

PERFORMANCE AND QUALITY IMPROVEMENT PLAN ANNUAL REVIEW
2023-2024

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PQI ANNUAL REVIEW INTRO/OVERVIEW

Introduction

The leadership of CCI is committed to fostering a culture of excellence and continual improvement.

The PQI program is an agency wide effort and includes all personnel and stakeholders. PQI activities focus on all CCI programs and services. The goal of PQI is to advance effective services and to have a positive impact on persons served. PQI activities also help to advance effective management practices and support the agency's long-term strategic goals. Specifically, CCI looks to address organizational performance, quality of services, and client outcomes, using a change model approach commonly known as plan-do-study- act.

This report focuses on the PQI activities of CCI for the last year (2023 – 2024).

Overview:

During the year of 2023/2024 CCI maintained commitments of ensuring that the clients who are served by this agency annually receive the highest level of care possible. To provide a structure and format for this process, a PQI plan has been adopted and revised as needed each year employing a Plan/Do/Check/Act methodology. This plan is reviewed by CCI Service Line Directors, CCI Program Directors and the Agency Council PQI/Service Commission. The plan is then approved by the CCI Executive Director and CCI Agency Council. In addition to creating a road map for best practice standards, this plan also allows the agency to remain in compliance with standards set forth by the Council on Accreditation thus helping CCI to maintain full accreditation through each four-year cycle.

PQI STRUCTURE AND ACTIVITES FOR 2023-24

PQI STAKEHOLDERS:

CCI stakeholders are personnel, volunteers, interns, clients/participants, council members, funders, and community partners that have a vested interest in the services provided by CCI. Stakeholders are involved in the PQI process and are asked for their satisfaction/opinion through various types of surveys. These surveys are aggregated, and the results are reviewed by management to consider operational planning.

Personnel are involved in the development of outcomes and report on recommended improvements needed in their programs.

The CCI Agency Council provides consultation to the CCI Management Team on short- and long-term planning.

CCI receives evaluation and input from funders and community partners on an ongoing basis.

COUNCIL ON ACCREDITATION (COA)

The Council on Accreditation COA has approved the accreditation of CCI through **9/30/2025**. Catholic Charities Indianapolis is under a self-study evaluating period as part of a reaccreditation process. This process will culminate with a site visit by COA peer reviewers in August of 2025.

OPERATIONS AND MANAGEMENT MEASURMENT INDICATORS

Catholic Charities Indianapolis collects and maintains data on management and operational performance. The aim is to strengthen and build organizational capacity, measure progress toward achieving strategic goals and objectives, evaluate operational functions that influence the capacity to deliver services, and identify and mitigate risks. These measures include:

- Efficiency in the allocation and utilization of its human and financial resources to further the achievement of organizational objectives.
- Effectiveness of risk prevention measures
- Effectiveness at retaining a competent and qualified workforce through staff retention/turnover and satisfaction.
- Cost versus benefits of fundraising efforts.

- Contracting practices and compliance
- Achievement of budgetary objectives
- Effectiveness of community education and outreach
- Efforts to diversify the agency council, leadership, or workforce.

Catholic Charities Indianapolis reviews and addresses the findings and recommendations of external review processes, including as applicable:

- Licensing and other reviews related to federal, state, and local requirements.
- Government and other funder audits.
- Other review where appropriate.

PERFORMANCE AND OUTCOMES/OUTPUTS MEASURES

Catholic Charities Indianapolis will identify measures to build organizational capacity, improve services, and meet reporting requirements by evaluating:

- The impact of services on clients
- Quality of service delivery
- Management and operations performance

Personnel throughout the agency and stakeholders work together to identify key outputs and outcomes related to:

- Quantitative and qualitative indicators
- Data sources, including measurement tools used for identified measures.
- Performance targets

Each service line program will have an opportunity to conduct important individual output/outcome studies to determine the effectiveness of program services and the impact on individuals. Program Directors will select from focus areas: **EDUCATIONAL SUCCESS, WORKFORCE DEVELOPMENT & ECONOMIC ASSETS, SOCIAL CAPITAL, HEALTH AND WELL BEING, SYSTEMS LEVEL IMPROVEMENTS, PHYSICAL, MENTAL & BEHAVIORAL HEALTH SERVICES ACCESS, TRANSPORTATION ACCESS, SAFE AND AFFORDABLE HOUSING ACCESS & RETENTION, HEALTHY FOOD ACCESS, and STANDARD IMPACT (metrics related to the effectiveness of services and impact on individuals): change in clinical status, change in functional status, health welfare and safety, permanency of life situation, quality of life, and achievement of individual services goals.** Next, they will target all applicable outputs/outcomes to study. (i.e., **OUTPUTS** – what your program delivers. **FOR EXAMPLE:** Number of mental health or behavioral services provided, or number of meals served and/or **OUTCOMES** – observable and measurable effects your program’s activities have on clients. **FOR EXAMPLE:** struggling individuals progressing with treatment or therapy plan.)

