Pantry is open two days a week under the leadership of Amy Patterson, with significant volunteer assistance under the leadership of Margaret Nichols. In 2014, the program was relocated from St. Patrick's basement in Mount Morris, where it had been moved two years earlier as a cost-saving measure to a rented facility that was much more convenient. In summer 2015, the Mobile Food Pantry which had become an integral part of the program made its eleventh visit to Mount Morris. In 2016, the Mobile Food Pantry was held five times, distributing food to 411 families.

Parenting Education and Counselling

Through a new grant from the Office of Mental Health in late 2015, this program became a new agency initiative. Its purposes were to provide parenting education, counselling and supportive services to families referred by the County. In early 2016, the agency received a related grant to coordinate SPOA (Single Point of Access) services and to provide assessments of family strengths and needs. Michelle Dourie, with assistance from Brandy Swain beginning in 2016, coordinated this service.

Transitional Jail Counselling

In early 2016, the agency received a grant to establish another new program, Transitional Jail Counselling. Through the program, a counsellor was to provide services to those in jail four hours a day, five days a week, with a focus on outcomes to help re-entry and prevent recidivism. Tammy Hall assumed leadership for this program transferring from her long-time role as Coordinator of the Help*Works program.

d. The “Brave New World” of Medicaid - Home and Community-Based Services and Children’s Health Homes

Catholic Charities of Livingston County was designated by New York State to be a designated provider of HCBS Service on December 31, 2015 to begin the latter part of 2016. Home and Community Based Services for adults are programs that CCLC will offer to individuals in Livingston County who meet the basic criteria of (a) mental illness and/or substance use disorder (b) chronic illness. Implementation of HCBS will help to create an environment where managed care plans, service providers, plan members, families, and government partner to help members prevent and manage chronic health conditions and recover from serious mental illness and substance use disorders.

The following are core principles of HCBS services:

- a. Person-center care
- b. Recovery oriented
- c. Integrated Care
- d. Data driven
- e. Evidence based
- f. Trauma informed Care
- g. Peer supported
- h. Culturally competent services
- i. Flexible and mobile
- j. Inclusive of social network
- k. Coordination and collaboration

For this program, CCLC bills Managed Care Organizations (United Healthcare, Excellus, Fidelis, and MVP) for reimbursement of services.

The following services are provided:

- a. Community Psychiatric and Supports
- b. Psychosocial Rehabilitation
- c. Habilitation Services
- d. Family Support and Training
- e. Empowerment Services
- f. Prevocational Services
- g. Intensive Supported Employment
- h. Education Support Services
- i. Peer Support Services
- j. Ongoing Supportive Employment

In addition to Home and Community Based Services for adults, CCLC will begin to offer **Health Home services to children**. Health Homes is a Medicaid waiver service that will provide children with comprehensive care management. The key principles of Health Homes serving children include:

- a. Integrate physical and behavioral health care that recognizes the unique needs of children and their families

- b. Provide care coordination and planning that is family and youth driven, supports a system of care that builds upon the strengths of the child and family/caregiver
- c. Ensure continuity of care and comprehensive transitional care from service to service and across systems such as foster care, education, juvenile justice and child to adult
- d. Track clinical and functional outcomes using standardized tools that have been validated for screening and assessing children
- e. Adopt child-specific and nationally recognized measures to monitor quality and outcomes
- f. Ensure smooth transition from current care management programs to Health Homes, including transition plan for care management payments

e. **Evolving Philosophy of Service Provision**

The creation of the Parent Education and Counselling Program, funded by two different grants, the advent of the Transitional Jail Counselling program, and in the initiation of the HCBS and Children’s Health Home program led agency leadership to rethink its overall approach to service delivery in the first part of 2016. From its inception, the agency had served almost entirely individuals and families who walked into the main office or came to the food pantry. While there was continuity and continuing relationship with some clients, such as the Community of Caring, Faith in Action and Hope Youth Mentoring program, staff was generally frustrated by not being able to build long-term relationships to move more clients to self-sufficiency and stable lives. The need for this kind of approach was more clear by the new program initiatives and recognition that more clients were the “hard to reach” population requiring more visits and work in the community. Therefore, in what was a major change in service philosophy, in summer 2016, the decision was made to reduce walk-in hours at the agency to two days a week (supplemented by the continuation of two days a week at the food pantry), so staff would spend more time working with individuals and families in the community. Through this changed approach, the agency is much more prepared for thriving in the rapidly changing service delivery environment.

5. **Advocacy and Parish Social Ministry**

Because of its size and lack of funding, Catholic Charities of Livingston County has not had as many staff resources available to carry out those components of the agency’s mission as have other Catholic Charities entities. As recorded in previous works, Mabel Treadwell ably carried out this role on a volunteer basis for the first seven years of the agency’s existence. Beginning in 2002, the agency hired a “justice and peace” coordinator, a role filled successively until 2012 by Ruth Marchetti, Bridget Hurley and Jack Balinsky.

In 2012, there was established for the first time an Advocacy and Parish Social Ministry committee, comprised of one representative from each of the parish communities in the County, staffed first by Jack Balinsky, then by Tabitha and

Tammy Hall. Sister Karen Dietz, parish administrator at the Avon parish cluster, took over as Chairperson of the Committee in 2014 and served until she was elected to a leadership position in her religious community in July 2015, when she was replaced as Chairperson by Deacon John Hoffman from St. Matthew's, Livonia.

Through the work of the committee, the agency made several important steps focused in the areas of advocacy and parish social ministry over the last three years. Accomplishments included:

- Developing more effective collaboration in providing emergency assistance (particularly through the leadership of Sister Karen)
- Meeting regularly with legislators representing the County – Senator Cathy Young and the late Assemblyman Bill Nojay
- Organized by Mabel, presenting an education session on Faithful Citizenship
- Achieving for the first time participation of County parishes in Operation Rice Bowl
- Participating in the annual Diocesan Public Policy Committee petition effort
- Sharing with one another best practice models of parish social ministry committees

This work will continue to be an important agency priority.

F. CATHOLIC CHARITIES OF CHEMUNG/SCHUYLER COUNTIES

1. Introduction

Having undergone a period of transition in the previous five years in which the agency faced several challenges, this time period for the agency was first a time of stabilization, but then beginning in 2014 a time of program growth. Several key long-time Board leaders facilitated the stabilization process. While there was change in leadership at the Executive Director position, several other top leaders were also instrumental in the stabilization process. Despite significant loss of funding from one major source in 2015, the agency's programs continued to provide important services. In 2016, the addition of the Elmira Community Kitchen and the expansion of Medicaid initiatives were important steps forward. Through its remarkable justice and peace staff, the agency continued to prioritize advocacy and parish social ministry activities.

2. Board Leadership

The contributions to the agency of Marie Finnerty cannot be understated. A retired school teacher, she was elected as the agency's third Board Chairperson in 2006 and served in that role until the end of 2013. With the support of the Board members, she oversaw the transition in leadership in the Executive Director position, and with the new Executive, established the beginning of the "settling down" process in 2013. A devoted supporter of Catholic Charities, Marie returned to the Board in 2015, joining also the Special Gifts Committee as she continued to play an important part in the agency's fund-raising efforts.

Marie was succeeded as Chairperson effective January 1, 2014 by retired dentist Mark Schuller, a long-time Board member who was also active on the Board's Human Resources Committee. Throughout his tenure, which concluded December 31, 2016, he helped continue the stabilization process at the agency through his support of the Executive Director. He indicated his desire to continue serving on the Facilities and HR Committee. Greg Stewart was elected as his successor and would take office effective January 1, 2017.

Other Board members who served as officers were instrumental in the progress made by the agency during this time period. Ron Allison, retired Chemung Canal Trust Executive, served a Vice-Chairperson during this time period and also followed Marie Finnerty as the agency's representative on the Diocesan Board. Gordy Schuler, a CPA with Mengel Metzger Barr and Co. served on the Board from 2004-2015, serving as Treasurer for much of that time. After rotating off the Board, he also wanted to serve as a member of the Finance and Facilities Committees. Dick Prozzolio served several years as Secretary before rotating off the Board in 2012, and was instrumental in procuring larger gifts for the agency. The agency and the community suffered a great loss with the passing in 2015 of Smitty (Smith Paulson). For his long years of service, including succeeding Dick as Secretary, the agency then established an Honorary Life Member Board Committee with Smith Paulson as the first recipient of the Life Time Achievement Award. Armand Fusco, retired business manager of St. Mary and Martha who replaced Smitty Paulson as Secretary, also served as Chairperson of the Facilities Committee.

Other Board members also played leadership roles. Long-time Board member Rev. Dr. Betsey Crimmins, pastor of First Presbyterian Church, chaired the Strategic Planning Committee, which oversaw the development of the 2016-2020 Strategic Plan described below. John Carozza a retired Corning dentist, chaired the Schuyler County Advisory Committee, helping revitalize its work, and also joined the newly created Special Gifts Advisory Committee. David Ralph, an attorney with New York Law, who joined the Board in 2009, chaired the Program Advisory Committee and was also a member of the Strategic Planning Committee, as were Board members Greg Stewart, Paul Santori, and Bruce Boughton. Loyal Board member Carol Cavalier, a retired computer programmer, who joined the Board in 2011, was a supporter in numerous initiatives.

Two major responsibilities of not-for-profit Boards, in addition to working with and supporting the Executive Director, are strategic planning and fund-raising. During this time period the Board of Catholic Charities of Chemung/Schuyler Counties was active in both areas.

The first step in the Strategic Planning process was the adoption of a mission statement in August 2015:

Inspired by the Gospel and Catholic Social Teaching, our mission is to help fulfill Catholic Charities of the Diocese of Rochester's commitment to build a just and compassionate society rooted in the dignity of all people by reducing poverty,

promoting healthy individual and family life, collaborating with faith communities and advocating for justice and peace.

We are committed to serving all individuals in need – regardless of racial, ethnic, cultural or religious origins, ability to pay, or mental, physical or developmental challenges.

The 2016-2020 Strategic Plan identified four priorities:

- Sustain and grow financial resources
- Strengthen brand
- Assure appropriate staffing and compensation
- Strengthen bonds with Catholic parishes and faith communities of other denominations

Activities undertaken in the last year to implement the strategic plan have included:

- Adding a Grants/Planner and Medicaid Project Coordinator (to expand resources)
- Developing a stronger fundraising effort
- Carrying out a wage study
- Discussion about developing a sustainability entrepreneurial initiative
- Initiation of new Medicaid services

With regards to fund-raising, while a majority of funds raised by the agency come from direct mailing initiatives, the Board has played a leadership role in organizing two major annual events. The Chemung Gala, initiated in 2012, held annually in May at the Chemung Country Club averaged \$25,000 in net proceeds. The Schuyler Soiree, initiated in 2013, held annually in January at Ledyard Winery, averaged \$20,000 in proceeds.

During this time period, the agency benefitted from other sources of funding. The agency has been blessed with receipt annually from an anonymous donor of gifts ranging between \$50,000 and \$100,000. In 2016, the agency received a major bequest from the estate of Dick Wardell and Carl Parmelee. Parishes provided significant financial support to the shelter program and to the Elmira Community Kitchen. As indicated above, in 2015, the Board established a Special Gifts Advisory Committee to identify new potential donors and strengthen relationships with current donors.

Total amounts of gifts/fund-raising dollars received during this time period were:

2013	\$332,567
2014	\$428,296
2015	\$406,606
2016	\$706,823

Beyond its work on strategic planning and fund-raising, the Board continues to work effectively through several committees:

- Schuyler Advisory Committee
- Finance

- Human Resources
- Facilities
- Special Gifts

The Board also planned to create a Mission Effectiveness Committee in 2017.

3. **Staff Leadership**

Following the departure of Bridget Steed in 2012, Tony Barbaro served as Interim Executive Director until May 31, 2013. Chuck Nocera, who had been serving as Associate Director since early 2012, was appointed Executive Director on June 1, 2013. It was Chuck's leadership with able support from Tony Barbaro in his role as Associate Diocesan Director which made possible the stabilization and ultimate growth described here.

Chuck received his B.A. in Social Psychiatry in 1975 from Niagara Falls Community College, where he was an accomplished baseball player. He spent four years in the 1980's working toward a Ph.D at Cornell in Evaluative Research before deciding to pursue other interests. He then served ably for eighteen years as Executive Director of the Red Cross in Ithaca. After a brief stint in 2010 at Residential Services at the YMCA in Binghamton, he joined Catholic Charities in 2011. After a successful stint as Director of Residential Services, he was appointed Associate Executive Director in 2012. These experiences in totality prepared him well for the leadership position he has filled throughout this time period.

An able administrator is able to maintain, promote and attract qualified top level staff. Chuck has done that at Catholic Charities.

Ellen Topping was hired in 1999 as a case manager in the Gateways program. An accomplished mental health professional, she was promoted to a supervisory position and then became Director of Residential Services for the agency. Chuck promoted her to the position of Associate Director in 2014.

Another outstanding staff person who rose through the ranks at the agency was Mary Canali, a joint owner of Palms Restaurant with her husband, and who also had earned an M.B.A. from St. Bonaventure, she was first hired as a receptionist. She then was promoted to Executive Assistant to the Executive Director and in early 2014 was also made Business Manager along with her role as Executive Assistant.

In late 2012, Debra MacDonald became the fourth Director of the agency's office in Schuyler County (following Sarah Conley, Mike Gehl and Paul Marx). She came to this job from her previous position with the Children's Council. Not only has she responsibility for administering the agency's programs, but also during this time period she worked closely with Chuck in seeking to identify a new permanent office location for Schuyler County activities.

Lindsay Winters has now served as the agency's Development Director for ten years. She has not only been responsible for planning for both the Chemung

Gala and Schuyler Soiree but has staffed the Special Gifts Committee, overseen the planned giving initiative, and been primarily responsible for the agency's public relations and marketing efforts, including production of the Annual Report.

Now, for thirty-four years Kathy Dubel has been a treasure to the agency, to Catholic Charities of the Diocese and the Diocesan staff. Hired in 1982 as Justice and Peace Coordinator for the recently created office in Elmira, Kathy has been the "heart and soul" of the agency in carrying out its mission. In 2008, she received the coveted Vinnie DeFazio Award for her contributions to the State Council of Catholic Charities. While her advocacy and parish social ministry activities and her work as Diocesan Director of Catholic Relief Services are described below, mention must be made here of one direct service program which she initiated in 1994: the First Time Homebuyer. Over the past twenty plus years, more than 430 families have benefitted from this program, enjoying the privilege of home ownership. (Program Director Jane Sokolowski was named in 2012 as HUD Counsellor of the Year in recognition of the outstanding success of the program.

Three other long-time employees who have run the "nuts and bolts" of program operations deserve mention here: Marty McNerny has been Property Manager since 2003. Terry Gursky has served as Compliance Officer for OMH licensed programs since 2005. Susan Fritz has served as Director of Homelessness Emergency Services for the last ten years.

In 2016, the Board made the decision to create two new positions: Special Projects Coordinator and Grant Administrator.

Taken together, the competent, committed staff of the agency have made possible the delivery of services described below.

4. Direct Services

a. Introduction

As of July 1, 2013, major services offered in Chemung County were the Samaritan Center which both provided emergency assistance and oversaw homelessness services, including a five year Solutions to End Homelessness Program (STEHP) which enhanced the shelter and permanent housing services described below and the Gateways program which offered residential services under HUD for homeless, OMH and OCFS for foster care. At that time, offered in Schuyler County were the Food Pantry, services for victims of Domestic Violence, Housing services through a grant for transitional and permanent housing and the RSVP program for which the agency assumed administrative responsibility in early 2013.

In fall, 2014, Catholic Charities was designated as lead agency by the five county Continuum of Care organization for which it had been providing Homeless Management Information System (HMIS) services for several years and held 7 contracts totaling almost \$900,000. That program was jeopardized in the fall of 2015 when the funding application submitted by a

partner agency was not submitted in timely and accurate fashion. Agency leadership was adroitly able to make program adjustments and find other funding services to keep the program operating. Full funding was restored in the fall of 2016. The other major new initiative undertaken during this time period was the assumption of administrative responsibility for the Elmira Community Kitchen. Also in 2016, the agency began preparing for providing Health Home Care Management for adults and children as well as Home and County-Based Waiver Services through two start-up grants from OMH.

b. Chemung County Services

The Gateways program offered the following services, with capacities shown for 2013 and 2016:

	2013	2016
Community Residence	14	14
SILP	8	12
Miller Manor	12	12
Shelter Plus Care	25	25
Supportive Housing	95	89
Treatment Apartments	36	36

Through these services, the number of individuals and families who were provided housing and residential services were:

2013	425
2014	402
2015	459
2016	

In 2016, through the STEPH program, the following services were provided:

Program	People Served	Households Served	Number of Services
STEHP Essential Services	31	32	34
STEHP Prevention	361	161	1,167
STEHP Rapid Re-Housing	69	37	225
Unduplicated Tool	456	229	1,426

Through the SILP foster care program, an average of 21 youth annually were given the guidance of support to become healthy independent adults.

The Samaritan Center provided emergency food, financial assistance and prescription assistance as follows:

	2013	2014	2015	2016
Emergency Assistance	5,606	6,391	5,527	5,135
Prescription Assistance	173	55	470	9

Through Second Place East and Samaritan Center, the number of children and youth who were provided with emergency shelter, and received meals and support on their journey toward permanent housing were:

2013	316 individuals and children
2014	363 individuals and children
2015	392 individuals and children
2016	415 individuals and children

As indicated also in February 2016, Catholic Charities assumed responsibility for administering the Elmira Community Kitchen which had been established by Blessed Sacrament Parish over thirty years previously with great assistance and support provided by Kathy Dubel. The program is located at the parish hall five days a week, providing 25,109 meals annually through the support of 250 volunteers organized into twenty four teams.

By the end of 2016, over 442 homes had been purchased by the First Time Homebuyers Program operated in partnership with the City of Elmira. In addition, in 2014, 224 individuals were provided mortgage closure and prevention (annually), 145 individuals were assisted in this way in 2015, and 120 in 2016.

c. Schuyler County Services

In this time period, the Schuyler County office offered three major programs after the expiration of the previously described grant awarded for transitional and permanent housing in 2011.

The agency’s original program continued to provide support to advocacy for victims of domestic violence, serving 80 victims in 2013, 116 victims in 2014, 195 victims in 2015 and 242 victims in 2016.

Through the Schuyler Outreach Food Pantry, average number of households served monthly were:

2013	361
2014	331
2015	252
2016	256

Even though the RSVP program of Schuyler and Yates Counties sustained a 25% cutback in funding during this time period, many individuals continued to donate volunteer time to help clients in need providing services ranging from food preparation to reading to transportation.

2013	234 individuals donated 23, 000 hours
2014	209 individuals donated 22,889 hours
2015	164 individuals donated 16,813 hours
2016	146 individuals donated 14,602 hours

5. Advocacy and Parish Social Ministry

As indicated previously, Kathy Dubel had ably fulfilled the role of Justice and Peace Coordinator at the Elmira Office since 1982. With the transition of what had been Catholic Charities of the Southern Tier to four separate entities in 2003,

Kathy served this role for Catholic Charities of Chemung and Schuyler Counties as well as the Catholic Charities office in Tioga County. In addition to carrying out her role as Diocesan Director of Catholic Relief Services as described in the previous volume, “A Brave New World: The Evolution of Diocesan Catholic Charities Activities 2013-2016,” and her role with the Elmira Community Kitchen, Kathy was a spirited and experienced leader in this time period in organizing and carrying out parish social ministry and advocacy activities.

