Jewish Family Service of Metrowest
2022-2027 Strategic Plan
Executive Summary:
2022-2027 Strategic Plan
Context

Populations JFS Serves

- Immigrants
- Older Adults
- Jewish Families

Opportunities for Strategic Plan

- Clarify Brand Identity
- Connect Internal Programs
- Strive for Financial Sustainability

Populations JFS Serves

- Older Adults
- Jewish Families
- Immigrants
Assumptions for Strategic Plan

**Additive Piloting:** Anything new is initially *additive* to the status quo, and will be tested over time to determine whether it will be implemented agency-wide.

**Involves Community:** Any path forward will emphasize community engagement and community building, including volunteerism.

**Prioritizes Adaptability:** Paths offer opportunities to go deeper, expand programming, and/or innovate to allow JFS to continue to be nimble as they work to better serve the community.
Strategy Overview: Whole Client/Whole Family Approach

Through Immigrant Services programming, JFS has taken a **whole family approach** to support clients

| JFS case workers help individuals and their families get connected to the various services they need and refer them to outside partners. |

The development of formal processes within Immigrant Services has led to more holistic support for families

| This process has been narrowly applied within Immigrant Services, but is not systemically applied across the agency. JFS rarely connects clients across program Service Lines. |

By extending the whole family approach to other program areas and improving organizational structures to support it, JFS will better support clients and families

| Increasing collaboration among JFS programs staff | Developing formal partnership processes and expectations | Outlining and following set internal processes and procedures |
Strategy Components: Whole Client/Whole Family Approach

<table>
<thead>
<tr>
<th>Starting Point</th>
<th>Ending Point</th>
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<tbody>
<tr>
<td>• Formalize whole family approach process in Immigrant Services (IS)</td>
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<td>• Assess capacity and infrastructure needs, including those required to adapt across Service Lines</td>
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<td>• More closely align compatible JFS service lines under whole family approach</td>
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<td>• Invest in developing agency-wide systems (partnerships, collaboration, and processes)</td>
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<td>• Leverage all JFS services and capabilities to holistically support clients/families in a coordinated effort, while maintaining standalone offerings</td>
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Connect Internal Program Silos

• Explicitly outlines Immigrant Services (IS) process as is
• Adapts and tests IS among service lines involved in testing
• Proactively identifies and addresses structural challenges and opportunities across departments and within greater organization
• Maintains balance across organization with respect to pace of innovation & progress

Clarify Brand Identity

• Emphasizes the “F” (Family) in JFS
• Whole family approach – and programs under this umbrella – become central to JFS’ identity
• JFS deepens credibility as adaptable to individual’s needs regardless of entry point and in specific issue areas
• Improves external partnerships and community engagement/volunteerism structures at the front of the process

Strive for Financial Sustainability

• Initial capacity/financial burden is spread across multiple service lines, not within a single service line
• Eventual capacity/financial burden is spread across organization
• Ability to seek funding across issue areas and based on widespread application of whole family approach, with initial focus on one or more issue area
• Allows JFS to streamline programs while maintaining standalone offerings
• More clearly able to relate program structure of JFS to donors
Current Immigrant Services (IS) process is brought into the Elder Care and/or JFAN service lines, and guardrails defined for standalone programs.

Service Lines test process in a pilot program and amend approach to fit each vertical’s needs.

Service Lines develop structures needed for improved collaboration within and across Service Lines, with external partners, and for community engagement/volunteerism.

Additional capacity brought in to develop and implement these structures and supports across JFS broadly.
# Implementation Planning
Among JFS Staff

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Activity</th>
<th>Outcome Indicator</th>
<th>Staff Lead</th>
<th>Supporting Staff</th>
<th>Board Role</th>
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<td>Refine the WFM within Immigrant &amp; Refugee Services</td>
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<td>Extend the WFM to another program vertical</td>
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<td>Develop criteria for standalone programs</td>
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<td>Develop external branding and development campaign</td>
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JFS Strategic Plan Implementation - 2021/2022

Focus: Develop the Whole Family Model (WFM) across JFS

### 2021
- Sept
- Oct
- Nov
- Dec

### 2022
- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec
Guardrails for JFS to Consider

*To be determined during Implementation Planning*

**Innovation & Adaptability**
- When JFS is presented with new community needs, how will it decide whether to address the need directly, through partners, or neither?

**Client Criteria**
- To what extent will JFS focus on serving people in crisis, working toward stability, or sustainability?

**Geography**
- Will whole family programs serve family members in Framingham, Greater Framingham, or Metrowest as a whole?

**Network**
- What criteria are used to select partners?
- What mutual obligations will be involved?

**Investment**
- To what extent will JFS need to focus on raising funds for staff, infrastructure, and other capacity?
Resource Opportunities & Requirements

To be determined during Implementation Planning

Resources Required

- Upfront resources
- Long-term/variable resources

Sources of Funding

- Internal redistribution
- External new or recurring sources
New Budget Priorities: to support Year 1 phase of Strategic Plan ($430K Investment)

**Connect Internal Programs**
- New Budget has $50k to address Salesforce upgrades to integrate programs across JFS
- Staff time to review program model and integrate in WF
- $80K to Fund GCM Expansion (Elder Services)

**Clarify Brand Identity**
- $70K Fund Full time MARCOM position and activities. Additional to what is already in place

**Strive for Financial Sustainability**
- $90K to fund expansion of Development Department – Major Gifts Officer
- Increased MARCOMM efforts and Community engagement events
- $80k for new financial tracking and planning software
- $60K for pay equity adjustments - personnel retention and stay competitive for talent