The following is a sample of CCI outcomes/outputs desired vs. actual results for 2023/2024

Program	Metric	Focus Areas	Goal	Target	What are the Results?	Was the desired goal met? Yes or No	What actions should take place next?
Adult Day Services	Output	Healthy Food Access	Individuals receiving healthy food	12 Individuals	12 Individuals	Y	Develop solutions
Adult Day Services	Output	Healthy Food Access	Meals directly provided	800 Meals	866 meals	Y	Replicate good practice
Adult Day Services	Output	Physical, Mental, Behavioral Health	Participated in Physical Activity	15 Individuals	12 Individuals	N	Develop solutions
Adult Day Services	Output	Physical, Mental, Behavioral Health	Number of Physical Activity Sessions	500 Sessions	754 Sessions	Y	Replicate good practice
Adult Day Services	Output	Transportation	Received transportation Aid	10 Individuals	10 individuals	Y	Replicate good practice
Adult Day Services	Output	Transportation	Transportation Aid Services Provided	600 services	660 services	Y	Replicate good practice
SSW	Outcome	Achievement of individual service goals	Students will make progress towards service goals	85% will progress	89% progressed	Y	Replicate good practice
SSW	Output	Effectiveness of Services	Client charts will be error free	75%	65%	N	Develop solutions
Mental Health	Output	Physical, Mental, Behavioral Health	Struggling Individuals at or below poverty line to 185% receive mental health services	400 impacted	413 impacted	Y	Replicate good practice
Mental Health	Outcome	Physical, Mental, Behavioral Health	Individuals served will progress with treatment	75%	79%	Y	Replicate good practice

This is an aggregate report of metrics for individuals at 185% of the FPL or below served by Holy

Family Services, Adult Day Services, Refugee Resettlement, Crisis Office, and Individual and Couple Family Counseling. These results are 12 months of 18 month plan ending 12/31/2024.

Basic Needs Fund End of Year Report: Clients served 7/1/2023-6/30/2024 (Note: You must provide data only for clients served and services provided in UWCI's 7 Counties - Boone, Hamilton, Hancock, Hendricks, Marion, Morgan, and Putnam)	Goal metrics (as reported on contract)	Total Number (individuals, services, days, etc.)
Focus Area: SAFE AND AFFORDABLE HOUSING ACCESS & RETENTION		
Outcome: Individuals Access and Retain Safe and Affordable Housing		
TOTAL # OF UNDUPLICATED CLIENTS SERVED FOR THE FOCUS AREA: SAFE AND AFFORDABLE HOUSING ACCESS & RETENTION	1,400	829
Indicator: Reduction in the number of days a person spends homeless before being permanently housed.		
# of individuals who obtained permanent housing	775	572
# of days without permanent housing	1,250	17522
# of housing navigation services provided	20,000	1722
# of individuals provided safe, stable emergency housing while receiving supportive services.	850	570
# of nights of safe, stable emergency housing provided while receiving supportive services.	20,000	17522
# of days without permanent housing	20,000	17522
Indicator: Individuals receive support to obtain and/or retain permanent housing.		
# of individuals who received rental assistance.	600	115
# of rental assistance services provided.	860	121
# of individuals who received mortgage assistance.		
# of mortgage assistance services provided.		
# of individuals who received utility assistance.	750	53
# of utility assistance services provided.	750	53
# of individuals who received legal assistance to obtain and/or retain housing.		
# of legal assistance services provided.		
# of individuals who received supportive services to obtain and/or retain housing outside of the services currently being collected in this focus area.	250	474
# of supportive services provided to obtain and/or retain housing <u>outside</u> of the services currently being collected in this focus area.	250	1148
# of individuals referred to landlords accepting referrals	300	90
# of referrals accepted (by landlords).	150	90
# of landlords accepting referrals.		
Focus Area: HEALTHY FOOD ACCESS		