With regard to parish social ministry, Kathy organized and participated in several ongoing regular activities:

- Regularly participating in combined staff meetings of the combined Elmira parishes
- Providing a monthly bulletin article for the parishes
- Convening parish social ministry volunteers for education and training sessions on a bi-monthly basis
- Annually, bringing in speakers for her February “Winter Refresher” and year end June Dinner celebration, often attracting as many as 100 participants
- Arranging meetings as appropriate between parishioners and legislators
- Successfully engaged parish participation in the Friends of St. Francis Pledge

With regard to advocacy activities, Kathy was pro-active in a number of ways:

- Fully participating in the activities of the Diocesan Public Policy Committee as described in “A Brave New World,” especially with a focus during this time frame on developing with a sub-committee education materials on Laudato Si: Care of Our Common Home, both around the Feast of St. Francis in October and for the Easter-Pentecost time frame
- Recruiting new members Dick Bierl and Deacon Tom Ruda for the Public Policy Committee
- Organizing annual summer meetings with Senator O’Mara and Assemblyman Friend
- Organizing meetings as appropriate with Congressman Reed
- Submitting comments on the development of the State’s energy policy
- Promoting the work of the national organization, Catholics for Global Climate Change
- Promoting Fair Trade coffee and other products
- Playing a leading role in local interfaith advocacy coalitions, including Every Child Matters, Health Matters and the Chemung County Housing Coalition

In all these ways, Kathy has continued to help Catholic Charities of Chemung/Schuyler Counties carry out the mission statement adopted nationally in 1972.

G. CATHOLIC CHARITIES OF STEUBEN

1. Introduction

This time period for Catholic Charities of Steuben was a time of stabilization of program functioning, attention to the agency's branding and community visibility, and enhanced fund-raising efforts. Several long-term Board members continued to provide outstanding leadership. Stability and excellence in leadership staff provided a solid foundation for the agency's programs. Existing programs thrived, and the agency intensified both its focus on existing programs and ventured more deeply into the "Brave New World" of Medicaid reform. The agency continued its emphasis on advocacy in coordination with the Diocesan Public Policy Committee, particularly in relationship to issues of poverty faced by individuals and families.

2. Board Leadership

Throughout this time period Board Chairperson Mike Gabrielli continued his outstanding leadership, personifying a response to the Gospel message to love our neighbor and the mission of Catholic Charities, which is:

"To build community trust that cares for all people by strengthening and enriching the quality of life for individuals, families and children, working to reduce poverty and advocating for social justice, which helps fulfill Catholic Charities of the Diocese of Rochester's commitment to build a just and compassionate society rooted in the dignity of all people."

Mike's support of the agency was tireless, not only leading Board activities and serving as the Steuben County Catholic Charities representative on the Diocesan Board, but also volunteering on a regular basis in support of programs by being physically present, using his truck, known fondly as the agency's vehicle, to transport goods and donations, and helping with physical repair needs. In addition, as described below, as a retired Corning executive, in coordination with the likes of Gary Pease, Vince Hatton, Tom Trantor and Tony Trippany, organizing the annual Corning Breakfast.

Mercedes Blake, another retired Corning executive, took leadership in early 2014 in creating a revitalized Board committee which implemented a much more robust public relations initiative for the agency. Cathy Crandall completed her third three year term as Board member, serving as Treasurer and closely and effectively overseeing the agency's financials. She was replaced in 2015 by Ross Bell. Bob Gilchrist, who was instrumental in putting the Day Care program on solid footing, also continued his generous support of the agency. Pat Rogers, Director of the Institute for Human Services and Board member, oversaw the Strategic Planning Process, a role assumed by Mike McDonald in 2016 and Jon Chester in 2017. Two members of the family, Mike McDonald and Andy Mazzella served on the Board, left briefly (Mike-term limits, Andy to serve as staff) and then returned. Among many other contributions, Mike applied Six Sigma principles to the Legacy of Hope program and provided leadership staff with Six Sigma Green Belt training. Andy, who had previously initiated many of the agency's fund-raising initiatives, returned to the Board in 2014 and continued

to energize its efforts. Father Lew Brown had previously joined the Board and was helpful at increasing connectedness with the Catholic community.

Throughout this period, the Kinship Advisory Committee, consisting of Dan Wensel, Sarah Heineman, Christopher Quinlan, Mike Gabrielli, Gina Reagan, Pat Monahan, and Bob Gilchrist, oversaw the continuing integration of Kinship programs into the agency’s activities.

Space does not permit mention of all Board members, but as a whole the Board remained committed and cohesive.

In addition to its most important role of supporting and working with Executive Director, the Board ably carried out other responsibilities of a not-for-profit Board’s strategic planning, branding, communications, fund raising (including Annual Dinner) and attention to facilities.

The Strategic Plan for the period 2014 through 2016, developed under the leadership of Pat Rogers, emphasized the core values of respect, dignity, compassion, hospitality, excellence and stewardship. A major decision was to eliminate the position of Chief Operating Officer and add positions in fund-raising and direct services.

In 2014 and 2015, the agency completed a three phase Co-Branding Project: Phase I – Service Line Operation Plan Development; Phase II – Brand ID Framing Development including “Corporate Identity”; and Phase III – Toolkit Needs and Implementation. This effort resulted in establishment of three “service priorities” for Catholic Charities – Substance Free Living, Turning Point and Kinship Family and Youth.

During this time period, much was done under the leadership of Mercedes Blake through the Communications Committee to enhance the visibility of the agency. In 2013, there was developed an agency website combining Kinship Family and Youth Service with Steuben Catholic Charities. Under new Fundraising and Communications Director Paula Smith, hired in February 2013, extensive work was done tying branding to the agency’s fund-raising activities with increased self-publicity efforts, including utilizing Facebook accounts and other methodology. In 2013, annual spring and winter newsletters were initiated. In 2014, new agency brochures were developed. In 2016, a part-time communications assistant was hired.

These enhanced communities efforts resulted in substantial increases in the agency fund-raising results. For the various initiative, results by year were

	2013	2014	2015	2016
General Fundraiser	\$ 11,628.01	\$ 13,639.90	\$ 12,453.58	\$ 9,770.12
40 Week Club	\$ 9,635.00	\$ 14,101.00	\$ 14,070.00	\$ -
Summer Appeal/ Poverty Walk	\$ 15,693.00	\$ 19,858.00	\$ 33,043.43	\$ 38,167.05
Golf Tournament / Wine Tasting		\$ 10,466.00	\$ 16,093.00	\$ 20,412.84

Annual Appeal	\$ 99,015.61	\$ 107,426.47	\$ 139,827.38	\$ 178,944.33
Christmas Appeal	\$ 62,459.16	\$ 72,792.63	\$ 54,179.00	\$ 50,210.39
Total Fundraising	\$ 198,430.78	\$ 238,284.00	\$ 269,666.39	\$ 297,504.73
Donations	\$ 126,617.47	\$ 204,675.36	\$ 170,125.98	\$ 199,509.27
Church Contributions	\$ 53,804.75	\$ 50,657.20	\$ 46,720.63	\$ 41,962.00
Total Donations & Fundraising	\$ 378,853.00	\$ 493,616.56	\$ 486,513.00	\$ 538,976.00

The Board also hosted throughout this period the October Annual Dinner at which awards for outstanding commitment to the agency, its mission and programs were presented.

As the agency evolved, by this time frame, the following awards were presented:

- The **Friends of Catholic Charities Award** is the highest honor awarded by the agency, given commonly to an individual or organization that helps Catholic Charities achieve its mission.
- The **Spirit of Turning Point Award** is given to an individual or organization whose contribution helps to advance the agency’s work to reduce poverty in the community.
- The **Golden Shoe Award** is given annually to the individual who raises the most money in the Steps To End Poverty in Steuben (STEPS) walk.
- The **William and Dorothy Belknap Award** recognizes an individual who has helped to promote the Bath Hope for Youth program.
- The **Barbara Fairbanks Kinship Family and Youth Service Award** is given annually to an individual who truly believes in the vision of strengthening families and giving hope to children.
- The **Therapeutic Foster Care Program Award** is given annually to a foster parent or parents who exemplify the qualities necessary to build a child’s esteem, positive behavioral skills and confidence.
- The **Works of Love Award** is given annually to a member of the community who collaborates with Catholic Charities to act on social justice issues and serve the most vulnerable members of the community.
- The **Robert Turissini Award for Extraordinary Service** honors outstanding employees who demonstrate the spirit of the founding Board Chairperson.
- The **Andy Mazzella Compassion Award** established in 2014 rewards individuals who have given selflessly of themselves to improve the human condition of others.

Winners of these awards during the time period were:

AWARD	2013	2014	2015	2016
Friends	Mike Gabrielli	Pro-Action Steuben & Yates	Thomas Jack	United Way of the Southern Tier
Turning Point	Betty Hess	Betty Langendorfer	Chloe Makarick	Cornell Cooperative Extension of Steuben County
Golden Shoe	Andy	Andy Mazzella	Betty Hess	Kacey Blaney

	Mazzella			
Belknap	Beverly Butts	Mary White	Addison Youth Center & Staff	Tim Lyons
Fairbanks	JoAnn Clough	Bob Gilchrist	Milly's Corner	Read to Me Steuben
Foster Care	Myra & Rick Graham	Becky & Bob Fanton		
Works of Love	Mary & Bob Dunham	Steuben County Bridges Out of Poverty Coalition	Kacey Blaney	Francis Curran
Turissini	Jim Bassage	Margaret Duff and Lynda Lowin	Quay Wells	Jamie Fuller
Mazzella		Paula Stark	Michelle Schaffer	Sr. Susan Cain

Throughout this time period the Board also oversaw significant improvements to its main office physical facility in Bath. In 2012 the food pantry floor was replaced. In addition, that year the building was removed from the tax rolls. In spring 2015, the second floor was renovated to increase efficiencies and improve the work environment. Unfortunately, the agency's not-for-profit infrastructure grant application to install an elevator and make third floor renovations was not funded.

In 2016, the agency was able to make significant improvements to its chemical dependency residential facility, dedicated to Joe Weider and renamed Weider Home in September 2015. The roof was replaced and three new furnaces and three new air-conditioning units were installed. Also, the Steuben Rural Ministry facility in Canisteo was upgraded in accordance with the recommendations from a First Niagara safety inspection.

While these were all very positive accomplishments, the agency was frustrated throughout the time period in efforts to relocate the main office for the Kinship program to St. Ann's School in Hornell. When the agency's lease at its most recent location was expiring, Catholic Charities began discussions in 2013 with St. Ann's parish about renovating the school as a new location. With architectural drawings completed in 2014, the project was put out to bid. The costs came in at twice the projected budget. While a contractor did provide a reduced bid, the project remained far above budget. The project was presented to the Diocesan Building Committee who had several questions. An offer by the Diocesan Stewardship and Communications office to organize a capital campaign did not move forward because of the cost issue. Given these difficulties, in 2016 a lease was signed with the new landlord in the existing location, with inclusion of a clause allowing sub-letting of space with landlord approval.

The Board can be very proud of its many accomplishments in this period.

3. Staff Leadership

Throughout this time period, Catholic Charities of Steuben continued to enjoy outstanding staff leadership.

Hired in 1998 as Executive Director, Laura Opelt, continues to be the “Dean” (longest-tenured) of the agency regional directors working for Catholic Charities of the Diocese. Raised in the Hammondsport/Bath area, Laura has made enormous contributions to her native community. After graduating from Keuka College, with a B.S. in Human Services Management, she then worked as Acting Director of Senior Services for Family Services in Corning, served as weekend manager of Arc community residences while attending college, and later became Executive Director of RSVP (1984-1998) serving as President of the NYS Association (1995-1997) and worked with Catholic Charities on a joint project (1997-1998). Since 1998, she has become the face of Catholic Charities in Steuben County and also a recognized voice advocating for the poor. (On numerous occasions, she has received extensive press coverage of her advocacy.) She has been instrumental in making possible the growth of the agency described here and has contributed significantly to Diocesan Catholic Charities. For her paintings, she is also recognized as a significant community artist.

In her entire career at Catholic Charities, Laura has been successful in recruiting, assimilating and leading an effective leadership team. During this time period, the team included long-time staff stalwarts, assimilated staff from Kinship and new leaders.

Melody Johnson, who served as Chief Operating Officer from 2011-2013, and assisted with the integration of Kinship programs in Steuben Catholic Charities.

Several long-term Kinship employees continued their effective service throughout this time. Lisa Galatio, who had been hired at Kinship in 1995, and had begun administering the Healthy Families program in 2000, was named Division Director of Kinship Family and Youth Services in 2014. Kim Robards-Smith, hired by Kinship in 1995 when the community residence program was opened, provided extraordinary leadership to this highly acclaimed program throughout the time period. Margaret Duff who had responsibility for the S.H.A.P.E. program also assumed responsibilities for the Day Care program in 2013. When Margaret retired in 2016, the S.H.A.P.E. and Foster Care Services were combined to the Child Welfare Services unit. Lisa assumed the administrative responsibilities, in many ways assuming the role of Chief Operating Office of the organization. Jamie Fuller who had been hired as Joe Weider’s Business Manager at Kinship in 1992, played a variety of roles after the transition, serving as the quality assurance staff person, and as the point person for Managed Care, among other responsibilities.

Several long-time Steuben Catholic Charities leaders continued in their position throughout this time period. Jim Bassage continued in his role as administrator of prevention programs. Sue Bozman, a tireless and energetic person, hired in 2000, continued her work as Grant Writer and Data Management Director. The

agency (and Laura) were saddened when Diane Marcoux resigned her position as Executive Assistant in 2015. Thankfully, in addition to her other duties, Jamie Fuller stepped into the Administrative Specialist role, on a part time basis, to assist with Board Communication and other Executive functions.

During this time period, the agency also benefitted from the hiring or promotion of several staff leaders. Lynda Lowin, who had been hired as Justice and Peace coordinator in 2006, and stimulated a community collaboration on anti-poverty initiatives, was named full-time Director of Anti-Poverty programs in late 2013. Melissa Nichols Mahany was named Director of the Foster Care program in 2013. The agency was enriched when the Steuben County Rural Ministry program in Canisteo and its leader, Sister Susan Cain, joined the agency in 2014. As previously indicated, Paula Smith joined the agency in 2013 as Fundraising and Communications Director. Together with Andy Mazzella, she created the Legacy of Hope Major giving program and now leads a staff of two and one-half persons.

The discussion of Leadership Staff would not be complete without mention of the extensive work done during the time period with regard to succession planning. While most of our Catholic Charities agencies have a succession plan for the Executive Director position, Steuben Charities engaged in a much more extensive effort. Comprehensive plans brought together in a manual were completed for Board positions, the Executive Director position and several other leadership staff positions. Position requirements, experience required and even potential candidates were identified for each position.

4. Direct Services

a. Introduction

As indicated previously, the organization undertook two intense structural changes in this time period. In late 2013, after the departure of the COO, a new three division structure was initiated. Through the co-branding initiative undertaken in 2014 and 2015, these three divisions were renamed service priorities. Direct services accomplishments are chronicled here according to these service priorities: Substance Free Living, Kinship Family and Youth Services and Turning Point. The final section describes the evolution of Medicaid Managed Care activities in 2016.

b. Substance Free Living

The mission of the Substance Free service priority is to reduce the prevalence of substance abuse and its negative consequences in the community. The two major components of the Substance Free Living service priority are prevention and residential services.

– Prevention

Major elements of the Prevention Program are:

- * Bath Hope Counseling
- * John Southard Youth Recreation
- * Steuben County Drinker Driver Program
- * Steuben Council EBP Youth
- * Steuben Council AP Adults

- * Steuben Council Adult Services
- * Steuben Council Youth Services
- * Steuben Council Community Outreach

Service statistics for this three year time period were:

	2013	2014	2015	2016
Bath Hope Counseling	88	91	77	103
John Southard Youth Recreation	1,136	1,434	1,174	1,229
Steuben Council Drinker/Driver	189	208	188	185
Steuben Council EBP Youth	1,393	1,465	1,130	1,168
Steuben Council AP Adults	136	121	104	158
Steuben Council Adult Services	1,475	1,428	1,050	1,220
Steuben Council Youth Services	2,177	2,221	3,340	3,424
Steuben Council Outreach	34,801	105,555	126,347	114,465

Major program highlights during this time period included:

2013

- Steuben Council on Addictions as the lead agency was successful in receiving a 5 year Federal Drug Free Community Grant in the amount of \$125,000 a year
- The Bath Area Hope for Youth Community Program saw 91% of youth involved in the counselling program showing improvement on discharge
- Overall, grant writing exceeded targets by 133%

2014

- The Steuben Council on Addictions partnered with the Steuben County Sheriff's Department in acquiring \$8,488 for STOP DWI funding
- The Council provided an anti-bullying program at Hammondspport Central Schools, dramatically reducing the number of students reporting having been bullied
- The Steuben Coalition was nominated for a National "Got Outcome Award" and was one of eight programs selected to proceed to the second round of the competition

2015

- In partnership with Arbor Housing and Development programming was extended to the Corning area
- The Steuben County Prevention Coalition conducted the comprehensive Risk and Protective Factor Survey in 11 of the 13 school districts in the last week of October
- On October 28, 2015, the Steuben Prevention Coalition sponsored the Second Annual Youth Action Forum at Haverling High School in Bath

2016

- Drug Free Community held focus groups in eight sessions

- The program was able to secure “STOP DWI” and District Attorney’s “Traffic Initiative” funds to implement several media campaigns throughout the year.
- The evidence-based education program was expanded significantly

Residential Services

The residential component of the Substance Free living Service Priority also experienced outstanding success in this three year period.

This program provides service to adult male individuals in recovery at an 18-bed OASAS licensed **Community Residence** in Bath and an 18-bed **Supportive Living** Program in Bath and Corning.

Program highlights during this time period include:

2013

- The Community Residence assisted 50 residents in the path to recovery and the Supportive Living Program placed 32 graduates
- An unannounced OASAS site review resulted in a high score, a three year operating certificate and a 4.0 in operational management
- The Community Residence had 96.8% occupancy rate, and the Supportive Living program had a 90.9% occupancy rate
- The capacity of the Supportive Living program was expanded from 15 to 20

2014

- The Community Residence received 145 referrals
- The Community Residence Program achieved a 96.2% occupancy rate, while the occupancy rate at the Supportive Living Program was 90%
- Through a collaborative effort with the Veterans Administration, seven veterans were referred to the program
- Five residential staff were working to become NYS Certified Addiction Counselors

2015

- The Community Residence had 155 referrals
- Again, as a result of an unannounced OASAS inspection, the Community Residence was awarded a maximum compliance 3 year operating certificate
- The Community Residence program had a 94.7% occupancy rate
- The Supportive Living Program was restructured and downsized. While the license authorized 18 beds, with the closing of All Saints Rectory in Corning, 12 units were being utilized
- The Community Residence provided residence and counselling to seven veterans
- Three staff became Certified Alcoholism and Substance Abuse Counsellors

- At a twentieth anniversary ceremony held on September 18, 2015, the Community Residence was named Weider House in recognition of long-time Kinship Family and Youth Service Executive Director Joe Weider

2016

- Weider House received 189 referrals
- These programs, like all OASAS treatment programs, began using a “level of care indicator” tool
- The agency implemented the requirements of Medicaid Residential Redesign
- Both programs were again granted three year operating certificates

c. Turning Point

Turning Point alleviates the effects of social injustice by stabilizing families in economic crisis, and supporting them as they strive for self-sufficiency. Turning Point staff work with people experiencing financial crisis offering stabilization and education as a means to turn a corner in their lives. Offering support through a three-part continuum beginning with Basic Needs Assistance, clients avert homelessness, utility shutoff, medicine shortage and hunger. Through Support services, clients access ongoing supports that help stretch earned dollars for short-term stability. Through Development services, clients position themselves for long-term stability by setting goals, accessing opportunities, and gaining knowledge. The Faith Community, Community Organizations, Foundations, and people of good will in Steuben County are partners in building communities that care for all people by strengthening and enriching the quality of life for individuals, families, and children; working to reduce poverty; and advocating for social justice.