Outcome: Individuals Access Healthy Food and Nutrition Programs		
TOTAL # OF UNDUPLICATED CLIENTS SERVED FOR THE FOCUS AREA: HEALTHY FOOD ACCESS	4,000	4949
Indicator: Individuals provided access to healthy food (FOR FOOD PANTRIES ONLY)		
# of individuals who receive healthy food.	4,200	4588
# of pounds of food distributed to individuals.	108,000	70545
Indicator: Individuals provided healthy meals.		
# of individuals receiving meals.	950	405
# of meals served	46,175	53754
# Directly provided	42,575	53754
# Indirectly provided	1,800	0
# Distributed meals	1,800	0
Indicator: Individuals provided access to nutrition programs		
# of individuals participating in nutrition improvement programs	325	19
# of nutritional improvement sessions attended by individuals	750	23
Focus Area: PHYSICAL, MENTAL & BEHAVIORAL HEALTH SERVICES ACCESS		
Outcome: Individuals access physical, mental & behavioral health services		
TOTAL # OF UNDUPLICATED CLIENTS SERVED FOR THE FOCUS AREA: PHYSICAL, MENTAL & BEHAVIORAL HEALTH SERVICES ACCESS	1,360	456
Indicator: Individuals progressing with treatment or therapy plan.		
# of individuals receiving substance abuse treatment or counseling.	30	10
# of substance abuse treatment or counseling services provided.	30	17
# of individuals progressing with a substance abuse treatment or therapy plan.	18	5
# of individuals receiving mental or behavioral health services.	470	232
# of mental health or behavioral health services provided.	3,760	2034
# of individuals progressing with mental or behavioral health treatment or therapy plan.	376	157
# of individuals receiving care coordination for mental, behavioral, or substance abuse services	352	186
# of care coordination services received by individuals for mental, behavioral, or substance abuse services	700	1206
Indicator: Individuals accessing healthcare services and supports.		
# of individuals enrolled in healthcare benefits.	200	204
# of new health insurance enrollments facilitated.	565	263

# of individuals receiving health screenings and/or preventative health services.	210	180
# of health screenings and/or preventative health services provided.	350	341
# of individuals receiving care coordination for healthcare services and supports	215	35
# of care coordination services received by individuals for healthcare services or supports	260	35
Indicator: Individuals participating in physical activity.		
# of individuals participating in organized physical activity.	32	14
# of physical activity sessions attended by individuals	1,352	1305
Focus Area: TRANSPORTATION ACCESS		
Outcome: Individuals have transportation options		
TOTAL # OF UNDUPLICATED CLIENTS SERVED FOR THE FOCUS AREA: TRANSPORTATION ACCESS	700	160
Indicator: Individuals receiving transportation services or transportation aid.		
# of individuals receiving transportation aid.	700	160
# of transportation aid services provided to individuals	3,000	1555

See attachment A for the 2 generational study for Holy Family Services and Refugee Resettlement Programs.

CASE RECORD REVIEWS

These are conducted by program personnel who have the right to access private information. Reviews are completed to determine the presence or absence of key chart documents and the timeliness and clarity of each completed document. Case records are reviewed on a quarterly basis and will follow sampling guidelines consistent with COA performance and quality standards. Documents in the case records include intake, assessments, service plans, service delivery, appropriate consents, progress or case notes, and summaries, evidence of case supervision, relevant signatures, outcomes, and aftercare plans. In addition, this provides an opportunity to evaluate:

- Appropriateness of intakes.
- Service planning delivery .
- Need for continued service.
- Timeliness of services.
- Accessibility and availability of services.
- Efficiency of services.
- Continuity and length of service.
- Safety.
- Respectfulness of Services.
- Family involvement.
- Achievement of goals.
- Discharge decisions.

RISK PREVENTION MANAGEMENT ASSESSMENT

Review of Risk Management Data is conducted quarterly to assess a variety of risk management

monitoring activities. Risk Prevention and Management reports are completed by Program and/or Service Line Directors and submitted electronically. The PQI Coordinator, CCI management, and PQI Council review these findings to identify patterns/trends in need of attention to ensure the safety and quality of all services. An aggregated annual report is prepared by the PQI Coordinator which includes risk management monitoring results. These monitoring activities include:

- Critical Incidents
- Accidents
- Grievances
- Abuse and Neglect reports
- Medication Issues
- Serious Illness
- Auto Accidents
- Facility Safety
- Behavior Management Practices
- Privacy/Security

Area of Immediate Risk	Risk Identified Yes or No	Corrective Action Needed	Person or Group Responsible	Timeframe Needed
Compliance with legal requirements	NO	None recommended	Agency Council CCI Executive Director CCI Management Team	Ongoing
Technology and information management	NO	None recommended	Agency Council CCI Executive Director CCI Associate Director	Ongoing
Insurance and liability	NO	None recommended	Archdiocesan Risk Management Office	Ongoing
Health and Safety of administrative and service environments	NO	None recommended	Archdiocese Management Services CCI Executive Director CCI Management Team	Ongoing
Human Resources practices	NO	None recommended	Archdiocese Human Resources Department CCI Management Team	Ongoing
Contracting practices and compliance	NO	None recommended	Archdiocese Risk Management Office Legal Council Agency Council CCI Executive Director	Ongoing
Client Rights and confidentiality issues	No	None recommended	Privacy Officer PQI Team CCI Executive Director	Ongoing
Financial Risks	NO	None recommended	Agency Council CCI Executive Director CCI Management Team Archdiocese Senior Accountant	Ongoing
Area of Immediate Risk	Risk Identified Yes or No	Corrective Action Needed	Person or Group Responsible	Timeframe Needed

Public relations, branding, and reputation	NO	None recommended	CCI Agency Council marketing and Development Commission Offices of Stewardship and Development CCI Executive Director	Ongoing
Conflicts of Interests	NO	None recommended	Agency Council CCI Executive Director CCI Associate Director Archdiocese Accounting Office	Ongoing

CLIENT GRIEVANCES

CCI does not require the reporting of informal complaints as part of their grievance reporting process. These types of informal complaints are generally verbal in nature and usually responded to by a staff or supervisor within the program. Grievances of a formal nature are when clients are not satisfied with preliminary discussions. Clients are then requested to complete the CCI grievance form. This form is reviewed by the Executive Director who makes a final determination regarding the grievance. No formal grievances were submitted in 2023/24.

PROGRAM REVIEWS FROM OTHER EXTERNAL REVIEW PROCESSES

The following is a list of CCI programs reviewed by an outside organization during the fiscal year:

- Licensing and other reviews related to federal, state and local requirements.
- Government and other funder audits
- Accreditation reviews
- Other

Program	Organizations reviewing	Recommendation for Planned Improvement	Compliance Reached
Adult Day Services	Board of Health, Veterans Administration, Ind. Dept of Homeland Security, Medicaid, COA, United Way, CICOA Aging and In-Home Services, Optum	N	Y
Caregiver Program	COA, CICOA Aging and In-Home Services	N	Y
Crisis Office	Gleaners Food Bank, Ind. State Dept. of Health, United Way	N	Y
Holy Family Services	Marion Co. Health Dept., Marion Co. Fire Dept., HUD, IFHA, Dept. of Water Quality & Hazardous Materials, Dept. of Homeland Security (elevator, boiler, hot water heaters, backflow fire water system), COA, United Way	N	Y
ICFC	Ind. Professional Licensing Agency, COA, United Way, Kennrick Foundation, Franciscan Health, DMHA,	N	Y
Refugee Resettlement	USSCB, ORR/PRM, USCIS, COA, United Way	N	Y
RSVP	AmeriCorps, COA, United Way	N	Y
St. Elizabeth Coleman	Ind. State Dept. of Child Services, COA	N	Y
SCP	Corporation for National and Community Service (CNCS) COA	N	Y
School Social Work	Ind. Professional Licensing Agency, COA, United Way	N	Y

2023/24 CLIENT SATISFACTION SURVEY

CCI measures one area of stakeholder satisfaction through survey data. The survey was sent to all program directors and asked them to distribute to their clients. 56 clients responded to this anonymous survey.

Client Satisfaction Survey Question	1 (Strongly Disagree)	2	3	4	5 (Strongly Agree)	Comments
I felt program staff responded to my initial contact in a timely manner	0%	0%	3%	8%	89%	
I can easily access program services	10%	0%	3%	8%	79%	*Holy Family Services
I am treated respectfully by program staff.	0%	0%	0%	0%	100%	
I felt safe in Catholic Charities' program environments.	0%	0%	0%	0%	100%	
I received valuable services or information to support my needs.	3%	3%	0%	7%	87%	
I feel overall satisfied with services from Catholic Charities.	0%	0%	5%	8%	87%	
Satisfaction Survey Optional Question	Comments					
How do you think Catholic Charities can improve?	<ul style="list-style-type: none"> It is difficult to schedule appointments at a time that works for my daughter. She's a high school student, and her therapist is already booked for most of the after-school times. We really like her therapist, and it seems everyone else does, too. More therapists available after school hours I think they could open the other rooms up so other families can have a spot; we could eat in our rooms. Checking in digitally through app or online to make the transition faster to appointments 					
What do you think Catholic Charities did well?	<ul style="list-style-type: none"> We really like our therapist, Hailey. The office is easy to work with. By opening the door so me and my family can get on our feet. Friendly, respectful, and nonjudgmental Responsiveness and compassion while I navigate an interesting season of life. Helping with all the documents. 					