Service statistics for this time were as follow:

	2013	2014	2015	2016
Housing Assistance	86	201	239	335
Utility Assistance	245	352	363	278
Transportation	399	373	654	2,070
Food Pantry	4,331	9,477	9,143	8,225
Nutrition Outreach	643	325	380	304
Prescriptions	189	79	69	70
Financial Management	326	337	387	330
Income Tax Preparation	479			

Program highlights included:

2013

- Sister Susan Cain and Steuben County Rural Ministry became a part of the agency
- The Back-to-School Supply Drive provided 570 backpacks to students K-12 in central and western Steuben County
- The Thanksgiving project raised \$9,500 enabling the agency to provide Thanksgiving and Christmas food to 900 families

- Lynda Lowin was named Division Director and created a county-wide Turning Point Advisory Council

2014

- Tess McKinley was hired as Turning Point Site Coordinator in Bath. She had previously worked for Prevention Services (2007-2012). In December of 2016, she was named Assistant Director of Turning Point
- The Back-to-School Supply Drive provided backpacks with school supplies to 568 K-12 students in western and central Steuben County
- Through the Institute for Human Services, Ameri-Corps staff members were added to Turning Point programs in Bath and Hornell
- The tenth annual Bath Area Churches United Against Hunger Progressive Dinner, held in April, raised \$1,600
- The agency partnered with ProAction of Steuben and Yates to organize poverty simulations for several school districts
- 745 households, comprised of over 2,000 individuals, received food for a family style Thanksgiving dinner
- Steuben County Rural Ministry provided family style Christmas meals to 238 households in the Canisteo area

2015

- 480 students received school supply backpacks
- 744 households received food for a family style Thanksgiving dinner
- An additional 932 received food at Christmas
- 313 children received Christmas gifts through Rural Ministry
- Turning Point received 620 pounds of produce from Bath Community Gardens
- To help families keep warm during the winter, 1,000 weatherization hats and 200 winter coats were distributed
- Turning Point became part of the STEPH program administered by the County
- The agency received \$30,000 in FEMA emergency assistance funding
- Fifty-seven residents participated in an education program developed in cooperation with Cornell Cooperative Extension and the Food Bank of the Southern Tier

2016

- Holiday meals were provided to 472 households in Bath, 162 in Hornell, and 133 in Canisteo
- 400 Cold Hands Warm Heart food bags were delivered in Bath
- Turning Point launched a Mobile Service Project in the Corning area in order to expand outreach services and better service targeted low-income sectors/groups
- 579 students received back-to-school backpacks
- Bath Turning Point utilized trained peer specialists from the Weider House Supportive Living Program
- Hornell Turning Point started a laundry assistance program with the help of the Whistle Stop Laundromat
- The position of Assistant Director of Turning Point was created

d. Kinship Family and Youth Services

Kinship Family and Youth Services helps families develop the capacity for healthy family functioning and promotes child development.

Within this service priority are four major programs:

- Healthy Families
- Therapeutic Foster Care
- Supportive Home and Parent Enrichment (SHAPE)
- Bath Community Child Day Care

Healthy Families

Healthy Families offers support and education, through home visiting, to new and expectant parents living in Steuben County. This evidence-based home visiting program makes a difference by improving birth outcomes, preventing child abuse and neglect, promoting success in school, and supporting positive parenting.

For this time period, following is a summary of services provided:

	2013	2014	2015	2016
Families Served	251	220	234	272
Home Visits	3,530	3,130	3,088	3,038
% Father, partner	34%	67%	62%	70%
% with children connected to medical provider	99%	100%	100%	100%
Enter the program prenatally	72%	67%	70%	57%
Primary Parents connected to medical provider	97%	99%	97%	94%
Assessed for risk of lead exposure	93%	100%	100%	100%
Employed	81%	85%	74%	77%
Graduated	32	21	21	36

Program highlights during this time period included:

2013

- The program received the Distinguished Award in Human Services from the Steuben Rural Health Network for their commitment to making a positive impact upon Steuben County families and for the influence of the program’s best practice on rural human services delivery
- The program received a grant from the United Way to provide hearing equipment for testing children as well as “shaken baby dolls” for use in training with families
- The Addison site was located to a better facility

2014

- Heart to Heart provided holiday assistance to 37 families
- The Rochester Diocesan Public Policy Committee chose Healthy Families as a program to highlight advocacy effort to strengthen families

2015

- As one of the programs established in the initial round of funding, the Healthy Families programs celebrated its twentieth anniversary of improving outcomes for children and families in the State
- The program was involved weekly in the Baby Café initiative at the Dormann Library, an initiative which supported breast feeding families
- The program partnered with other agencies to form the Material Child Health Initiative

2016

- The Material Child Health initiative, designed to increase access to early childhood home visiting to families in Steuben County, continued to grow
- During a site visit from OCFS in April, the program was found to be performing well in all areas

Therapeutic Foster Care

Therapeutic Foster Care specializes in the care of hand-to-place children and adolescents. The focus is to develop a child’s self-esteem, positive behavioral skills and confidence. The aim is to guide children and their families as they transition back to home, schools and community in Steuben and adjacent counties.

Key service statistics for the time period are:

	2013	2014	2015	2016
Youth Served	46	33	46	46
Successful Outcomes	61%	73%	61%	61%
Adoptions	0	5	0	3
Permanent Placement	4	2	2	6
Returned to Parents	12	2	13	10

Program highlights during this time period included:

2013

- The agency held a picnic to honor foster families attended by 30 participants
- An independent marketing person was hired to help to recruit foster parents
- An aggressive Recruitment and Retention plan for 2014-2016 was submitted in December

2014

- A part-time person was hired as a home-finding specialist
- Melissa Nichols Mahany was chosen as Coordinator under Lisa Galatio after Program Director Cindy Fitzwater left
- Five adoptions occurred

2015

- Three new homes were opened during the year
- There were 28 new children in care

- A December restructuring resulted in the more efficient and cost effective sharing of staff with other programs
- The agency received a \$68,344 grant from the NYS Department of Health to engage in readiness activities around managed care

2016

- The program celebrated its thirtieth anniversary
- At the end of November, a sibling group of three was adopted by their foster parents
- The Encompass Family Health Home, in which Rochester Catholic Charities partner with three other Upstate Diocesan Catholic Charities agencies went operational on December 5, 2016

SHAPE (Supportive Home and Parent Enrichment)

SHAPE provides guidance, instruction and support to families in crisis referred by DSS in Steuben, Allegany and Yates Counties. Support is provided through individually tailored home visitations.

Service statistics for this time period were:

	2013	2014	2015	2016
Steuben/SHAPE				
Families	126	98	99	112
Children	391	211	233	230
Allegany/SHAPE				
Families	47	49	5	41
Children	123	113	115	85
Yates/Intensive Home ???				
Families	17	16	19	15
Children	33	38	44	40
Yates/PINS				
Families	21	20	9	15
Children	54	44	21	24

Program highlights during this time period included:

2013

- SHAPE was funded for a TANF program called SIRF for one year
- The Yates County Office co-located with Catholic Charities Community Services creating a critical point of entry for service provided by the two regional Catholic Charities agencies physically present in the County

2014

- In Steuben County, the SHAPE program focused on increasing the effectiveness of the “Enhanced Coached Visitation Toolkit” training for families with children
- For Allegany County, staff trained with DSS to concentrate on the “Trauma Informed Solution Focused Care” approach to service

- In Yates County, programs focused on increasing KAT (Kids Adventure Time) enrollment and attendance. On average, 62 children received lunch through the Open Summer Food Service program.
- Five young people worked through the Summer Youth Employment Program

2015

- In Allegany County, the program focused on continuing Coached Visitation Contracts
- In Steuben County, the focus was on increasing the percentage of families who were engaged in SHAPE services
- In Yates County, the focus was on increasing services to increase home-based parenting services to families with mandated cases in the Department of Social Services

2016

- SHAPE programs in all three counties met or exceeded their contract outcome requirements
- In Steuben County, families were engaged in 3.5 contacts per month
- Across all three counties, parenting skills were improved in 95% of families

Bath Community Child Day Care

This New York State licensed child care center provides quality care to children six weeks to twelve years of age in a safe, nurturing and developmentally appropriate environment. It is currently the only center serving Central Steuben County. Darcy Cherry has been the Director since September of 1991.

Services statistics for this time period were:

	2013	2014	2015	2016
Infant, Toddlers, Pre-school	69	54	54	54
School Age	74	91	91	91
Scholarship Families	22	15	15	15
Scholarship Children	38	21	21	21

Program highlights during this time period included:

2013

- The center celebrated several events during the week of the Young Child in April, including a special Parent Appreciation Day
- Darcy Cherry, Center Director, continued to do a good job raising census and implementing the six Sigma correction project with Accounts Receivable

2014

- The Center received a grant of \$30,000 from Corning Enterprises
- In 2014, the Center awarded \$13,255 in scholarship money to 15 families
- A Child Day Care Facebook page was created to help make the program more visible in the community

2015

- The Day Care Center adopted the theme of literacy throughout their summer day care program
- The 25th anniversary of the Day Care Center was celebrated in December with a timeline of pictures down the hall and with acknowledgement at the Holiday Concert and Dinner

2016

- The Day Care Center underwent a successful licensing review

e. **The Advent of Medicaid Managed Care: A Brave New World**

For a comprehensive overview of the impact of changes in Medicaid Managed Care on Diocesan Catholic Charities, including Catholic Charities of Steuben, refer to the writer's previous work "A Brave New World: The Evolution of Diocesan Catholic Charities Activities 2013-2016." Recorded here are activities undertaken specifically at Catholic Charities of Steuben.

Mentioned above were activities undertaken in 2015 in the Therapeutic Foster Care program specifically to prepare for the advent of Children's Health Homes, including receipt of a \$68,734 grant from the State Department of Health to engage in readiness activities around managed care.

In 2016, several other activities were undertaken.

An internal group was established to work on development of the HCBS Waiver Program under "Empowerment Services." This program, a joint activity of Turning Point and Substance Free Living, will use peers from the Supportive Living Program to provide support to individuals who are new in the recovery program. A staff person went to a "Train the Trainer" certification class so that he could train "peers." Two trained peers have been working toward their required accreditation by completing Patient Activities Surveys (PAMS) for Turning Point.

Turning Point has also applied to do County Navigator work which will enable the agency to bill Medicaid under value-based points. This program requires working with clients who have Crohn's disease and/or are uninsured and need access to healthcare, transportation, food, shelter and utility services.

At the July Board Retreat, there was an extensive presentation of the impact of Medicaid Managed Care changes on the agency's programs.

Through Diocesan Catholic Charities, the agency has been involved with the Encompass Family Health Home, sponsored jointly by the four upstate Diocesan agencies, serving 48 counties. The program became operational on December 5, 2016. Most participants will be from the Foster Care program.

At the end of 2016, the agency was in the process of signing required contracts with Managed Care organizations.

Throughout the time period, the agency was heavily involved with the DSRIP program.

5. Advocacy and Parish Social Ministry

Through the leadership of Justice and Peace Coordinator Lynda Lowin (who as previously indicated became Turning Point Director in 2013) the agency was actively involved in carrying out these two important elements of its mission statement.

The agency continued its active participation in the work of the Diocesan Public Policy Committee, described briefly in the introduction to this work and more fully in “A Brave New World.”

In addition, the agency was involved in a number of activities in Steuben County.

A major program ongoing throughout this time period was the Bridges Out of Poverty Program, coordinated jointly with Pro-Action of Steuben and Yates Counties. The purpose of the program is to “support and develop” people in poverty by linking them to resources that strengthen and empower them, providing the “Bridge” to move individuals and families out of poverty. As articulated in the agency’s 2013 Annual Report, the elements of the program are:

- **Train:** 65 community members attended Bridges Out of Poverty training provided by local certified Bridges trainers. 22 overview presentations were delivered to 335 individuals in community, education, business, and human service sectors.
- **Embed:** Bridges partner organizations began implementing Bridges concepts in the workplace and cultivated commitment to the process of eliminating poverty by building resources.
- **Model:** 15 new graduates of “*Getting Ahead in a Just Gettin’ By World*” (*Getting Ahead*) will investigate a better future having learned how the world outside of poverty works and building relationships to support future plans.
- **Spread:** Community Table, sponsored by St. Thomas Episcopal Church in Bath, provided infrastructure for Monthly Networking Meetings for *Getting Ahead* grads.

In this time period, the agency organized five different sessions of “Getting Ahead in a Just Getting By World,” which graduated over 40 individuals.

Another facet of the Bridges program was organizing a Poverty Simulation. On October 26, 2015, Catholic Charities sponsored such a session for 68 community participants and 20 volunteers at Watson Homestead in Painted Post. Poverty Simulations provide the experience of living with:

- The financial pressure of providing for basic needs (rent, food, utilities, etc.) faced by low-income families
- The difficult choice people with few resources have to make when stretching a limited income
- The barriers faced by people to become self-sufficient on a limited income

- The emotional stress and frustration created by having limited resources

Besides Bridges Out of Poverty, the agency engaged in a variety of other advocacy/parish social ministry activities during this time period:

- Each year, weekend visits were made by staff to all parishes
- A major focus in 2013 was advocacy for increased access to mental health services
- The Bath Area Churches Progress Dinner to fight hunger has been described previously
- On April 23, 2015, the agency joined a press conference to raise awareness of poverty in Steuben County
- In 2015, Lynda worked with the Continuum of Care on Workforce Development
- In 2015, “Pastor’s Discretionary” funds of \$2,000 were made available at all Turning Point sites to help those with unmet needs not eligible for other services

H. CATHOLIC CHARITIES OF TOMPKINS/TIOGA COUNTIES

1. Introduction

After a time of transition in the previous three years, this time period for Catholic Charities of Tompkins/Tioga Counties was a time of stabilization in 2013 and 2014 and then growth in 2015 and 2016. Long-term Board members were instrumental in forwarding this progress, and new Board members came to the fore during the end of this time period. Solid, steady leadership from the Executive Director, coupled with continuing contributions from long-tenured employees and important new hires, created a cohesive, collaborative approach making possible the program developments described here. Exhibiting creativity and flexibility, the agency managed the non-renewal of two grants, and was able to obtain funding to initiate/expand several services. The Justice and Peace ministry continued to be an important part of the agency’s work to fulfill its mission.

2. Board Leadership

As this time period began on July 1, 2013, the agency was still mourning the sudden and untimely death of Jerry Hass, a retired Cornellian and long-time volunteer for a variety of Diocesan activities, who had been elected Board Chairperson effective January 1, 2013 and passed away shortly thereafter. He was ably replaced by long-time Board member Jo Ellen Rose, who was a staff person in the Human Resources Department of the Alumni Affairs Office at Cornell. She served as chairperson until she reached her time of maximum allowable membership on the Board in December, 2014. Among her many accomplishments was helping, as a resident of Owego, to improve connections between the Tompkins and Tioga County offices and, as a member of Owego Rotary, increasing visibility of the agency in Tioga County. Recognizing that she would be rotating off the Board, she also recruited her colleague, the Director of the Human Resources Department of the Alumni Affairs Office, Joe D’Abbracci to the Board. He then served as Board Chairperson for 2015 and 2016. Also an outgoing and affable leader, Joe devoted a great deal of time to this role. Also, as a resident of Tioga County, he helped recruit new Board

members from that county and strengthened the membership of the Tioga Advisory Council.

Other long-time Board members continued to make important contributions. Phil Cox, retired Cornell Director of Facilities Management, continued to “be involved in just about everything.” Before rotating off the Board in 2015, George Frantz, who also worked in facilities management at Cornell, was instrumental in helping to upgrade physical facilities, including providing new signage at the Tioga building for the agency. Investment banker and Vice Chairperson (Fred) Rick Ballantyne also assisted with upgrading the facilities including installing new rugs and various stints at painting and caulking. Retired from M&T Bank, Art Pearce, who also rotated off the Board in 2015, served the agency as Treasurer. Retired from Cornell as Military Project Director, Marney Thomas provided invaluable counsel on human resources and served as the Secretary of the Board. Dan Brown, who was first Chief Financial Officer and then Chief Executive Officer of Racker Centers, a human service agency serving persons with disabilities, helped the new Executive Director by providing her wisdom on her role as the Executive Director. Father Jeff Tunncliff served on the Board and, as pastor of Immaculate Conception, was a friendly landlord during his time there.

Two additional supporters who continue to help move Catholic Charities Tompkins/Tioga forward are past board members. Mary Berens, who had served as Board Chairperson, not only continues to connect the agency to many opportunities in Tompkins County but also participates as a development committee member. The other community member who has supported Catholic Charities Tompkins/Tioga in many ways is Mary Pat Dolan. She filled in as Acting Executive Director three different times during leadership transition periods. Over the years she has also connected the agency to numerous opportunities and helps on the development committee.

As several long-time members were rotating off the Board, the agency was recruiting a new cohort of members. Mike Cannon agreed to take over the position of Treasurer beginning in 2017, taking over from Dan Brown (who succeeded Art Pearce) as Treasurer. Other newer members serving at the end of the time period were Leonardo Vargas-Mendez, Jane Doyle, Dean Casterline and Erin Marie Sembe-Chase.

Like all not-for-profit agency Boards, this Board, in addition to working with and supporting the Executive Director, provided leadership in strategic planning and fund-raising.

In late 2014, the Board adopted a Strategic Plan for 2015-2020. Major elements were:

Vision:

A just and compassionate community rooted in love and the dignity of all people.

Mission:

We support all people in need and advocate for social justice and human dignity in partnership with the Diocese of Rochester and the greater community.

Values:

1. Beloved Community: We value all members of the community and invite their wisdom.
2. Compassion: We respond to the needs of others with dignity and love.
3. Excellence: We utilize all people’s strengths to provide the best services.
4. Integrity: We say what we mean and do what we say.

2015-2020 Strategies:

- Enhance the self-sufficiency of the people we serve
- Strengthen the safety net capacity to respond to those in need
- Increase the number of people within our faith communities who are participating in social justice and advocacy activities.

The Board was also active in fund-raising. By the end of 2016, the agency had developed a regular calendar of annual fund-raising events, including:

- April – Samaritan Society Event
- May – Pasta Dinner in Tioga County
- June – Spring Appeal
- October – Pasta Dinner in Tompkins (hosted by Father Joe Marcoux)
- December – Winter Appeal

During this time period, there was significant growth in proceeds for the Samaritan Society and through the Pasta Dinner provided by Father Marcoux.

Overall annual results for this time period were:

2013	\$135,300
2014	\$140,800
2015	\$160,700
2016	\$179,000

Finally, the Board began planning in 2016 for its twentieth anniversary celebration in 2017. Several events are planned culminating with an anniversary mass celebrated by Most Reverend Bishop Matano coupled with an Open House to be held on July 11th. With an annual budget over \$1,000,000, the Board has brought the agency a long way during this twenty year period.

3. Staff Leadership

A significant moment in the history of Catholic Charities of Tompkins/Tioga Counties was the hiring of Renee Spear as Executive Director in fall 2012. As indicated previously, in the transition period of the previous years, three different Executive Directors had led the agency. The agency was desperately in need of

steady, stabilizing leadership. Renee responded to that need in outstanding fashion.

Having obtained Bachelor of Science in Education and Master of Science degrees from SUNY Cortland, Renee brought with her to this position nearly twenty-five years of experience in human services delivery and administration. Much of her early career was devoted to service provision to persons with disabilities. Included in her experience was her service in the mid-2000's as Director of Community Options in Binghamton where she managed a budget of more than \$2,000,000 and ninety persons. Her two positions immediately before coming to Catholic Charities were serving as Day Habilitation Director for Achieve in Binghamton and then a two year stint as a Residential Manager at Catholic Charities in Binghamton. In the latter position, she was manager of two group homes and two transitional living apartments providing support to youth with mental health issues. (An excellent athlete herself and currently member of a community slow pitch softball team, she also had spent time as a coach of both women's basketball and softball teams at Broome Community College.)

Renee brought with her to this position both the technical skills and the calm, steady approach necessary to effectively lead the agency. As an "outsider" not from Ithaca, she had to become known and trusted in the human services communities in both counties. One example of this effectiveness has been gaining additional support for the Samaritan Center from the Urban Renewal Agency and Park Foundation. Supported and trusted by staff, she brought a much greater sense of continuity and collaboration among staff. She made great strides in creating the sense among Board and staff that the organization is one agency, not two separate silo counties. Examples are her cross-utilization of staff such as Laurie Ellis, giving her responsibilities in both counties, and the impending combination of phone systems to save on costs of receptionists.