2023/2024 CCI PERSONNEL SATISFACTION SURVEY

CCI measures personnel satisfaction through survey data. A survey was sent to all program directors and asked them to distribute to all staff personnel. 32 personnel responded to this anonymous survey.

Personnel Satisfaction Survey Question	1	2	3	4	5	Other
My daily work is important to the success of the agency	(not important) 0	1	0	5	(Very important) 26	
My workload is reasonable	(unreasonable) 0	3	0	4	(very reasonable) 10	1
My work is supported by the necessary technology (i.e. software and hardware) required to complete tasks at a high level of performance quality.	(not supported) 1	1	4	8	(very supported) 18	
My work site promotes diversity, equity, and inclusion.	(never) 0	2	3	3	(always) 24	
Communication between management and personnel is good within my work area.	(no communication) 1	0	7	6	(very good communication) 18	
Management within my work area recognizes strong job performance.	(no recognition) 1	3	6	11	(strong recognition) 11	
I am satisfied with the opportunities I have to apply my talents and expertise.	(dissatisfied) 1	1	3	7	(satisfied) 20	
I am satisfied with the job-related trainings offered to me.	(dissatisfied) 2	1	9	4	(satisfied) 15	1
Catholic Charities offers adequate opportunities for career development.	(no opportunities) 2	2	8	8	(high level of opportunities) 9	3
I feel satisfied working for Catholic Charities	(very dissatisfied) 0	2	3	11	(very satisfied) 15	

2023/2024 EFFECTIVENESS OF CC TRAINING SURVEY

CCI measures the effectiveness of CC training through survey data. A survey was sent to all program directors and asked them to distribute to all staff personnel. 57 personnel responded to this anonymous survey but due to Survey Monkey pay wall, only 40 responses were analyzed.

Effectiveness of CC training survey questions	Yes	No
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Training I am offered within my program is responsive to the history, cultural backgrounds, and related needs of Catholic Charities personnel and clients.	85%	15%
Training I have received within my program outlines specific competency expectations for each job category.	82.5%	17.50%
Training within my program fulfills the continuing education requirements of my profession.	85%	15%
The training activities I receive within my program incorporate a variety of educational methods.	85%	15%
Training I receive within my program provides avenues for advancement within the organization.	67.50%	32.50%

PERSONNEL DEVELOPMENT AND TRAINING

CCI implements a training and development plan that promotes the enhancement of knowledge, skills, and abilities of personnel and prepares them to assume their responsibilities. This plan is reviewed annually and in accordance with CCI’s training needs. CCI tracks training received by all personnel to facilitate planning, scheduling, and monitoring fulfillment of training requirements.

2023/24 REVIEW OF PERFORMANCE DATA INVOLVING OPERATIONS & MANAGEMENT

AREAS OF POSITIVE PRACTICE IDENTIFIED 2023/2024

- Timely access of information about persons served through software systems in place.
- Full capturing, tracking, and reporting of financial, compliance and other business information exists.
- Longitudinal reporting and comparison of performance over time takes place.
- The use of clear and consistent formats and methods for reporting and disseminating data exists.
- Full compliance with legal requirements of agency.
- Insurance and liability, HR, service environment, and contracting practices all in compliance.

PERFORMANCE PLAN RESULT FINDINGS 2023/2024

PQI Annual Analysis made available from submitted reports lists the following as ACT plans:

1. Continue impact strategies to help clients achieve metrics related to the effectiveness of services and impact on individuals): change in clinical status, change in functional status, health welfare and safety, permanency of life situation, quality of life, and achievement of individual services goals in 2024/2025.

2. Operational performance findings:

- Efficient in the allocation and utilization of its human and financial resources to further the achievement of organizational objectives.
- Effective in risk prevention measures for critical incidents, accidents, grievances, abuse and neglect reports, medication issues, serious illness, auto accidents, facility safety, privacy and security, behavior management.
- Need for further analysis to determine strategies for retaining a competent and qualified workforce through staff retention/turnover and satisfaction.
- Need for updating SSW program client satisfaction survey to include feedback from host schools.
- Continue cost versus benefits of fundraising efforts.
- Contracting practices are compliant with Archdiocesan policies.
- Achievement of budgetary objectives in 2023/2024.
- Effective community education and outreach achieved.
- Continue efforts to diversify the agency council, leadership, or workforce.

Attachment A

[CSS FOF2023 October2024](#) – SharePoint