In her work, Renee was supported by and helped further develop professional skills of several employees who were working at the agency when Renee came. Laurie Ellis, trained as a paralegal and with experience in Domestic Violence Services, came to the agency as the Nutrition Outreach and Education Program (NOEP) in 2011, and became Director of Tioga County Services in 2012. A "salt of the earth" person, she is a passionate advocate. As indicated above, with Renee's tutelage, she has taken some supervisory responsibilities in the Ithaca office and is developing further professional skills. Laurie Konwinski, a Notre Dame graduate, who had with her husband spent five years serving the indigent community in Haiti, and has long been an advocate for the migrant population came to the agency initially as a part-time Justice and Peace Coordinator (also serving in the same role simultaneously part-time at Catholic Charities of the Finger Lakes). In January, 2016, Renee appointed her to the position of full-time Deputy Director, where she now has responsibility for the development function as well as continuing in her role as the Justice and Peace Coordinator. In many ways, Tommy Miller, who has been with the agency for seventeen years is the "heart and soul" of Catholic Charities of Tompkins and Tioga Counties. Outgoing and irrepressible, he has responsibility in the Family Empowerment program and is particularly proud of the Fatherhood program he started. Petrea

Rae was the Youth Engagement Coordinator in Tioga until 2015 when her husband got a teaching job out of the area. Petrea was instrumental in the success of the YES program. Finally, included in this core group is Sue Chaffee, who has served as Director of the Citizenship and legal Immigration Services program since 2009. She brings considerable technical expertise as well as a compassionate service approach to this program. Happily, in the wake of the Office of New Americans contract not being renewed because Tompkins County was not among the counties eligible for renewal, she can now bring her skills to the newly created refugee resettlement program.

Beyond this core team are recently hired staff members, including Virginia Ubari, Director of the Samaritan Center who went part-time to Samaritan Center Assistant in 2016; Elizabeth Bargar, was hired as the Service Navigator in 2015 took over as the Samaritan Center Director in 2016; Michaela Cortright who was hired as the part time Tompkins Receptionist in 2015 took over as the Service Navigator in 2016; Sandra Siegfried, YES program coordinator in Tioga County and Vicki Thierfelder, Employment Specialist in Tioga.

Clearly, Renee has built an effective leadership staff team.

4. Direct Services

a. Introduction

During this time period, Catholic Charities of Tompkins County maintained its core programs. While losing two of its important funding sources, the agency was nonetheless able to add four new programs.

Described here are:

- Financial Assistance
- Housing
- Food and Nutrition
- Citizenship and Legal Immigration
- Employment
- Youth and Families
- New Program Initiatives in 2016

b. Financial Assistance

The agency provides financial assistance and other emergency assistance through the Samaritan Center in Ithaca and the Tioga Outreach Center in Nichols.

The Samaritan Center provides urgent short-term assistance to families and individuals in immediate crisis. Assistance is provided with security deposits, prescriptions, clothing, transportation, utilities and connections to other agencies which can help a family move from crisis to stability. Recently there is more emphasis on moving families to self-sufficiency. Also, the Samaritan Center provides facilitated enrollment for both SNAP benefits and free or low cost health insurance.

During this time period, the Samaritan Center served 2,040 individuals in 2013, 2,071 in 2014, 4,173 in 2015 and 3,843 in 2016. Service highlights included:

2013

- 41,643 items were distributed through the clothing project
- 341 bus passes were given to get people to work or medical appointments
- 35 students were provided with transportation to college and vocational classes

2014

- There were 12,387 visits to the clothing closet
- 6,267 packages of personal hygiene products were distributed
- 751 bus passes were given to get people to work or medical appointments
- 35 students were provided with transportation to college and vocational classes

2015

- 42,801 items of clothing were distributed
- The clothing distributed included over 900 winter coats and 600 hats collected through the Rotary Club of Ithaca's Share the Warmth Annual outreach drive
- 665 bus passes and gas vouchers were distributed to help provide travel to work, school or medical appointments
- 50 households were provided assistance with utility costs

2016

- 17,350 individuals benefited from the clothing closet
- 5,415 personal care packages were distributed
- Through Share the Warmth, 3,379 cold weather items were distributed
- On the Samaritan Center's first annual Spring Clothing giveaway more than 5,000 much needed items were distributed to 475 adults and children
- 75 students received back-to-school backpacks
- 429 bus passes or vouchers were given out

The Tioga Outreach Center in Nichols also offers urgent, short-term assistance to families and individuals in crisis, as well as facilitated enrollment in both SNAP and low cost health insurance.

For this time period, service highlights included:

2013

- 436 households (1,255 people) were able to access free new and gently used clothing
- 44 households were helped with assistance to avoid utility shut off or fill their fuel tank to keep their house warm
- The Job Board, listing current employment opportunities, was one of the most popular services offered

2014

- 436 households (1,255 people) were able to access free new and gently used clothing
- The Wheels for Work program assisted individuals with car repair and services
- The Center was able to provide financial assistance to 40% more families than in 2013

2015

- The Center assisted 76 households in need, including providing funding for 33 households to cover electric and heating costs
- 1,040 diapers and 686 personal care packages were distributed

2016

- At the Tioga Outreach Center, 502 households received clothing assistance and 53 families received Christmas gifts.

c. Housing

Throughout this time period, the agency worked in several ways to enable families to fund or remain in safe, affordable housing. Service highlights included:

2013

- Through the Samaritan Center, 83 households secured stable housing
- Also, through the Samaritan Center, 112 homes were kept warm and lights were kept on
- Through the Tioga Outreach Center, 23 households were helped with security deposits to find appropriate housing or pay rental arrears to help families remain in their own homes

2014

- Through the Samaritan Center, 23 households secured stable housing
- Also through the Samaritan Center, 208 people avoided utility shut-offs/kept heat on
- Through the Tioga Outreach Center, 25 families were helped with rent arrears and 43 families were helped with a security deposit.

2015

In 2015, with the support of the Human Services Coalition of Tompkins County, Catholic Charities launched a pilot project called the **Service Navigator**. This staff member provides personally tailored solutions that interrupt the cycle of poverty and guide people toward self-sufficiency. Through this new program and at the Samaritan Center and Tioga Outreach Center, program highlights were:

- The Service Navigator assisted 56 clients seeking stable housing
- In both counties, Catholic Charities provided a total of 95 low income households with security deposits so they could afford to enter their new home

2016

In Tioga County, 25 families received assistance with heat/utilities and 20 families received rent/security deposit assistance. In Tompkins County, 139 families received utility assistance and 102 families received rental assistance.

d. Food and Nutrition

Food and nutrition assistance were provided by the Nutrition Outreach and Education program (NOEP), which helps residents apply for SNAP benefits, the Samaritan Center, the Food Pantry at the Tioga Outreach Center and Mobile Food Pantry services. Highlights during this time period included:

2013

- Through the NOEP program in Ithaca
 - * 353 face-to-face screenings to ensure eligibility for SNAP were provided
 - * 164 households were assisted in applying for and receiving SNAP benefits
 - * Presentations about the benefits of SNAP were given to over 600 people at local food pantries, churches, schools and other outreach events
- Through the NOEP program in Tioga County
 - * 303 face-to-face screenings to ensure eligibility for SNAP were provided
 - * 154 households were assisted in applying for and receiving SNAP benefits
 - * Presentations about the benefits of the SNAP program were given to 2,221 people at local food pantries, churches, schools and other outreach events
- Through the Food Pantry in Tioga
 - * Over 40,000 pounds of food were distributed to 559 households (1,600 people)
 - * The agency partnered with the Food Bank of the Southern Tier in sponsoring 16 Mobile Food Pantry events in Nichols and Lockwood

2014

- In Ithaca, the NOEP program provided 335 face-to-face screenings to ensure eligibility for SNAP and helped 172 households apply for and receive SNAP benefits
- In Tioga County, from January until June, a total of 47 individuals were assisted by the agency and approved for SNAP benefits
- In Tioga County
 - * Over 40,000 pounds of food were distributed to an average of 450 people per month
 - * Seventeen mobile food pantry events sponsored in collaboration with the Food Bank of the Southern Tier enabled 2,000 families gain access to food

2015

- In Tioga County, funding for the NOEP program was not received after 2014. Staff in Tompkins County aided 136 people in successfully accessing SNAP benefits
- The agency applied for and received a grant from CCUSA to provide SNAP outreach in Tioga County
- In Tioga County, over 40,000 pounds of food were distributed at the food pantry and mobile food pantry events serving 619 households representing 1,800 individuals

2016

- In Tioga County, through the SNAP outreach program funded by Catholic Charities USA, 62 SNAP applications were approved and information presentations were given to 1,056 persons
- In Tompkins County, through the NOEP, 494 persons were prescreened, 224 persons were assisted and 146 seniors were approved for SNAP benefits
- At the Food Pantry in Tioga County, 638 households were served in 1,827 visits to the Food Pantry
- Also in Tioga County, the agency coordinated a summer feeding program at several sites with food provided through the Tioga Central School District

e. Citizenship and Legal Immigration Services

Through the Tompkins County-based Immigration Services program, services provided included assisting refugees and immigrants to become permanent legal residents, helping clients renew their work authorization, applying for family members to come to the United States and assisting clients in replacing lost immigration documents.

In addition, through a grant from the State Office of New Americans for the early part of this time period (which unfortunately was not renewed after 2015, because Tompkins County was removed from the list of counties eligible to submit renewal applications), a variety of other services were provided. These services included assisting immigrants with language or cultural barriers to access community resources and a Job Development Service program providing concrete support to immigrants with limited English proficiency.

Program highlights during this time included:

2013

- 511 persons received legal immigration and citizenship services:
 - * Citizenship Services – 182
 - * Legal Services – 175
 - * Naturalization Applications filed – 83
 - * Legal Consultations – 61
- 220 individuals received Job Development and Entrepreneurial Support Services:
 - * Job Finding – 140
 - * Resumes Created – 46

* Entrepreneurial Support – 34

2014

- 464 job development services and 245 direct services and referrals were provided
- 265 legal immigration services were provided and 245 citizenship services were provided

2015

- 145 clients received legal immigration and citizenship services
- 83 persons were guided through the process of becoming U.S. citizens by preparing and filing their citizenship application

2016

- 833 services were provided to the immigrant community
- Direct services and referrals were provided to 730 clients who sought assistance with the following:
 - * Citizenship and legal immigration services
 - * Accessing resources for basic needs
 - * Job development
- Described below is the refugee resettlement program that was initiated in 2016

f. Employment Services

As previously described, in late 2014, through funding from the Urban Renewal Agency and Human Services Coalition, a new vital service was added to the Samaritan Center: the Service Navigator. The staff person in this position works with clients to create and implement achievable goals, advocates on their behalf and provides follow-up to assess how the agency helped them address their needs. The Service Navigator can assist with:

- Filling out applications
- Connecting the client to other resources
- Money management
- Going with the client to agencies/apartments
- Resume, interviewing and job seeking
- Education Access

In addition to the successful work of the Service Navigator in helping families gain secure housing as previously described, program highlights in the employment area were:

2015

- Together with the Immigrant Service Program, the Service Navigator assisted more than 60 clients in creating resumes and searching for jobs
- At both offices, information was maintained on current job openings
- At the Ithaca office, the computers were set up to enable clients to search for and apply for employment

2016

During 2016 a formal employment program was initiated in Tioga County. Program highlights included:

- 36 persons were placed in jobs
- 31 individuals were assisted with transportation needs/barriers through a small grant from the Rural Health Network
- 36 individuals received job coaching
- 17 individuals received education services which included assistance with FAFSA applications, GED class enrollment and college applications

g. Youth and Families

In Tompkins County, the Family Empowerment services staff mentors, guides and supports families undergoing home and conflict, through three different programs:

- **Community Connections** assists families whose children have been taken from them and placed in Child Protective Services. In 2013, 54 families were assisted in this program. Fifty-three families were assisted in 2014. In 2015, 42 families (comprised of 64 adults and 75 children) were mentored. In 2016, the program served 50 families with a total composition of 72 adolescents, pre-teens and infants.
- The **Parent Partnership** Program forges collaborations with families who have children with emotional and behavioral problems such as poor school attendance and aggression. In 2013, 30 families were assisted in creating a plan of collaboration with Tompkins County to keep children at home or create minimally restrictive out-of-home placements. Thirty-four families were assisted in 2014, and over two dozen were served in 2015. In 2016, the program was designated as the parents advocacy component of the Single Point of Accountability (SPOA) Team in Tompkins County. In 2016, there were 36 SPOA meetings, with delivery of 45 units of service.
- The **Fatherhood Initiative** supports young fathers who are disengaged from parenting due to divorce and other issues. Fifteen fathers participated in 2013, 19 in 2014 and 20 in 2015. Also in 2015, the agency ran a 32 week support group for parents and expectant parents on topics such as proper discipline of children and the role of fathers. In 2016, supportive counselling and intensive case management services were provided for 34 fathers with family composition of 60 adolescents, pre-teens and infants.
- In Tioga County, the agency provides at-risk teens with encouragement to stay in school and reach their full potential through the **Youth Engagement Service (YES)** program, funded through a grant from Catholic Charities USA. The program had been operating for several years at Newark Valley High School and in fall 2015 opened a new site at Spencer-Van Etten High School. In 2013, a new mentoring component was added for youth ages 9-12. Throughout the school year YES students receive tutoring, attend workshops on life skills, such as nutrition and money management, and learn to set goals. Students do volunteer work during the school year and Catholic Charities helps some participants find subsidized employment.

In 2013, 29 students were involved in YES club activities, and five mentors were trained. In 2014, 25 youth were served. Four graduates went on to college. In 2015, 24 young people took part in YES and 9 young people were mentored. In 2016, 20 students were served in Newark Valley and 15 students from Spencer-Van Etten were served. Eight mentors were trained.

h. New Program Initiatives in 2016

The agency added two major new programs in 2016: the refugee program and “A Place to Stay”, a home for single women at risk of homelessness.

Because Catholic Family Center has long administered a highly successful refugee program funded by the United States Catholic Conference of Bishops (USCCB), because in early 2016, USCCB was seeking new communities to locate refugees because of increased demand, because Catholic Charities of Tompkins/Tioga Counties had been administering a successful immigration service program, and because Ithaca was recognized as a welcoming community, Catholic Charities was awarded a contract in 2016 to resettle 50 individuals over the subsequent year. Sue Chaffee was the perfect person to staff this initiative. The agency actively solicited community support for this program, which was very positively received when it was publicly announced in summer 2016. After the agency had done the necessary work to prepare for accepting its first refugee families, as the year was ending, some doubt was cast on the future of the program at the end of the year by the results of the presidential election.

In summer, 2016, through a “Women Building Community” grant from the Ithaca-based City Federation of Women’s Organizations and other generous support, Catholic Charities was able to rent and furnish a lovely, renovated home to provide housing for up to four women at a time,. “A Place to Stay” is designed to provide women with a safe, secure home for 90 days, along with the support and guidance they need to find and maintain their own permanent housing. When people are no longer homeless, “couch-surfing” (going from place to place) or living in their cars, they can focus on attending addiction recovery treatment, setting goals and planning for the future. Catholic Charities has arranged for residents educational opportunities including cooking and nutrition classes and information on credit counseling and financial literacy. Those ready to seek employment are given guidance in resume writing and interview preparation. The program assists those whose time at the house is nearing an end in securing their own affordable housing. In 2016, ten women were supported.

5. Justice and Peace Ministry

The goal of the Justice and Peace Ministry is to educate and activate people on a broad spectrum of social concerns. Throughout this period, Justice and Peace Coordinator Laurie Konwinski facilitated this work in a number of ways.

She was an integral part of the work of the Diocesan Public Policy Committee, whose activities are described fully in “A Brave New World: The Evolution of Diocesan Catholic Charities Activities 2013-2016”.

She collaborated with local Catholic parishes and congregations and the broader community to promote public policies that serve the common good. An important component of this work is publication of a monthly Justice, Peace and Life newsletter.

In 2013, major issues of focus were:

- Working with the Labor-Religion Coalition to organize a campaign on the labor rights of wait staff in restaurants
- In conjunction with the Diocesan Public Policy Committee, gathering 855 petition signatures in support of increasing child care subsidies for low income parents
- In solidarity with USCCB, educating about and advocating for comprehensive immigration reform
- 130 people attended the Fifth Annual Peace Mass, held in conjunction with the International Day of Peace.

In 2014, major issues of focus were:

- Organizing “Interfaith Climate Justice Inquiry to Action”, a series of five workshops on global climate change
- Promoting Tipped Worker “Know Your Rights” cards
- The Justice and Peace Ministry and Labor-Religion Coalition presented the 16th Annual Religion and Community Leaders Breakfast Briefing, with a keynote address “Working and Still Poor”

In 2015, major issues of focus were:

- Awareness training and advocacy on issues of childhood poverty, child care subsidies, human trafficking and environmental stewardship
- The Justice and Peace Coordinator continued to serve in leadership roles in two organizations: the Interfaith Climate Action Network (ICAN) and the Labor-Religion Coalition of the Finger Lakes, promoting respectively environmental justice and workers’ rights issues

In 2016, major issues of focus were:

- In support of the Diocesan Public Policy Committee annual advocacy efforts, 727 petitions were gathered asking State Legislators to increase child care subsidies
- The Interfaith Climate Action Network held four quarterly forums and organized two ecocruises in collaboration with Cayuga Lake Watershed Network and the Floating Classroom
- Three major events were held during Peace Week
 - * An evening prayer service at All Saints parish featuring a presentation by Dorothy Day’s grandchild
 - * A screening of the documentary “He Named Me Malala”, about the life of Nobel Peace Prize winner Malala Yousafzai

- * A Muslim-Catholic dialogue at Immaculate Conception attended by over 60 persons
- At the Ithaca office
 - * Completion of an energy audit through NYSERDA
 - * Continuing work by the Labor-Religion Coalition on Workers' rights
 - * The 18th annual Religious Leaders Breakfast Briefing focused on “How I Spend My Money”
 - * There was focus on advocacy in opposition to physician-assisted suicide

I. FOOD BANK OF THE SOUTHERN TIER

1. Introduction

As described fully in previous works, the five year time period prior to June 30, 2013 was a time of dramatic growth and expansion for the Food Bank. Through the \$5.8 million raised in a capital campaign, the Food Bank was able to purchase and renovate a 65,000 square foot facility (the former Seneca Beverage facility on Upper Oakwood Avenue in Elmira) and obtain funds to develop several new program initiatives. While this time period on the surface does not appear to have been as exciting, Board and staff at the Food Bank continued to perform outstanding services and create several new important initiatives. While a number of founding Board members who joined the agency when it was established as a separate entity within the Catholic Charities family in 2003 had rotated off the Board after fulfilling the maximum allowable three year terms, the Board was successful in attracting a new cohort of outstanding leaders. CEO Natasha Thompson continued to manage a cohesive, efficient strategy for growth. As described below, several new programs were expanded or initiated. While Food Bank leadership had always been involved in advocacy efforts as needed, during this time period, much more focused and sustained attention was given to these efforts.

2. Board Leadership

While their terms as Board Chairperson had ended before this time period, mention must be made of Board Chairpersons Richard Wardell (2003-2006), Sister Marie Castegnaro (2006-2009) and Mary Pat Dolan (2009-2012), because their contributions continued to benefit the agency during this time period. Dick Wardell provided the leadership that enabled the newly established agency to build a strong foundation. Even after his death, Dick further contributed to the agency with a generous bequest in 2016. Sister Marie and Mary Pat Dolan led the process which led to the decision to purchase the Seneca Beverage facility and launch the capital campaigns and then oversaw the successful rolling out of the capital campaign. (Former Board member John Alexander also played a major role in the capital campaign, both through a substantial personal gift and as Chair of the Development Committee.) Happily, Mary Pat Dolan returned to the Board in 2015. (She had also served the Food Bank as its representative on the Diocesan Board for nine years and was presented the Bishop Clark Award in 2014).

Krista Niles Updike, a partner at Mengel, Metzger, Barr succeeded Mary Pat as Chairperson, and served as Board Chair during 2013-2014, overseeing the

conclusion of the capital campaign and the launching of new program initiatives. She also joined the Diocesan Board Audit Committee, contributing her accounting expertise to the larger Catholic Charities family. In February, 2014, Stephen Fowler was elected Board Chairperson and has served throughout the remainder of this time period. As the head staff person in the Corning, Inc. Global Credit division, he has brought leadership, financial and management skills to this position.

A number of the Board members have contributed considerable time and effort to the evolution of the agency. Long-time member Dave Radin, who has served as the Vice-Chairperson of the Board, has contributed his human resource and staff education experience based upon his experience at Corning. A close neighbor, he is a frequent visitor to the agency, always encouraging staff. Another long-time member, Nancy Miller, retired from Lockheed-Martin in Owego and a resident of Binghamton, has been instrumental in strengthening the presence of Food Bank in Broome County. Another retired Corning executive, Joe Antos, contributed his strategic planning expertise to the development of the 2016-2018 strategic plan, and was instrumental in securing \$500,000 from the Corning, Inc. Foundation. From July 2015 through the end of 2016, Joe also served as at-large member of the Diocesan Board. Bill Powell is another legacy from Dick Wardell. A fellow member of the Big Flats Lions Club, Dick recruited Bill as a Board member in 2009. He replaced Mary Pat Dolan as the agency's representative on the Diocesan Board. Mark Bordeau, Senior Food Service Director for Broome-Tioga BOCES, was instrumental in the development of the Backpack program and also has become the chair of the Ad Hoc Advocacy Committee established in 2016. Krista Matia served as a Board member from 2013-2016. She, too, became so enamored of the agency that she joined the staff in the Development and Community Engagement Department. Space does not permit mention of all Board members but the spirit and expertise of all have contributed to the outstanding success of the agency.

Beyond working with and supporting the CEO, important responsibilities of any not-for-profit Board are strategic planning and fund-raising. The Food Bank Board has excelled at both responsibilities.

As articulated in recent Annual Reports, the mission and vision of the Food Bank are:

Mission

Working together to build and sustain hunger-free communities throughout the Southern Tier.

Vision

The Food Bank of the Southern Tier is committed to creating a future without hunger where access to healthy food by all is recognized as fundamental to the well-being and success of individuals and the foundation of a strong, vibrant society.

Following is the summary of the 2016-2018 Strategic Plan adopted by the Board:

FEED - Address the problem of hunger today

Aspiration: We aspire to provide quality, nutritious food to those in need.

1. Maximize local food resources
2. Optimize food access for clients
3. Focus on nutrition

LEAD - Mobilize a movement around the issue of hunger

Aspiration: We aspire to engage stakeholders in meaningful ways to help build and sustain hunger-free communities.

1. Educate
2. Advocate
3. Convene & Collaborate

STRENGTHEN - Build & leverage resources

Aspiration: We aspire to build our capacity and the capacity of our network to support FEED and LEAD strategies.

1. Develop stakeholder engagement strategies that target “Head, Hands and Heart”
2. Build internal capacity
3. Build agency capacity

The fund-raising activities of the Board can be summarized in three categories: capital campaigns, direct mail and annual events.

As described in previous histories, Board members played a significant role in the success of the \$5.75 million capital campaign to purchase the former Seneca Beverage Building, both through their own generosity, and through making “asks” for other large donations. The Board also played an instrumental role in raising \$1M in 2016-17 (including a \$275,000 grant from the State-Not-For-Profit Infrastructure Grant) to replace the Agency’s truck fleet. Since the capital campaign, the role of Board members has shifted more to making connections and introducing new potential donors to the organization.

Fund-raising through the direct-mail program and events such as Check-Out Hunger, during this time period have been remarkable.

Total fund-raising results:

2013	\$1,727,005
2014	\$2,080,546
2015	\$2,485,676
2016	\$3,689,381*

*2016 figures include several significant unanticipated bequests.

Proceeds from the Check-Out Hunger initiative, organized in conjunction with local grocery stores were:

2013	\$ 228,182
2014	\$ 259,566
2015	\$ 267,391
2016	\$ 274,487

From the Selfish Elf 5K event, established in 2014, proceeds were

2014	\$ 40,000 from 800 participants
2015	\$ 50,000 from 1,200 participants
2016	\$ 65,000 from 1,250 participants

The Food Bank also established a major donor program- the Circle to Feed Hope- as a way to continue the momentum generated by their successful capital campaign. Proceeds from the Circle to Feed Hope were

2014	\$274,731
2015	\$300,578
2016	\$357,665

This extraordinary success has made possible the program expansion described below.

3. **Staff Leadership**

Much of what is written here about the outstanding accomplishments of the Food Bank is due to the extraordinary leadership of Natasha Thompson was promoted to President and CEO in 2008. Her career prior to that time was very helpful, giving her the necessary experience to excel in this position. After graduating from the University of Rochester, Natasha took a position with the Rhode Island Community Food Bank. Wanting to return to the upstate New York area, she responded to an opening at the Food Bank of the Southern Tier where she was hired as Operation Front line Coordinator in 2001 followed by her appointment as Director of Agency and Program Service in 2002. While in this position, she worked to attain a Master's Business Administration from the Simon School of Business in 2007. These experiences positioned her well to become CEO in 2008. In this role, she has served not only the Food Bank, but all Diocesan Catholic Charities, as well as the Feeding America network of food banks, serving several years as a member of the Feeding America National Advisory Council, including a two year stint as Vice-Chairperson. Since January 1, 2016, she has served as Chairperson of the Food Bank Association of New York State. In her nearly decade long term as CEO, Natasha has assembled and supported an excellent leadership staff.

Because the development function has been integral to the success of the Food Bank, development and marketing staff have played a key role in the functioning of the agency. The agency was blessed to be joined by veteran fundraiser Eleanor Cicerchi during the middle of the capital campaign. After a robust beginning, the capital campaign was somewhat lagging when she was hired, and Eleanor is credited with providing the leadership which drove it to successful completion. From 2003-2015, Gina Santadona played a key role in enhancing the visibility of the agency and during the capital campaign. . When Gina and Molly Sulkey, hired after Eleanor's retirement in 2013, both left the agency in

2015 because their husbands accepted positions in other communities, Natasha reorganized the staff and hired Michele Benedict-Jones as VP of Development and Community Enterprise. The fund-raising results detailed above are testament to her success.

A key staff person for the past six years has been Tim Currie, COO. A former employee of Bear Sterns with expertise in finance and marketing, Tim was hired in 2010 as Director of Warehouse Operations and served as Project Manager for the new facility project. His major initial responsibility was to successfully coordinate the move into the new facility in February 2011. Upon the successful completion of the project, Tim was appointed Chief Operating Officer. This skill in managing the internal operations of the organization have allowed Natasha to promote the agency externally and contribute to the State national organizations. When Tim became COO, he was replaced as Director of Warehouse Operations by Dave Patterson, a veteran of sixteen years with Coca Cola, who was responsible for increasing efficiencies including the implementation of the new bar coding system in the warehouse. Relating to internal operations, mention must also be made of Earl Leonard, Production Manager. In this capacity, Earl supervises the work of 3,200 volunteers who annually repack 1.5 million pounds of food. In the new facility, the repacking area has expanded from 400 square feet to 2,200 square feet.

Mentioned above is the intensified focus on advocacy in the agency. Two employees have led this effort. Lyndsey Lyman, hired in 2014 as Agency Capacity & Engagement Coordinator, has been working ever more closely with partner agencies to encourage advocacy activities. Randi Quackenbush was hired in 2013 as Hunger Education Coordinator, a new position made possible by the capital campaign. Randi participated in the Feeding America's Advocacy Academy, and through this work has been even more involved in legislative activities. Through her interest and involvement in the Advocacy Academy, Food Bank received a two year \$100,000 grant for advocacy capacity building. She was soon promoted to Advocacy & Education Manager where she supervises two full-time staff and an Americorps*VISTA volunteer as part of the recently established Advocacy and Education Department. As indicated above, the Board established in 2016 an Advocacy Committee, which may eventually become a Board Standing Committee. One important initiative begun in 2016 was the Speakers Bureau, a public speaking and leadership development program for food pantry clients. The Speaker's Bureau program trains clients to tell their stories, educate the community and advocate for themselves.

Father Neil Miller who established the Food Bank in 1981 could never have imagined that 35 years later there would be such a large, talented and committed staff overseeing the programs now to be described.

4. Direct Service Activities

a. Introduction

This time period has been marked by five major accomplishments in programs offered by the Food Bank:

- Steadily increasing volume of food distributed, topping the 10 million pound mark
- Increasing utilization of the Mobile Food Pantry approach, through the addition of specific sites for senior citizens
- Expansion to the Backpack program to 41 school sites
- An increasing emphasis on providing healthy nutritious food
- A more intensive focus on education and advocacy (to be described in the next section)

Described here are:

- Food Sources
- Overall Food Distribution
- The Mobile Food Pantry Program
- Backpack Program™
- Focus on Healthy Foods

b. Food Sources

The three major sources of food which can be distributed are donated food, purchased food and TEFAP Food.

- Donated Food
 - NATIONAL DONATIONS

As a member of Feeding America-the Nation's Food Bank Network- the Food Bank has access to donated food and grocery items from manufacturers, processors, and growers from across the US. Product is donated to Feeding America for a variety of reasons including seasonality, mislabeling, test marketing, and more. Donors receive a tax incentive for their donation as long as the product is deemed safe for human consumption. While the product is made available to the Food Bank free of charge, The Food Bank pays for the cost of transportation to receive it. National donors include General Mills, Kraft, Nabisco, ConAgra and Tyson Foods.
 - LOCAL DONATIONS

In addition to the national donations received through Feeding America, the Food Bank receives support from local partners including grocers, retailers, corporations, and individuals. Local initiatives such as food drives, Plant-A-Row for the Hungry, and the Venison Donation Program also help engage the community in hunger-relief efforts.
- Purchased Food
 - WHOLESALE FOOD PROGRAM

The Wholesale Food Program supplements other food programs by providing products and staples that are typically not donated through networks of local and national donors. Non-food items such as soap, diapers, and paper products are also sometimes available through this program.
 - THE HUNGER PREVENTION AND NUTRITION ASSISTANCE PROGRAM (HPNAP)

The Hunger Prevention and Nutrition Assistance Program (HPNAP) is a New York State Department of Health program dedicated to improving the quality and quantity of food consumed by low-income individuals. The Food Bank uses HPNAP funding to purchase nutrient-dense food, which is then made available to emergency food providers.

– Government Commodities

The Emergency Food Assistance Program (TEFAP) is a federal program that helps supplement the diets of low-income Americans by providing them with emergency food and nutrition assistance at no cost. Through TEFAP, commodity foods are made available by the U.S. Department of Agriculture (USDA) to New York State, which then provides this food to the Food Bank. Then the Food Bank distributes the food to community hunger-relief programs that directly serve the public. Recipients of TEFAP food must meet income eligibility of 185% of the poverty level.

c. Overall Food Distribution

In 2013, in response to 1.2 million requests for food, working with 167 partner agencies across six counties, the Food Bank distributed 9,719,816 pounds of food.

In 2014, in response to 1,248,987 requests for food, working with 151 partner agencies across six counties, the Food Bank distributed 10,012,408 pounds of food.

In 2015, in response to 1,359,883 requests for food, working with 167 partner agencies across six counties, the Food Bank distributed 10,089,342 pounds of food.

In 2016 in response to 1,275,166 requests for food, working with 165 partner agencies across six counties, the Food Bank distributed 11,553,304 pounds of food.

One significant factor in the increased amount of food distributed annually was the formation of a partnership with the Community Hunger Outreach Warehouse (CHOW), a program of the Broome County Council for Churches headquartered in Binghamton. While there had been many leadership conversations between the partners, it had been determined in 2012 that a stronger relationship would have a greater impact on the community. Through these discussions, it was agreed that CHOW would become a Re-Distribution Organization (RDO) of the Food Bank in accordance with Feeding America program guidelines. By 2016, the Food Bank and CHOW increased the amount of food distributed in Broome County significantly meeting 60% of the total estimated need compared to only 44% in 2012.

d. Mobile Food Pantry

The Mobile Food Pantry program delivers fresh produce, dairy products and grocery products directly to people in need.

In 2013, through 655 distributions, 3.4 million pounds of food, including 856,794 pounds of produce, were provided.

In 2014, through 616 distributions, more than 3 million pounds of food, including 722,062 pounds of produce, were provided.

In 2015, through 625 distributions, 3.2 million pounds of food, including 723,128 pounds of produce, were provided.

In 2016, through 833 distributions, 3.3 million pounds of food, including 925,159 pounds of produce, were provided.

An in-depth study of the program in 2015 revealed that 98% of the senior citizens served through Mobile Food Pantry distributions at senior housing sites lived at or below the poverty level, and 88% did not go to brick and mortar sites. It was determined therefore to more than double the amount of senior-specific distributions in 2016, including adding evening distributions.

In 2016, 7,564 seniors were served by Mobile Food Pantries at 23 senior housing facilities

e. Backpack Program™

By providing children who are at risk of hunger with a bag of nutritious food over weekends and breaks throughout the school year, the Backpack Program™ attempts to reduce hunger and helps children return to school ready to learn.

In 2013, 2,075 children at risk of hunger in 33 school districts were provided with a weekly pack of food.

A significant portion of the funds raised through the capital campaign were set aside to support the expansion of the Backpack Program™ to all 41 school districts in the Southern Tier region by 2014.

In 2014, 2,849 children in 41 school districts received packs every week, with a total of 85,056 packs distributed.

In the 2015-2016 school year, 2,800 children in 41 school districts received packs each week, with a total of 121,045 distributed.

In the 2016 school year, 3,341 children received 101,242 weekend and holiday backpacks

f. Focus on Healthy Foods

While the Food Bank has always been concerned with nutrition, it is able to distribute more fresh food and encourage clients to choose healthy options through several programs and initiatives.

- Kids’ Farmer’s Market
The Food Bank distributes fresh fruits and vegetables, farmers’ market style, to children at Summer Food sites, and in 2016 piloted year round Farmer’s Markets with two afterschool programs in Steuben County. Children are provided with recipes along with the produce.
- Just Say Yes to Fruits and Vegetables
Staff nutritionists prepare and demonstrate healthy recipes at local agencies and provide practical nutrition information and cooking tips featuring fruits and vegetables.
- Healthy Harvest Program
Locally-grown fresh produce is available at Mobile Food Pantry distributions and to partner agencies. The Food Bank has negotiated contracts with local farmers to acquire locally-grown produce at set prices. This helps the farmers and boosts the local economy – bringing fresh fruits and vegetables to Food Bank clients, many of whom find fresh produce too expensive to purchase.
- Nutrition Policy for Acquisition
On July 1, 2016, the Food Bank adopted a nutrition policy for acquisition that restricted the distribution of soda, energy drinks and candy. This policy allowed the Food Bank to focus its efforts on soliciting donations of healthier options.

5. Education and Advocacy

Education and advocacy on hunger issues has always been an important part of the mission of the Food Bank. During this time period, highlights of this activity have included:

- In 2013, 1,336 youth from 34 area groups participated in hunger education activities.
- In 2014, the agency gave priority to publicizing the study released by Feeding America – “*Hunger in America 2014*” which showed that 1 in 4 residents in the Southern Tier was impacted by Food Bank services. The agency also hosted events at the Food Bank including announcement of a bill by Congressman Tom Reed and a visit to the Food Bank from U.S. Senator Kirsten Gillibrand. In September, the agency kicked off annual Hunger Action Month activities by hosting its inaugural Legislative Breakfast attended by more than 30 community leaders.
- In 2016, several agency representatives attended the annual Anti-Hunger Policy Conference in Washington D.C. hosted by Feeding America and the Food Research & Action Center (FRAC).. As previously indicated, through a two year advocacy capacity building grant from Feeding America, the agency created a new Advocacy and Education Department, combining Advocacy, Hunger Education, Community Organization and SNAP Outreach activities into a single department, allowing the agency to further sharpen its focus in these areas.
- As previously indicated, in 2016, the Board established an Ad Hoc Advocacy Committee chaired by Board member Mark Bordeau, which may become a Standing Board committee. Also previously mentioned

was the establishment of a Speakers Bureau through which food pantry clients are trained to become more effective advocates.

With the vision and leadership of Natasha, and the diligent work of Randi Quackenbush, Lyndsey Lyman and others, advocacy activity will only be strengthened in the future.

J. CATHOLIC CHARITIES OF WAYNE COUNTY

1. Introduction

The time period described here was a very exciting time for Catholic Charities of Wayne County. The Board remained strong with stable leadership and the addition of several new members. A major Board activity was organizing the agency's 10th anniversary celebration, held in September, 2014. On the staff level, there was a change in the Executive Director position, but key program staff continued their outstanding performance. During this time, some existing programs were expanded, and new programs were added, especially a major Federal government grant, which literally doubled the size of the agency and enabled the agency to move into new headquarters. Efforts continued to connect with parishes and support the advocacy work of the Diocesan Public Policy Committee.

2. Board Leadership

Throughout this entire time period, the Board was led by veteran Chairperson Carmen Pagano, who had served as Board Chairman since 2005. Carmen had been instrumental in the transition process in the early days of the agency, as Catholic Family Center programs in Newark, some Finger Lakes Catholic Charities programs and LaCasa were brought together to form the core of the newly created Catholic Charities of Wayne County. Carmen, a retired school principal from the Pal-Mac district, had strong community connections, especially in Western Wayne County, and as a long-time member of the Catholic Family Center Wayne County Advisory Committee, was an effective bridge in helping to bring together the disparate elements that formed the new agency.

In this time period, Tom Briggs served as Vice-Chairman, Jean Lindenhovius and then Alan Mallette served as Treasurer and Elena Kiley and then Peter Dohr served as secretary.

A number of Board members made significant contributions to the agency. Jean and Alan provided close oversight to the agency's finances monitoring especially the financial situation of LaCasa. Ted O'Toole, who had joined the Board at the outset as a representative from Catholic Charities of the Finger Lakes, played a leadership role in raising funds for the Annual Bash, and during this time period replaced Anna Sapienza as the representative on the Diocesan Board from Catholic Charities of Wayne County. Marge Lash served not only as a Board member but also as a hands-on volunteer at the agency, attending to many important administrative matters. Deacon Jim Nail provided invaluable assistance in relation to parishes. Jack Skvorak envisioned and led the new College Scholarship program described below. Stan Weller constantly paid attention to important program issues. New Board members Emily Howard and

Jamie Halter brought new enthusiasm and energy to the agency, with Emily assuming the role of Board Chairperson, effective July 1, 2016. New members Larry DePauw and Father Jeff Tunnicliff joined and strengthened the Board.

In addition to the important responsibilities of selecting and overseeing the work of the Executive Director (as described below) and financial oversight, the other two major Board responsibilities are visioning or strategic planning and fund-raising.

During this three year period, the Board built upon the strategic plan which it had adopted in 2012, facilitated by the Ad Council of Rochester. It did so through Visioning Days held in January of each year.

Major goals established in the 2014 Visioning Process were:

- Expanding relationships with the County’s five Roman Catholic Parishes
- Running internal programs as efficiently as possible
- Refining existing programs
- Establishing a means of long-term stability of LaCasa
- Implementing focused program development initiatives

For 2015, it was agreed to maintain the first three goals adopted the previous year and to adopt three new goals:

- Assisting families with end-of-life issues
- Being a positive part of the new Comfort Care home under development in Newark
- Successfully launching the new Scholarship Program for the College Bound program

In January, 2016, in light of the awarding of the Federal grant described below, the Board focused on issues relating to the integration of the new program with existing services, and the need to find a new facility to house a staff which would double in size.

The Board’s other area of focus was fund-raising. In this time period, the agency maintained its four major annual fund-raising initiatives:

- The annual September Bash
- Second collections in parishes
- Annual agency appeal
- Annual appeal for LaCasa

The Board was heavily involved in the Bash which was held each year in early September at the Greystone Golf Course in Walworth. Particularly notable was the September, 2014, event at which the agency celebrated its tenth anniversary and honored Father Peter Clifford and Jim Hewes who had been so instrumental in the founding of the agency. While staff carried out much of the organizational and planning work, the Board (particularly Ted O’Toole) was instrumental in obtaining items for the silent auction and encouraging attendance among friends and colleagues. Efforts were made to enhance participation of school staff from

districts where the agency had professional staff presence. Proceeds from the event annually exceeded \$10,000.

The other area where the Board participated in fund-raising activities was in making presentations at weekend masses for the annual second collections. In particular, Carmen Pagano spoke in Macedon, where he was a parishioner, and Jim Nail spoke at the parish in Ontario where he was a Deacon. (Peter Dohr also spoke at a number of parishes: Newark, Lyons, Clyde, Savannah, Wolcott and Fair Haven.)

In all these ways, the Board remained a vital force in enhancing the work of the agency.

3. Staff Leadership

A major and exciting moment in the evolution of the agency came on October 1, 2013 when Deacon Peter Dohr assumed the position of Executive Director of the agency. In late July, Tim Sullivan who had served as Executive Director since February, 2008, submitted his resignation effective October 15th. Tim had done an outstanding job in his five plus years with the agency as chronicled in an earlier work. He and his wife Connie (who had been serving as Director of the Community Lunch program in Geneva for Catholic Charities of the Finger Lakes) decided to return to their roots in Tulsa, Oklahoma where four of their six children were living and the number of grandchildren was growing.

A Search Committee consisting of Carmen Pagano, Ted O'Toole, Jean Lindenhovius and Elena Kiley, along with Jack Balinsky, was quickly formed. At Jack's suggestion, the Committee decided to interview Peter as a possible candidate before organizing a formal search process. Jack had come to know Peter when he was appointed as a representative of his parish to the Parish Social Ministry Committee of Catholic Charities of Livingston County and subsequently to his Board. His understanding of Church, enthusiasm for the mission of Catholic Charities, and outstanding personal and professional qualities had become readily apparent to the entire Catholic Charities of Livingston County family. In addition to his qualifications and experience as a Deacon, Peter had had extensive administrative experience as Senior Vice President of Baldwin Real Estate Corporation, the management company of the DiMarco Group for more than nineteen years, and social work experience as a "Family Consultant" in private practice the previous two years. After the interview and due diligence in background checking, the Search Committee felt that he would be a "perfect fit" for Catholic Charities of Wayne County and there was no need to look further for a replacement for Tim. They recommended Peter's appointment to the Board and he was hired as Executive Director effective October 1, 2013. History has proved the wisdom of this choice. His leadership has facilitated the many accomplishments of the agency described below, contributions to Diocesan Catholic Charities (particularly utilizing his real estate background) and contributions to the Wayne County community.

His involvement in Wayne County community affairs have benefited both the agency and the community at large. He has established and maintains strong

relationships with key individuals in organizations which provide substantial funding to Catholic Charities: Paul Rubery (Bullis Foundation), Lori Banning (Rochester Area Community Foundation) and Josh McCrossen (DSS Commissioner). He has been a founding Board member and driving force in working toward the establishment of Laurel House which will be a two bed comfort care facility in Newark. He is a valued member in W3C (Wayne County Coordinating Council). He has been instrumental in advancing the Stop Hunger initiative created in 2016, Food Link support of the Newark Food Closet, the Mobile Food Pantry and the community garden developed collaboratively with Newark Rotary.

One reason that Peter has been able to make these contributions to the community is that he has been able to maintain, nurture and augment a very effective staff that works well together as a collaborative team. Space does not permit mention of all staff members, but several key individuals have made important contributions to the agency over a period of time.

Primary among these staff leaders has been Clinical Director Inga Rojas. Inga had been Director of the Wayne County Department of Catholic Family Center for a number of years before these services were integrated into the newly created Catholic Charities of Wayne County in 2004. She had served ably under Executive Directors Loretta Kruger and Tim Sullivan. Her leadership role in supporting Peter and staff has only increased in her collaborative partnership with Peter over the last three years. Although others contributed, she was the primary force in writing the grant application which brought the Thriving Families Program to the agency. She continues to serve as the Clinical Director for previously existing programs, and has now accepted this role in the Thriving Families Program. The agency would not be what it is today without her important contributions.

The agency has been well served over many years by other key staff. Sharon VanLiew (the “dean” of the staff, having served twenty-two years) continues to effectively manage the Early Intervention program. Peter Mares was the heart and soul of the LaCasa residence from its beginnings (See the author’s work “The Miracle of LaCasa”) until his departure in spring 2016. Alicia Diehl has done outstanding work in several different roles. She was Director of the College Bound program, and now serves as co-Director of the PARC program as well as working in the Early Intervention program. Scott Cameron ably directs the PARC program. Alison Huff has now for five years directed the highly successful College Bound program. Nadly Thompson was hired in fall 2016 to provide administrative leadership for the Thriving Families Program. Sandy Thomas, hired as an Administrative Assistant, is the glue who keeps the agency running smoothly. (She also joined Peter in visiting funeral directors to make known that Catholic Charities are available to assist grieving families.) As previously mentioned, Marge Lash serves not only as a Board member, but helps out also as a volunteer performing many administration duties.

4. **Direct Services**

a. **Introduction**

Described here are the evolution of five ongoing programs and two new or expanded programs during this time period. The ongoing initiatives are the various aspects of the clinical counseling program, LaCasa, the College Bound Program, the Wolcott Clothing Center and the PARC anti-bullying program. The new initiatives are various hunger/food related initiatives and the major new program, Thriving Families.

b. **Clinical Initiatives**

The three major clinical initiatives which have long been central to the work of the agency and its predecessor have been general counselling, early intervention and the PINS diversion program.

Throughout this time period these programs thrived and expanded. Major highlights were:

- In 2013, the Early Intervention program served 100 children and 200 persons participated in the general counselling
- In 2014, the agency secured a new \$60,000 grant for the CCIP (Child Counseling Intervention Program), as it was now called, from the Lyons Central School District
- Also in 2014, the agency suffered cutbacks from the United Way and was forced to cutback hours in one of the counseling positions
- In 2015, the agency received recognition from the Pal-Mac School District when it was presented the Robert Boehmler Community Partners for Education Award
- In 2016, the agency was able to maintain stable funding for these programs from the County and Bullis Foundation, and obtained a new contract from the Newark Central School District to provide counselling to its students. For the year, 140 children and their families were served in the early intervention program; 325 family members were served in the PINS program; 120 clients received general counseling.

c. **La Casa**

As noted previously, this temporary residence for migrant individuals and families was opened in 2005 on Maple Street in Sodus. Over the past eleven years, it has almost always been filled to capacity under the supervision of staff member Peter Mares, with an average length of stay of 50 days. Since a large percentage of residents have been undocumented persons, and therefore the program has not been eligible for government funding, sustaining LaCasa has required significant attention to fund-raising from foundations, larger individual gifts (generated largely by volunteer Tom McDermott who was instrumental in creating LaCasa) and primarily Catholic parishes.

Just prior to this time period, the Board, in addressing the financial situation, had adopted a policy that residents be asked to pay \$100/month as rent, but throughout this period that policy was implemented with only limited success. In 2013 and 2014, there was discussion about renovating the garage

to become an office so that the one room apartment which had been used as an office could be converted into living space, but that change has not yet been made.

In the last two years, the agency has made efforts to improve the physical facility, which has suffered from the wear and tear of occupancy with planned turnover, and deferred maintenance issues caused by lack of finances. In both spring of 2015 and 2016, Peter led fellow alumni volunteers from Holy Cross College to help “spruce up” the facility including inside painting. Much needed heating repairs were made in October. In early November, 2016, Peter worked with a spirited group of RIT student volunteers recruited by Alice Miller Nation, Director of Pastoral Care at RIT, to clean out much of the unwanted clutter (with a dumpster provided by Andy Hislop from Lecessee) that had accumulated over the years. At the end of 2016, the agency secured an \$8,000 gift to match funding from Pathstone so that a new roof could be made possible in 2017. Similarly, with hoped-for assistance from Lecessee, plans are underway for a complete outside painting job in 2017.

Funding difficulties have also affected staffing for LaCasa. When it became clear that Peter Mares’ position would have to be cut back at the end of 2016, coupled with some health issues, Peter left the agency in summer 2016.

Despite these funding maintenance and staffing issues in 2016, the agency served 18 families in 2016. It also took steps to revitalize the program for 2017.

d. College Bound

The College Bound program had been established when the organization was a Department of Catholic Family Center. It has continued successfully throughout the entire history of Catholic Charities of Wayne County. In this three year time period, under the leadership of Allison Huff, with continuing funding from the Women’s Foundation of Genesee Valley, it has continued to provide valuable service to assist first generation college students gain admission and financial assistance. In 2013, 100 high school students were served. In 2014, that number grew to 162 students in grades 6-12. In 2015 and 2016, a similar number of students were served.

At the suggestion of Board member Jack Skvorak, in 2014 the Board began raising funds to provide college scholarships for successful participants. Over a six month period, nearly \$8,000 was raised from Board members and other donors. Six \$500 scholarships were awarded for the fall 2015 semester, five of which were renewed for the spring 2016 semester, as these student recipients were successful in their first semester. In evaluating the program after its first year of operation, it was determined that keeping in communication with recipients was a significant logistical challenge for staff, whose primary mission was to help students gain college admission and the Board decided to discontinue the program.

Nonetheless, this initiative remains extremely important for the many families in Wayne County who do not have the background and experience to negotiate the college admission process.

e. **Wolcott Clothing Center**

Recall that Catholic Charities of Wayne County assumed responsibility of the Wolcott Clothing center in 2008 when faith-based volunteers felt they were no longer able to manage the then 20 year old initiative. As previously reported, a group of volunteers under the outstanding leadership of Jill lee had stabilized and grown the program to the point where 6,700 individuals were served in 2012.

Over the last 3 ½ years, under Jill’s leadership, with significant support from the Wayne County Community Endowment Fund, the program thrived and added two new initiatives. The first is the back-to-school backpack program to help families with limited resources ready their children for school. In 2015, 266 backpacks were distributed in August, and in 2016, 200 were distributed. The second new initiative was the holiday season winter coat drive sponsored in coordination with WACK radio. In 2014, this partnership received special recognition from the New York State Broadcasters Association.

Today, located at 12109 East Main Street, the center is open Wednesdays and Saturdays from 10 AM to 1 PM and on Wednesday evenings from 5 to 7 PM. In addition support from the Wayne County Community Endowment, financial support comes from numerous local churches and community organizations. Now the center annually distributes approximately 32,000 free clothing items to an estimated 3,300 households. Staff and volunteers also provide a friendly environment to its visitors.

f. **Position Altitude Responsible Citizenship (PARC) Anti-Bullying Program**

Given the national and local attention given to the problem of bullying of students, including cyber-bullying which resulted in several nationally publicized resulting suicides, the Bullis Foundation provided the agency a \$75,000 grant in 2012 to establish this program in schools in Palmyra and Macedon. The specific purpose of the program was to raise awareness and provide education for both students and parents about the dangers of bullying. Among the programs developed during this time period were the establishment of “safe zones” in community businesses where bullying would not be tolerated. Other programs included trainings for both students and parents on the value of anonymous reporting and dealing with bullying behavior. Individual counseling has also been offered. In 2014, the agency received an additional \$58,500 to expand the program to other schools. In 2016, a \$7,500 grant was obtained for the program from the Palmyra School District.

g. **Hunger/Food Related Initiatives**

Recall that the agency had begun in 2008 partnering with Rotary in the operation of a Food Service program providing quality food at lower prices to

needy individuals. In 2009, the agency, in cooperation with Food Link, opened a Food Pantry in what had been the garage at the agency headquarters on East Union Street. Through these programs, in 2012, the agency had provided more than 25,000 food items to 1,700 adults and 950 children. Yet, it became clear, that without staff dedicated to this responsibility and sufficient administrative funding, this model of service provision was not sustainable in the long term.

With the arrival of Peter Dohr in October 2013, several exciting new initiatives were developed in the hunger food area:

- In 2014, the Food Pantry was consolidated with the Newark Food Closet, aided by a grant.
- In 2015, 4,200 persons were served.
- In 2015, the agency played a lead role in promoting the county-wide Stop Hunger Program
- In 2015, the Mobile Food Pantry program was brought to Newark, serving 200 persons on each of its visits
- In 2015, also, a Community Garden was established in Newark in conjunction with Rotary
- In 2016, 2,200 persons were served through the Mobile Food Pantry and 2,500 through the Newark Food Closet

h. Thriving Families Program

The most significant development for Catholic Charities of Wayne County in its short twelve year history was the awarding in September, 2015 of an \$8 million five-year Federal grant from the Administration of Children and Families Healthy Marriages and Responsible Fatherhood Program. With considerable assistance throughout the end of 2014 and the beginning of 2015 from grant consultant Jay Roscup, but with Inga Rojas the primary author of the grant proposal, with the assistance of Wayne County Partnership for Strengthening Families, a proposal was submitted through which Catholic Charities would serve as the lead agency for the Thriving Families Program.

The purpose of the program is to reach over 1,500 youth and adults each year with a comprehensive program that combines the foundational research base of proven curriculum with the individual responsiveness of a case management approach. The program had a 9 month ramp-up period from October 2015 to June 2016 and then went “live” on July 1, 2016. Much has already been accomplished. The program is developing a public marketing campaign that will build help to build client base and name recognition for enrollment into Healthy Marriage & Relationship courses. Supported and encouraged by the Wayne County Partnership for Strengthening Families, CCWC has activated a broad support network through which at least 640 individuals annually will receive Case Management. Both Case Managers and Educators are embedded throughout the communities of Wayne County in local Head Start sites, schools, the One-Stop Career center, County jail, and libraries to accept and generate referrals. Prior to Case Management, participants receive supportive assessments that utilize a strengths based approach to match services to participant needs. Whether in High Schools,

in factory break rooms, or at the local library, Healthy Marriage and Relationship Courses are being taught with fidelity by Master's Level staff using the "PREP" (Prevention Relation Enhancement Program) curriculum for adults and the "Connections: Dating and Relationships" curriculum for High School Students. This multi-faceted approach is aimed at specific populations in Wayne County including 18-24 year olds, at-risk youth, the unemployed and underemployed, and our Migrant Farm Workers.

The implementation of this program has obviously had an enormous impact on the agency. Literally, as the program has evolved over the last year, with the planned hiring of 13 new staff persons (almost now completed), the agency has doubled in size. (The 2017 operating budget is \$2.6 million.) This significant increase raised some questions from experienced business leaders concerned about the risks of rapid growth, but these fears were addressed when it was pointed out that the \$1.6 million growth is only 2% of the Diocesan Catholic Charities budget, and Wayne County Catholic Charities has the support and assistance of centralized back office services (Finance, Human Resources, IT).

Obviously the expansion also meant that Catholic Charities had to find new office space. Here, too, the support of the Diocesan Catholic Charities family was invaluable. Executive Director Mark Greisberger and Providence Housing Development Corporation provided invaluable expertise and assistance. Providence purchased and now rents to Catholic Charities a very solid and well-located building at 180 East Union in downtown Newark. The building was blessed by Bishop Matano at a ceremony held in November, 2016. Peter did an extraordinary job in negotiating termination of the previous lease, the purchase agreement and the moving process, all at the same time as administering ongoing programs and engaging in the many other community activities described here. It is obvious that Peter has also more generally made possible the evolution of the Thriving Families Program through which 220 persons were served by the end of 2016.

5. Advocacy and Parish Social Ministry

As indicated earlier, these two elements of the agency's mission statement have for the last two years been among the agency's top priorities. They have been carried out both by Peter and by various staff persons who have been hired as "Justice and Peace" coordinators.

Given his familiarity with parish life through his experience as a deacon, Peter has made great strides in strengthening relationships with the five Catholic parishes in the community. A primary relationship, because of geographic proximity and the opportunity for program collaboration has been St. Michael's in Newark, where the support of pastoral associate Pat Albrecht has been most helpful. Peter has also spoken at weekend masses at a number of parishes, informing parishioners of the work of Catholic Charities and encouraging referrals and collaborative activities. In 2014, he spoke at St. Michael's. In 2015, as part of the August second collection appeal, he spoke again at St. Michael's, St. Joseph the Worker in Lyons, Clyde and Savannah and Blessed

Trinity in Wolcott and Fair Haven. Peter also met with Father Jesus and Sister Lucy from the Marion mission church to discuss collaboration.

In this time period, Peter was assisted by “Justice and Peace coordinators:” Deacon Jim Nail, who served on a very part-time basis, and beginning in June, 2016, Deacon Greg Kiley, a parishioner at St. Joseph the Worker, whom the agency shares in this role with Catholic Charities of the Finger Lakes.

Among the many important activities carried out during this time:

- Regular meetings with Assemblyman Bob Oaks
- A special meeting discussing the Federal application with Congressman John Katko
- Coordinated distribution of local proceeds of Rice Bowl program to participating parishes
- Coordinated distribution of the Bishop’s Heating Fund to parishes
- Participated in the work of the Diocesan Public Policy Committee

K. CAMP STELLA MARIS

1. Introduction

This time period was for Camp Stella Maris a time of stability, attention to mission, significant focus on maintaining and upgrading the physical plant, and growing both campership funding and year round programming. The camp was blessed with a succession of strong Board leaders. Stability and outstanding leadership was provided by year-round staff, despite turnover in the Camp Director position. All program initiatives continued, with a modest rebound in resident camp enrollment to near capacity. Camp leadership continued to reach out to church groups and other agencies to enhance year-round programs.

2. Board Leadership

Board officers during this time period were:

2013

President	Catherine Gueli
Vice-President	Kevin Fitzpatrick
Vice-President	Kathy Olbrich
Treasurer	Al Schum
Immediate Past President	Daniel Dey

2014

President	Kevin Fitzpatrick
Vice-President	Kathy Olbrich
Vice-President	Al Schum
Treasurer	Eileen Heizyk
Immediate Past President	Catherine Gueli
Secretary	Christopher Marinucci

2015

President	Kevin Fitzpatrick
Vice-President	Al Schum
Vice-President	Kathy Olbrich

Treasurer	Eileen Heizyk
Secretary	Christopher Marinucci

2016

President	Kathy Olbrich
Vice-President	Steve Nazarian
Vice-President	Christopher Marinucci
Treasurer	Al Schum
Immediate Past President	Kevin Fitzpatrick
Secretary	Jennifer Shoemaker

While all these leaders made significant contributions, special mention must be made of Daniel Dey, who served his last term as an officer in 2012. Beginning in 2007 with the transition to a new Director, Dan encouraged the Board to embrace their governance role, enhanced the role of committees, and strengthened policies and procedures.

The major responsibilities of the Board are to hire and work with the Executive Director, set the overall strategic direction for the agency, and work with staff on fund-raising efforts.

As described below, during this time period, the Board benefitted from its excellent decision in 2008, together with Diocesan Catholic Charities Director Jack Balinsky, to hire John Quinlivan as Executive Director.

During this time period, the Board gave considerable attention to formulating the strategic direction of the Camp.

As articulated in the 2015 Annual Report, updated mission, vision and values were

OUR MISSION

The **mission** of Camp Stella Maris is to create a fun Christ-centered, safe caring environment and experience, fostering continued spiritual, physical and emotional growth for a diverse group of campers of all ages. This is accomplished by promoting acceptance of self and others through the social, spiritual, recreational and educational aspects of the CSM experience. CSM accomplishes this through sound financial management, trained and committed staff and community support. CSM works with community groups and citizens to fund scholarships to ensure opportunities for all to benefit from the CSM experience.

OUR VISION

During the next four years CSM will be regionally recognized as the preeminent camp experience by campers, parents, staff, alumni, supporters, and the camping industry. We will accomplish this while maintaining our long-standing traditions and a heritage of faith based values.

OUR VALUES

Spiritual, Magical, Inclusive, Safe & Caring, Creative, Community, Good clean fun, Respect, Freedom, and Responsibility

The Board also gave considerable attention to maintaining and upgrading the camp's physical plant.

In 2013, several improvements were made:

- The roofs of two cabins and the medical center were completely replaced.
- The Russer House was renovated to create a new reception area.
- A garage was built to house Camp vehicles.
- The foundation of Russer House was repaired in preparation for a major renovation to be undertaken in 2014.
- In memory of Garry Darrer, a former member of the Board and camper father, CSM added a new archery pavilion to shade campers while they engaged in activities.
- The aging zip-line was repaired.
- Additional floating docks were added to extend usable waterfront space.
- Two new inflatables were added – a huge, floating obstacle course and a giant slip and slide.

In 2014, major developments included:

- A feasibility study was conducted with the conclusion that Camp Stella Maris should delay construction of a new Spiritual Center in favor of focusing on donor development.
- Bunks in many cabins were replaced and several cabin roofs were updated.
- Russer House renovation was completed with the addition of a beautiful year-round porch.
- Many outdoor cosmetic improvements were made.

In 2015, major developments included:

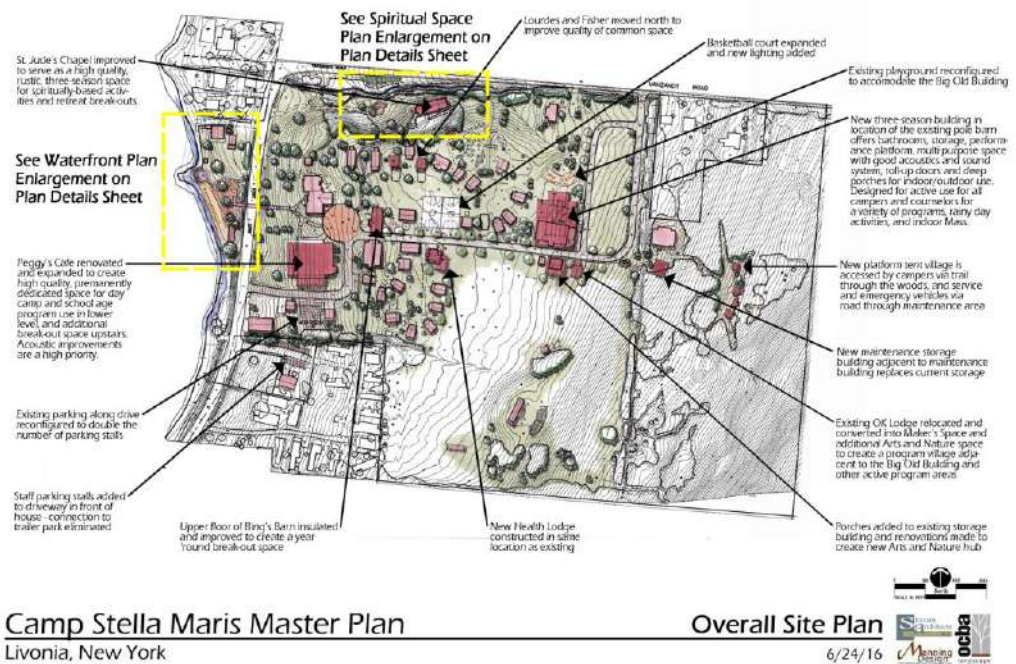
- A Facilities Audit was conducted to evaluate all existing facilities in order to develop five and ten year plans for future construction and renovation projects. The specific purposes were to evaluate the current state of elements of each facility (structure, mechanics, etc.) and the life expectancy of all facilities and elements.
- The most pressing needs, cabin foundations and roof bracing, were immediately addressed.
- Work was begun with an outside consultant to engage staff, Board and key stakeholders in a process to develop a 10 year Master Plan.

In 2016, through the lengthy process which led to the Master Plan, the Camp prioritized its list of needs. The draft Master Plan document enumerated these priorities:

- Large Space
- Spiritual Space
- Bathrooms
- Waterfront

Outdoor Program Space
 Parking
 DG/ASP Designated Space
 Companies
 Drainage Issue
 Acoustics of Peggy's Café
 Health Center

Details available in the Master Plan describe more specifically the overall site plan, the plans for enlarging the waterfront, spiritual space plan enlargement, draining details, plans for building a treehouse and a floor plan for the Health Center.



In light of the Master Plan, property improvements in 2016 included:

- The Quinlivan Archery Range was dedicated in honor of Executive Director John Quinlivan's father, Richard Quinlivan.
- Cabin F & G, one of the camp's oldest cabins, was renovated.
- Cabin Evening Star's foundation was replaced.
- St. Michael's Tent Village was constructed on the east side of Camp. (This facility will allow continuation of the importance of camping and tenting. In the 1930's, campers and counsellors would hike to St. Mary's Mission, the former Divine Word seminary on Hemlock Lake. This tradition continued well into the 1980's. In later years CSM Leadership campers would set up a second overnight site in the CSM woods, and enjoy a final night by the fire. In honor of the great history of tent camping at CSM, leadership chose to name the new tenting village Saint Mike's Tent Village. The trail leading to the tent village was named Hemlock Trail, to commemorate the wonderful hikes to Hemlock Lake.

Each week, campers have the option to spend a night at St. Mike's Tent Village. To this point, three tents have been named.

- * Double K – in honor of the Kanaley and Keefer families.
- * Albet – in honor of Allie and Brittany Day by their parents.
- * North Star – dedicated to campers and counsellors by a large group of staff alumni who call themselves Tuesday Night Movie Club.)

Beside its work in the planning arena, the Board also organized and contributed to ongoing fund-raising efforts. Throughout the time period, the two major funding events were the CSM Golf Classic and the Annual Appeal. In 2013, the Golf Tournament was successful and the Annual Appeal achieved a record amount of funding. In 2014, the sixth Annual CSM Golf Classic had a full field of golfers and raised more than ever before. In late 2013, the decision had been made to cancel the Fall Social because of dismal turnout on a rainy night. In 2014 it was replaced by Camp Stella Maris Casino Night, which had an excellent first year. In 2015, both events were successful and the Camp had made great progress in expanding its donor lists through hiring a Development Coordinator to develop the Annual Campaign. In 2015, \$130,891 was raised. In 2016, \$223,875 was raised including an \$80,000 bequest. The Golf Tournament had a full field of 144 golfers. Casino Night sold out with 140 guests.

3. Staff Leadership

As described in a previous work, through the leadership of Board Chairperson Dan Dey, the Board and Jack Balinsky, John Quinlivan had been hired as Executive Director in 2008. He had worked the previous twenty years at GEVA Theatre in Rochester, including the last six as Managing Director. He had been deeply touched by his relationship with Father Jim Hewes, his pastor in Rush, and had become interested in the Camp as a way to live out his faith professionally with the guidance and support of the Board. It has been his passion and leadership that has driven the Camp to return more closely to the vision of its founder, Father Gerry Lambert and Gene Hudson. Three overarching themes have characterized his tenure over his eight years at the Camp, including this time period:

- More emphasis on service to the poor
- Enhanced spirituality program
- Focused effort to become an integral part of the youth ministry activities of the Diocese.

During this time period, John continued to be able to attract and support committed leadership staff. Adam Bell served as Camp Director from 2010-2014. As Director, Adam embraced process improvement, improved staff training and guided Camp into the social media age. One highlight of his tenure was the development of a musical program, Popular Peninsula, which raised over \$15,000 for the campership program through CD sales. Molly Shore served as Camp Director for 2015 and 2016. Molly brought the concepts of autonomy, mastering and connection to Camp programming. Jennifer Meyers was hired as Camp Director in late 2016. She had served on seasonal staff for 14 years in various roles including Head Counsellor.

During this time period, key summer leadership was provided:

- In 2013, by:
 - o Katie Jenkins – Head Counsellor
 - o Kate Maher – Program Director
 - o Tricia Blanchard – Camp Operations Director
 - o Alice Miller Nation – Spiritual Director

- In 2014,by:
 - o Katie Jenkins – Head Counsellor
 - o Kate Maher – Program Director
 - o Alice Miller Nation – Spiritual Director

- In 2015, by:
 - o Jessica Tette – Program Director
 - o Allie May – Head Division Director
 - o Jack Green – Assistant Program Director
 - o Alice Miller Nation – Spiritual Director

- In 2016 by:
 - o Shannon Gross – Head Counsellor
 - o Tyler Shemon/Stacie Maiorani – Program Directors
 - o Allie May – Head Division Director
 - o Alice Miller Nation – Spiritual Director

And, of course, no mention of leadership staff is complete without mention of Armando Toppi, who has served on staff more than 40 years. In 2007, in recognition of his outstanding service, Mondo Cabin had been created. In 2000, he had served as Camp Director. In this time period, he served as Ballfield Director, as well as Archery Specialist in 2016.

At the end of 2016, the year round staff were:

John Quinlivan	Executive Director
Jennifer Meyers	Camp Director
Chris Viscardi & Greg Francati	Group Services Directors
Karen Bell	Office Manager
Samantha Carroll	Marketing Director
Diane Ackerman	Registrar/Camp Consultant
Laura Panipinto	Camp Receptionist
Dan Vallone	Facilities Manager
Ryan Ellison	Grounds & Building Maintenance
Tara Allison	Cleaner

The work of the summer staff is described more fully in the detailed description of program activities which follows.

In discussing the work of staff, it is important to mention that the Camp is fully committed to the principles established by the nation’s Bishop in the 2002 “*Charter for the Protection of Children and Young People.*” All employees,

regardless of how long they have been employed must pass an annual background check, complete *Creating a Safe Environment* training, and sign a Code of Conduct. Campers who participate in Leadership Training Programs (LIT and CIT) also receive age-appropriate safe environment training from Camp staff.

4. Program Activities

a. Summer Camp Programs

Resident Camp			
Campers ages 7-15 are welcomed into the Camp Stella Maris community for eight, week-long sessions from late June through mid-August. Each themed week is packed with activities that promotes individual growth within a Christian community. The caring, supportive staff fosters a sense of confidence and cooperation among the campers that help them challenge themselves spiritually, emotionally, and physically. The result is a truly extraordinary community.			
Participants			
2013	2014	2015	2016
2,023	1,942	1979	2,049
Leadership in Training			
15 year-olds participate in a comprehensive 2-week camp experience filled with interactive workshops that explore leadership styles and applications and include community service projects that benefit children in need.			
Participants			
2013	2014	2015	2016
75	80	83	87
Counselor in Training			
16 year-olds spend one week working collaboratively in hands-on activities that prepare them for the work of a counselor, then a second week are placed into cabins under the supervision and guidance of senior counselors where they gained valuable lessons from practice under very real circumstances.			
Participants			
2013	2014	2015	2016
80	86	91	64

Day Camp			
Campers participate in the Monday through Friday program from 9am to 5pm. They have the opportunity to experience many of the same activities as the resident campers, such as swimming at the waterfront and eating lunch inside of Peggy’s Café. But, they also have access to unique programs that fostered a special Day Camp community. New to some weeks in 2015 was a one night sleepover.			
Participants			
2013	2014	2015	2016
350	382	387	397
4 Day Stay			
Campers join our Resident Camp in a shortened camp session. Created to offer a shorter, lower cost option, more than half of the participants choose to extend their stay for the full week.			
Participants			
2013	2014	2015	2016
79	41	116	99
Overnight Experience			
6-10 year-olds participate in our 1 and 2 night Overnight Experience program. Created so that first-time campers could “try out” overnight camp, these campers experience all the benefits of Resident Camp.			
Participants			
2013	2014	2015	2016
145	135	92	72

Charles M. Bayer Campership Program

Needs-based scholarships for camp-camperships are provided to families so that kids can attend Resident, Day and Family Camps. Each year, Camp Stella Maris combines a portion of program fees with donations from individuals, foundations and corporations and funds raised through special events to fund camperships for kids who would not otherwise be able to attend camp.

	Participants			
	2013	2014	2015	2016
Campers	312	301	313	340
Total Funding	\$146,544	\$152,000	\$152,000	\$164,000

In 2015, an example of the types of campership by request was:

Individual Requests	146
Parish	111
Individual Sponsor	23
Department of Social Services	11
Catholic Church	9
Livonia School	9
Other Not-for-Profit Agencies	4

b. Year Round Programs

Camps for Kids		
Campers participate in 5 unique camping experiences throughout the school year: Camp in the Cold, Winter Ski Camp, Christmas at CSM offer young campers great programming in the colder winter months while Teen Leadership Camp, LEAD, and LIT Reconnect give another opportunity for our older campers to learn new leadership skills		
Participants		
2013	2014	2015
156	144	170

Family and Adult Camps		
Adults and children enjoy the opportunity to build stronger bonds with each other through participation in fun camp activities. 2015 Programs included Mommy and Me, Daddy and Me, Family Camp Weekend, Women’s Getaway Weekend, and Camping with Seniors.		
Participants		
2013	2014	2015
93	110	123

ABLE			
Individuals from 36 different groups participate in our Adventure Based Learning Experience (ABLE) Program. Public and parochial schools, colleges, parishes, clubs, organizations, corporate groups and community agencies take advantage of the opportunity to improve problem-solving, leadership, and communication skills.			
	2013	2014	2015
Groups	58	42	36
Participants	2,245	1,627	1,500

School Age Program		
Students from the Livonia School District participate in this program. In addition to afterschool care, this program also offers full and half-day holiday vacation camps. Our highly skilled staff offer homework help, programming, and a safe and caring environment.		
Participants		
2013	2014	2015
5	35	40

Facility Rentals			
Camp Stella Maris continues to be a sought-after facility for youth group retreats, college trainings, and church functions from mid-August to Mid-June. Well-maintained accommodations fit a variety of budgets, and CSM remains committed to offering our guests a caring and resourceful staff to support their events.			
	2013	2014	2015
Organizations	55	40	40
Groups	77	54	54
Participants	3,520	3,007	3,577

L. PROVIDENCE HOUSING DEVELOPMENT CORPORATION

1. Introduction

The time period 2013-2016 was a time of major transition for Providence Housing Development Corporation. There was a major turnover in Board membership because a number of long-time stalwart Board members reached their maximum time of service and left the Board. A new group of members from diverse backgrounds stepped into important leadership roles. With the resignation in spring 2013 of Monica McCullough, who had served as Executive Director since December, 2005, the Board determined to restructure the role of key staff in the light of the growth of the agency. While sound in concept, this new approach proved difficult to accomplish and led to financial and programmatic challenges over a six month period in late 2014 and early 2015. The Board considered various options for moving forward and hired a new Executive Director on March 10, 2015 to lead the agency on a “New Way Forward”. Project development activities, which had been difficult challenges in the previous two years, were expanded dramatically in the remainder of 2015 and 2016. Happily, the property management function, under outstanding staff leadership, remained the solid backbone of the agency’s work, with Providence retaining its reputation as an excellent property management company. Given the new national and community-wide focus on issues of homelessness, and particularly challenges from the very high risk population who for many reasons did not utilize the county-funded shelter system, Providence took a lead role in administering grants to reach out to this population. By the end of 2016, the agency had been stabilized, was sound financially and was pursuing existing opportunities to fulfill its mission “to strengthen families and communities by creating and providing access to quality affordable housing enriched by the availability of supportive services.”

2. Board Leadership

Throughout this time period, Jack Balinsky, Diocesan Director of Catholic Charities, continued to serve as Board Chairperson. Lisa Passero, Chief Financial Officer for the Diocese, continued to make valuable contributions as a member of the Finance Committee and in relationships with the Diocese. Long-time Board members Rick Herman, Executive Director of the Rochester Home Builders Association, continued his service as Treasurer, and Charles Philip from Corning, Inc. did likewise as Secretary of the Board.

Providence bid a fond farewell to several members who had been essential to the evolution of the organization over the previous decade: Karyn Herman, Jean Lindenhovius and Maureen McCarron retired in 2013; Lloyd Theis, David Tang and Jackie Ortiz retired in 2014; Father Jeff Tunnicliff and Sister St. Luke Hardy, SSJ retired in 2015; as did Rick Rossettie, who had served as Vice-President, in 2016.

New members joining during this time period came from diverse backgrounds and brought new energy to leadership of the organization. Lynette Robinson from NeighborWorks Rochester joined the Board in 2013, as did Dorothy Hall, Executive Director of the Plymouth-Exchange Neighborhood Association in 2014. They both brought an important urban neighborhood perspective to the

work of Providence. A large class of new members was elected in 2014. In an effort by Providence to strengthen relationships with Catholic Charities agencies as potential service providers for Providence projects, Peter Dohr, Executive Director of Catholic Charities of Wayne County, and Lori VanAuken, Executive Director of Catholic Charities Community Services, were elected as Board members (Lori regrettably resigned in 2016 because of the press of other responsibilities.) To strengthen relationships with the Diocese, elected to the Board were Father Bob Ring, pastor of St. Louis Church in Pittsford, and Father Joe Hart (who had been instrumental in the creation of Providence more than twenty years previously), pastor of Our Lady Queen of Peace and St. Thomas More parish. Real estate expertise was brought by new members Daniel Saperstone from the Cabot Group and Jeff Smith from Westfall Associates.

Elected to the Board in 2016 were Ronald Hughes, a staff member of the Center for Youth, Kathleen Karl, an attorney at Underberg & Kessler, and Sister Kathryn Wahl, who had served as Director of Faith Formation at St. Kateri Drexel parish.

Three major responsibilities of a not-for-profit Board are setting strategic direction for the organization, hiring and working with its Executive Director, and fund-raising. Board efforts in regard to the first two responsibilities are detailed in the next section under staff leadership. Here are described the Board's fund-raising activities during this time period.

In its approach to fund-raising, since its inception, given the nature of its work, Providence had chosen to take a somewhat different approach to philanthropic fund-raising than other Catholic Charities agencies. Rather than organizing a series of annual events, Board and staff leaders had chosen to organize major events at five year intervals. Providence had celebrated its fifteenth anniversary in 2009 at the Rochester Yacht Club, at which Mark Greisberger had been presented the Bishop Clark Award.

The major fund-raising event, with a goal of raising \$100,000 for pre-development costs, was the 20th anniversary celebration. On September 18, 2014, over 200 community members, dignitaries (including Bishop Matano), staff and residents attended Providence's 20/20 Vision Gala at Artisan Works in Rochester to celebrate past successes and focus on the future. WHAM-13 Anchor and Associate News Director Don Alhart was the Master of Ceremonies and, with Executive Director John McDermott, delivered a short program on the accomplishments of Providence since 1994, and detailed the growing shortage of affordable housing. With support from major contributors Lecesse Construction, Atlas Construction, Bank of Castile, Barrett-Greisberger LLP, Five Star Bank, Paris-Kirwan Associates, Stantec Consulting and SWBR Architects and many other vendors and silent auction contributors, the agency nearly achieved its \$100,000 fund-raising goal.

At the gala, the new "Maggie Bringewatt Affordable Housing Award" was announced and Providence honored Maggie and the first two recipients of this award. Under Maggie's guidance as the first Executive Director of Providence,

Providence developed its first nine projects and organized a successful property management team.

Both award winners had been tremendous assets to the affordable housing community, had dedicated years of resources, and continued to be committed to reducing the shortage of affordable housing and have been valuable partners of Providence. In receiving the award, Andy Hislop, President and CEO of Lecess Construction Services said:

“We are committed, more than ever, to assisting in the development of affordable housing and providing innovative solutions to meet the need. It’s about human dignity. Everyone deserves a safe, affordable place to live.”

Mike Spaan, CEO of Atlas General Contractors said upon receipt of the award:

“It gives Atlas Contractors great pleasure to build such quality housing for people in neighborhoods throughout the city. We love to see the expression when families walk through the front door to their new dream home, which they never thought would become a reality. Thanks to Providence Housing for making their dreams come true!”

Besides these events, over the years, and during this time period, Providence raised modest sums of support as a United Way Donor Designated agency, by participating in ROC the Day, through contributions from Board members, and by small specific-purpose funding initiatives. One such initiative in 2015 was the successful effort to raise \$2,000 to make possible installation of solar panels on the roof of St. Salome’s Senior Housing Project.

3. Staff Leadership

When Monica McCullough, who as the second Executive Director of Providence, from 2005 to spring 2013, announced her resignation, the Board decided it was time to take a significant step in the evolution of the organization. With the funding of and significant effort developing the Holy Rosary project, which would be opened in fall, 2013, the decision was made to divide what had been two major responsibilities carried out by the Executive director (development and administration) into the specific positions, Executive Director and Development Director. Despite a lack of experience in developing affordable housing, Deacon John McDermott was hired as Executive Director July 1, 2013. While John had spent his career in the for-profit sector, he was well known in Diocesan circles for his extraordinary three month effort in fall 2005 establishing and coordinating a Diocesan partnership with the Archdiocese of New Orleans in the wake of Hurricane Katrina, as well as his work as a Deacon in parishes and his leadership in Urban Ministry planning. In fall 2013, John hired Justin Rudgick who had had a successful career at Housing Visions in Syracuse as Development Director. Helen Bianchi, who had been ably serving as Director of Asset Management, Cathy Vail, who had been hired as CFO in

spring 2013, and Debbie Bilotta, who had been hired as Monica's Executive Assistant in 2010, completed the staff leadership team.

From July 2013 until the end of 2014, this new leadership team had numerous successes, but also experienced significant challenges. As described below, they brought to successful conclusion a development relationship with Conifer for the Biltmore Crossing project in Horseheads, and the implementation of a Federal Home Loan Bank grant for Son House, as well as finalizing the very complex closing process for the Holy Rosary project. John and staff also did an excellent job in improving administrative processes in the growing organization and project management continued to be outstanding.

It had become clear, however, by early 2014, that there was need for developing other major projects. The development of the Holy Rosary project had taken a significant amount of Monica's time (a major factor in the decision to split the Executive Director position into two positions), and there were no major projects in the pipeline. In 2014, two major projects under consideration: creation of a second St. Andrew's type facility on the campus of the Pastoral Center, and a proposed second collaboration with East House (Paul Wolk Commons was opened in 2012) did not come to fruition.

The lack of projects in the pipeline and growing concern about the financial stability of Providence led to a Board Strategic Planning session held on October 10, 2014. Based upon their significant work planning for the session, John and Cathy advised the Board that for Providence to continue with its current organizational model, there was need for one or two tax credit development deals annually and an infusion of capital to carry PHDC until development fees were received in late 2015 or in 2016. Jack advised the Board of opportunities provided by the significant in availability of funding for affordable housing through the work of the Medicaid Redesign Team. He noted the infusion into the State of \$8 billion through a Medicaid waiver granted by the Federal government, which included substantial funding for affordable housing. The Board decided upon two goals to be achieved in the following three months: submission of a tax credit project in December, 2014 and agreement of capital infusion to Providence by either Lecesse Corporation or RUSH Corporation.

While the opportunity for cash infusions continued over the next several months, the organization was not able to develop a tax credit proposal by December 2014, nor was there any realistic project on the horizon. Accordingly, both John McDermott and Justin Rudgick resigned from the organization at the end of December, 2014.

There ensued a three month transition period which was to lead to a changed and revitalized organization. Board President Jack Balinsky assumed oversight of the organization, ably assisted by Helen Bianchi and her staff, Cathy Vail (until her resignation at the end of January, 2015), and Debbie Bilotta.

Enter Mark Greisberger. Following in his father's footsteps, Mark an attorney in private practice, had been a very significant volunteer in supporting church

activities since the late 1970s when he served as a member of the Board of Genesee Settlement House. With the reorganization of Diocesan Catholic Charities in the mid 1980's, as described fully in the author's previous work "Catholic Charities in the Diocese of Rochester 1910-2010," Mark had assumed a leadership role on the Diocesan Board, working closely with Diocesan Director John Firpo. Mark had been introduced to Jack by long-time Catholic Charities staff leader Paul Pickering, and joined their Board when Catholic Charities Community Services was established in 1992 as a separate division of Diocesan Catholic Charities. Also involved in community activities, including Bishop Sheen Ecumenical Housing Foundation, Mark became an advisor to Jack as Jack sought to implement the recommendation in the Diocesan Board Strategic Plan adopted in 1992 that Catholic Charities play a greater role in development and management of safe affordable housing for low-income individuals and families, senior citizens and the special needs population. It was this advisory role in 1993 and 1994 that led Mark to become the "Godfather" of Providence and a founding member of the Board. The creation of Providence and Mark's key role are described in detail in the author's previous work "A History of the Providence Housing Development Corporation 1994-2009."

While Mark had been a Board member of Providence since its inception (except a one-year hiatus because of term limits), he had become ever more heavily involved as Providence was facing the challenges of the last half of 2014. With the departure of John and Justin, and Jack's assumption of interim oversight of the organization, Mark volunteered in January 2015 to spend a day a week to assist Jack and the staff of the transition period. During the many discussions that ensued in January, the notion arose that Mark would like to serve as a part-time Executive Director of Providence. He indicated that with the retirement of his father from their law firm the previous year, he had already begun the transition process of ultimately himself leaving the firm, and he looked upon the Providence opportunity as an exciting new phase in his career.

Following on the December Board meeting where John's departure and interim steps had been discussed, Jack presented the notion of Mark's involvement at the February 4, 2015 Board meeting. This possibility was vigorously discussed and Mark was asked to develop a written plan for the continuing work of Providence at a special Board meeting to be held on March 10, 2015. Thus the stage was set for the stabilization and revitalization of Providence.

The paper that Mark submitted for consideration at the March 10th meeting, "PHDC-The Way Forward" was accepted by the Board, who also appointed Mark as part-time Executive Director. It has since served as the blueprint for Providence activities. Major elements of the plan and discussion about it included:

- Providence would continue its outstanding property management work, and seek new management opportunities if financially helpful.
- Under the blueprint, the fundamental cost structure of Providence would change. The full-time positions (Executive Director and Development Director) would be replaced by a part-time Executive Director, substantially lowering administrative overhead.

- The line of credit would not be renewed, assuring fiscal accountability.
- Weekly cash flow summaries would be made available to the Executive Director and shared with the Board.
- Major project developments would be undertaken only in collaboration with a partner developer, reducing pre-development costs and expanding development capacity.
- More emphasis would be given to projects outside Monroe County.
- Providence would continue to assist the Diocese in finding uses for vacant and underutilized Diocesan properties.
- Further costs savings would come from hiring a Finance Director rather than a CFO.
- Lecesse Construction had formally agreed to shoulder pre-development costs for at least one, and possibly two, major projects over the ensuing two years.
- Providence would make an effort to aggressively pursue buy out of 15 year tax credit projects, with sole ownership enabling other options.
- Providence would seek other funding possibilities, including refinancing mortgages and seeking appropriate property tax relief.
- In addition to pursuing major development projects in concert with partners, Providence would also seek to develop smaller projects.
- More attention would be given to developing projects in collaboration with regional Catholic Charities agencies who would provide support services to project residents.

With the blueprint in place, Mark went about the business of developing a staff team to implement the action plans. Helen Bianchi continued to anchor property management activities in outstanding fashion. She had obtained a New York State brokers' license which put Providence in position to manage properties for third parties. In this work, she has been ably assisted by regional property managers: Renee Klatt (who had ten years of experience in Rochester and Troy), hired in 2011, and Sondra Young who replaced Christine Church in 2015. Providence's reputation continues to be enhanced by its outstanding property management services.

There was also a positive evolution of the Providence financial management team. In the wake of Cathy Vail's resignation (she did agree to help with completion of 2014 audits), financial management was provided by a part-time outside temporary worker, Tonya Ring, obtained through ProNexus, with day-to-day activities ably carried out by Kathy Guinip, who had been hired in 2010, and Jennifer Schuler who were both intimately familiar with all Providence financial activities. In April, Mark hired Tom Scanlon as Finance Director. Providence was most fortunate that when Tom left, Mark was able to hire Dan Sturgis as Finance Director in September, 2015. Dan's many years as a staff person with the Rochester Housing Authority (where he assisted in the creation or preservation of 2,000 units of affordable housing) and Board member of the Continuum of Care, enabled him not only to manage the finance function, but also to expand its activities serving the homeless through the grant activities described below.

Originally hired in 2014, Donna Granger became a very effective grants manager.

Throughout both the transition period, and in the time of exciting growth that followed, Executive Assistant Debbie Bilotta was the glue that has held the staff team together. Not only did she perform normal support functions, but she also took on numerous important program and administrative functions, including such activities as writing Federal Home Loan Bank applications. She was truly Mark's "right hand woman". It was this team that has made possible the accomplishments described in the next section.

4. Development, Management and Grant Activities

a. Development

As evidenced by the dearth of opportunities for major projects Providence was able to create in 2013 and 2014, generating such developments is a major challenge with many steps, any one of which could derail a project. The potential for project development, however, was significantly enhanced with the new availability of more than \$200 million annually for affordable housing from the Medicaid Redesign effort, and the five year major housing initiative enacted in the 2016-2017 State budget. Described here are development efforts undertaken in the last three years (Since Mark's appointment, always with a development partner).

As previously indicated, Holy Rosary and Son House were opened in fall 2013. In 2014, Providence secured ownership of Clark Park Apartments in Geneva, and received a grant from HHAC to provide all new windows for the properties. The project also involved commitment of project-based subsidies administered by the Rochester Housing Authority for eight units. The units were funded by NYS Office of Temporary and Disability Assistance/Homeless Housing and Assistance Corporation. Support services were provided by Catholic Charities of the Finger Lakes.

As indicated above, with the hiring of Mark Greisberger and the adoption of the blueprint for the future described above, beginning in March, 2015, Providence began aggressive outreach in partnership with others in the development arena. These efforts resulted in submission of one tax credit application in December, 2016, development of two strong major project possibilities for 2017, acquiring ownership of three projects, opening of one small project in fall 2015, pending acquisition of two rural development projects, and consideration of a variety of other development possibilities.

The tax credit application submitted in December, 2016, was for Durand Senior Apartments, previously known as St. Salome's II. Proposed were the creation of 70 units of mixed housing at two former church sites across Culver Road from one another, Durand United Church of Christ and St. Salome's Roman Catholic Church. As envisioned in the blueprint for moving forward, pre-development funding was provided by Lecesse Construction. St. Ann's Community agreed to become a partner in service provision. Development consulting assistance was provided by Janet

Meiselman with whom Providence had worked previously. A major grant was obtained from the HOME program through Monroe County.

During this time period, Providence acquired ownership of Union Meadows, Clemens Manor, Elizabeth Blackwell and West Town Village apartments through 15 year buy outs.

In fall, 2015, through the leadership of Providence, Catholic Charities Community Services opened a new three unit supportive apartment in Penn Yan for three individuals with developmental disabilities, which Providence manages.

Throughout 2016, Providence was in dialogue with entrepreneur Bob Quinn who had created several rural development affordable housing projects in western New York and was working to transition from business. Contracts were signed for the acquisition of projects in Mount Morris and Horseheads, thus further extending the reach of Providence beyond Monroe County as envisioned. At the end of 2016, closing of these transactions awaited governmental approval.

Working diligently through the spring and summer of 2016, Providence was able to purchase and lease to Catholic Charities of Wayne County a new main office facility at 180 East Union Street in Newark. Moving to a larger facility had become necessary when the agency received a major Federal grant that doubled the number of staff at the agency. This purchase would not have been possible without Providence and Mark's leadership.

In addition to these accomplishments, Mark and Providence staff also explored a variety of other project possibilities, some of which may still come to fruition. Among these explorations have been:

- Exploration of possible use of other Diocesan properties including St. Patrick's School in Seneca Falls and Holy Name of Jesus Campus in Monroe County.
- Acquisition and renovation of existing affordable housing on the site of the former St. Bernard's seminary.
- Acquisition and renovation of the existing affordable housing project in Port Byron.
- Developing a facility on vacant land across the street from McNiff Commons in Elmira.
- Developing a small project on land Providence controls adjacent to Clark Park in Geneva.
- In conjunction with Catholic Charities of Wayne County and Catholic Charities of the Finger Lakes developing a major initiative to increasing housing availability in a number of towns in the Finger Lakes area.
- In conjunction with Catholic Charities of Chemung/Schuyler and others developing a project in Montour Falls which could be the main Schuyler County office.

The future of Providence in the development area is certainly rife with exciting possibilities.

b. Management

As indicated previously, throughout this time period, Providence maintained its excellent reputation as a property management organization through the outstanding leadership of Helen Bianchi ably assisted by regional property managers Sondra Young and Renee Klatt.

A good overview of Providence management activity was provided in the 2014 Annual Report. As indicated in the report:

- Providence was managing 22 properties in the 12 County Rochester Diocese containing 752 apartments, providing homes for 1,500 persons.
- 70% of the properties were in rural areas.
- Residents were
 - * 60% female
 - * 48% under 25 years old
 - * 61% African Americans
 - * 16% over 65
 - * 14% disabled
- 93% of Providence residents were earning less than 50% of area median income.

Major highlights during this three year period were:

- In 2013 through a grant from Federal Home Loan Bank, necessary renovations were made to the Rivendell Court properties. Roofs were replaced on all three buildings, windows were replaced, kitchen and bath improvements were made and new furnaces and bath improvements were made.
- In late 2013, Providence was awarded a Federal Home Loan Bank grant for improvements at Son House.
- In the very cold winter of 2014-2015, Helen did an outstanding job in responding to a significant heating problem at Clemens Manor in Elmira. Long-standing weaknesses in the system were exacerbated by the extreme cold. Helen made several trips to Elmira to oversee measures to mitigate the problem and meet with community leaders to assure them that Providence was aware of the problem and responding promptly. Unfortunately, applications to the Federal Home Loan Bank for improvements to the heating system and other structural improvements in both 2015 and 2016 were not funded.
- In 2016, however, Providence was successful in winning a Federal Home Loan grant of \$266,467 for capital improvements to Elizabeth Blackwell Apartments in Geneva to address a number of structural issues which have arisen over the years, especially relating to the foundation and roof.

- In 2016, the management portfolio was expanded when Providence obtained a management contract for Rockwood Senior Apartments in Henrietta owned by Episcopal Senior Life Communities.

c. Grants Programs

As previously indicated, Dan Sturgis brought with him significant grants administration experience when he came to Providence in September, 2015. At Rochester Housing Authority, Dan had directed several projects that increased housing assistance in the community by \$20 million annually. This experience enabled Dan not only to maintain existing grant programs at Providence but also to gain more opportunities to reach out to high risk groups of homeless persons. As the grants described below were initiated, Donna Grainger, hired in 2014, has served ably as grants administrator.

Following is a summary of current grants:

- **Long Standing Grants**

- * **Shelter Plus Care, 50 Units:** This homeless supportive housing program provides tenant based rental assistance to homeless households. Support services are provided by East House. The 2016 renewal application scored 18th out of 51 applications for the 2016 local Continuum of Care review process. The total potential award for 2017 is \$442,444 which is \$35,509 less than the existing grant amount. The reduction is a result of the local process reallocating grant funds from programs that did not fully spend available grant funds over the previous 3 years. The program has corrected this issue in the 2015-2016 grant year and has utilized 97% of the funds available.
- * **Veterans Permanent Housing Program:** A 20 unit supportive housing program designed for homeless veterans. Support services are provided by East House. The 2016 renewal application scored 25th with a total potential award of \$173,730. This grant also had a reduction as a result of grant expenditures being lower than the grant award over the last 3 years. The program is now fully utilized and will be monitored monthly to ensure grants funds are fully utilized.
- * **NYS OASAS Support Services Grant** (for the Shelter Plus Care Program): This is a pass through grant to East House to partially fund their case management services to the Providence Shelter Plus Care program. The grant has been renewed annually and should continue to be renewed. Annual funding is \$74,232 and PHDC retains \$1,000 to cover administrative expenses.

- **Recently Acquired Grants**

- * **Suburban Supportive Housing Initiative:** In August 2016, PHDC took over an existing CoC grant from Temprow (supportive housing affiliate of Temple B'rith Kodesh). The program is designed to provide permanent supportive housing to 22 single parents in a suburban setting that will offer better

opportunities for children in school and a safer neighborhood for the family with the goal of decreasing the chances of recidivism to homelessness. While Providence will be the grant administrator, it will continue to partner with Tempro on determining the direction of the program. The grant is for \$267,823 annually and scored 10th on the local renewal process.

- * **NYS Supportive Housing Program/OTDA Support Services Grant** (for Son House): This is a pass through grant to Catholic Family Center to partially fund their case management services at Son House. The grant was awarded in 2016 for a 5-year term. The total grant amount is \$252,000. CFC will receive \$49,400 annually and Providence will retain \$1,000 for administrative expenses.
- * **City of Rochester Emergency Shelter Grant** – This is a one year grant to provide street outreach and engagement to homeless individuals and households with the goal of moving the household into permanent housing as quickly as possible and linking them with the necessary case management/support services to maintain stable housing. The program began operations in July, 2016; total funding is \$103,000 and will require annual renewal applications for funding.
- * **Monroe County Office of Mental Health** – This also is a one year grant to provide street outreach and engagement to homeless individuals and households with the goal of moving the household into permanent housing as quickly as possible and linking them with the necessary case management/support services to maintain stable housing. The program began operations in July, 2016; total funding is \$150,000 and renewals will be up to the discretion of MC OMH.
- * **Housing First Permanent Supportive Housing Program:** This is a housing first rental assistance program that seeks to house chronically homeless individuals and families in a permanent supportive housing program, the total annual grant amount requested is \$911,372. This new grant application was ranked 7th out of the 51 applications during the local Continuum of Care funding round. Providence will be responsible for administering the grant funds, rental assistance certifications and other housing related services.
- * **Rapid Rehousing Program:** Through this program up to 24 months of financial assistance and/or support services can be provided for homeless individuals and families to help them quickly return to permanent housing. Services can include up to 24 months of rental assistance, security and utility deposits, moving costs, and a wide array of support services including but not limited to: case management, housing search/counseling, landlord negotiations, legal services, employment assistance, transportation, etc. This assistance could be for clients that don't meet the chronic homeless

definition and clients that may not need long-term assistance to stabilize their housing. This new grant application was ranked 8th out of the 51 applications during the local Continuum of Care funding round. Providence will be responsible for administering the grant funds, rental assistance certifications and other housing related services. The potential grant award is for \$578,934.

- All 5 Continuum of Care grants are pending HUD award in spring 2017:
 - * Shelter Plus Care, 50 Units
 - * Veterans Permanent Housing Program
 - * Suburban Supportive Housing Initiative
 - * Housing First Permanent Supportive Housing Program
 - * Rapid Rehousing Program

d. Other Cost-Savings Measures

As promised in March 2015, over the last two years, Mark worked aggressively to improve the cash position of Providence (now over \$500,000) by taking steps to reduce costs and increase revenue. Examples of this activity have included:

- Refinancing one of the mortgages at Union Meadows at a considerably lower interest rate.
- Gaining tax exemption for Rivendell Court.
- Enacting measures to assure full and timely reimbursement to Providence of appropriate revenue from Providence properties.
- Securing a significant reduction in taxes for Union Meadows.
- Gaining property tax exemption for West Town Village.

All in all it has been a remarkable three years, with much progress in implanting the blueprint outlined in March 2015.

M. CONCLUSION

The previous volume in this series of histories “A Brand New World: The Evolution of Diocesan Catholic Charities Activities 2013-2016” detailed the many new challenges faced by the overall organization in this time period and the wonderful collaborative initiatives undertaken by the overall organization in response to these challenges.

This work has described the activities of the individual components of the organization (the “heart and soul of Catholic Charities”) from July 1, 2013 – December 31, 2016.

As written here, key to the success of the organization, as it continues to touch the lives of 250,000 annually, has been the outstanding leadership and continuity of the chief executives of each organization. (There was only one leadership transition – at Providence Housing – in this time period.)

Once again the activities undertaken by our strong Boards and leadership staff have proved that “change is in our DNA”, as the agencies have adroitly responded to changes in regulations, and new funding patterns, especially in Medicaid.

The individual agencies have remained faithful to our three-fold mission:

- Provision of quality direct service that empowers families and individuals
- Advocacy for public policies which enable families and individuals to work toward achieving their full potential
- Collaboration with Catholic parishes and faith communities of all denominations to address local issues and concerns

In this time period, particularly in Monroe County, but also more generally throughout New York State, there has been a new awareness of poverty and attention to addressing this significant societal problem. Catholic Charities in the Diocese has been serving poor and vulnerable persons for over 100 years and will continue to do so. This time period has seen a subtle shift in our focus with more emphasis on specific, targeted measures to help families move toward self-sufficiency. These efforts will continue as we move forward.