

*Inspired by Jewish values, we protect the vulnerable and help*

# **GULF COAST JFCS**

## **STRATEGIC PLAN & GOALS**

*people achieve fulfilling*

**2020-2023**

*lives by empowering*

*individuals and*

*strengthening families.*



**gulf coast**

# **JFCS**

Gulf Coast Jewish Family & Community Services

# Goal 1

Ensure the values of the agency's Jewish roots are understood and systemically embedded in its governance and operational functions.

## Strategy

## Initiative

Increase Staff and Board Knowledge and Understanding of Agency's Stated Values

1. Incorporate Instruction on Agency's Stated Values Into New Board Member Orientation
2. Highlight Values on the Agency's Website and Link Values to Programs
3. Implement a Values Training Series for Agency Employees and Track Participation
4. Incorporate Values Education Throughout Everyday Communication Processes

Ensure Board Diversity and Develop its Leaders

1. Develop a Transparent Process for Identifying Future Board Leaders
2. Establish a Board Leadership Training Course for Future Board Leaders
3. Utilize Board Attributes and Demographics to Identify Board Strengths and Gaps

Broaden the Agency's Brand to Remove Perceived Barriers to Accessing Services

1. Shorten the Agency's Name
2. Brand and Promote an Agency "Tag Line" to Encapsulate its Broad Range of Services
3. Shorten Agency's Mission Statement and Disseminate
4. Recruit Non-Board Members with Experience For Board Committees and to Serve as a Pipeline for Future Board Members

Strengthen Overall Agency Awareness of and Engagement with the Federation of Florida's Gulf Coast

1. Host an annual leadership retreat around the Federation, its mission and work, including a tour of Federation offices
2. Invite Federation executive(s) to present annually to agency managers' L.E.A.D. meeting
3. Promote Federation e-news to GCJFCS workforce and incorporate select articles and events via employee newsletter.
4. Executive Team Members engage in Federation leadership programs where appropriate, to strengthen relationship and identify partner opportunities
5. Partner with Federation to sponsor attendance in and presentations for the Hope Cohen Barnett Leadership Institute
6. Host annual session of the Hope Cohen Barnett Leadership Institute
7. Target and Promote Opportunities to Engage Emerging Jewish Leaders Through Volunteer Services

## Goal 2

Build a Fund Development Plan with Strategies and Initiatives that Increase Contributions and Support the Future Continuity of Programs and Operations

Strategy	Initiative
Focus and Elevate the Agency's Development Efforts	<ol style="list-style-type: none"><li>1. Reestablish the GCJFCS Development Function via direct reporting to the President and CEO</li><li>2. Hire and Onboard a New VP of Development</li><li>3. Focus Volunteerism Under a Single Full-Time Employee</li></ol>
Strengthen Board's Role in Identifying, Cultivating and Soliciting New and Existing Donors	<ol style="list-style-type: none"><li>1. Identify Board Focused Development Training Opportunities and Support Board Members' Annual Attendance</li><li>2. Establish Annual Stewardship Goals for Board Members and Monitor Performance</li></ol>
Ensure Strong Leadership of Board Development Committee	<ol style="list-style-type: none"><li>1. Recruit Non-Board Members with Fundraising expertise to Committee to Serve as a Pipeline for Future Board Members</li><li>2. Utilize the Tree of Life Guild as a Recruitment Source</li></ol>
Create a Culture of Stewardship	<ol style="list-style-type: none"><li>1. Strengthen and Elevate the Responsibility of Donor Information Management</li><li>2. Conduct Board and Staff Training Focused on Stewardship</li><li>3. Create Annual Output Goals with Progress Measures</li><li>4. Establish and Invest in Donor Recognition Program(s)</li><li>5. Release 2nd Edition of "Faces of Gulf Coast JFCS" Book</li></ol>
Aggressively Promote the Work of Gulf Coast	<ol style="list-style-type: none"><li>1. Update Annual Marketing and Social Media Plan</li><li>2. Produce Agency Promotional Video</li><li>3. Develop Virtual Tour of Agency Programs</li></ol>
Increase Legacy Giving	<ol style="list-style-type: none"><li>1. Develop "Case Statement" for Support</li><li>2. Develop Legacy Giving Plan with Related Goals</li><li>3. Formalize "Legacy Gifts Society"</li><li>4. Link to Agency's 50th Anniversary Celebration</li></ol>
Obtain Grants to Support Agency Programmatic and Operational/ Infrastructure Needs	<ol style="list-style-type: none"><li>1. Purchase Annual Access to Comprehensive Grants Database</li><li>2. Develop Annual Plan to Aggressively Apply for Grants and Establish an Annual Goal</li><li>3. Engage Additional Grant-Writing Support</li></ol>
Increase Awareness of Agency Programs among Gulf Coast Cares (GCC) Trustees	<ol style="list-style-type: none"><li>1. Incorporate Agency Program Updates into GCC Quarterly Meetings</li><li>2. Develop a Mission-Focused Orientation Program for GCC Leaders</li><li>3. Increase Outreach to GCC Trustees Beyond Quarterly Meetings</li></ol>
Plan for Transition Among Gulf Coast Cares Trustee Leadership	<ol style="list-style-type: none"><li>1. Review, Clarify and Amend GCC Bylaws for Election/Appointment of Officers</li><li>2. Review Trustee Terms and Establish Recruitment Plan to Ensure a Pipeline of Experienced, Future Trustees</li></ol>

## Goal 3

### Systemic Review of New and Existing Programs to Support Smart Growth<sup>1</sup> Strategy and Sunset Unsustainable Programs

Strategy	Initiative
Ongoing Review of Existing Programs	<ol style="list-style-type: none"><li>1. Utilize Matrix Map to Highlight Areas of Focus for Investment or Downsize</li><li>2. Utilize Annual Budgeting Process to Identify Areas of Concern and Ensure a Plan to Address them</li></ol>
Acquire Smaller Non- Profits Whose Missions and Work Align to Gulf Coast JFCS's Smart Growth Strategy	<ol style="list-style-type: none"><li>1. Establish Protocol for Review and Assessment of Opportunities</li><li>2. Annually Identify, Select and Review A Non-Profit for Possible Acquisition</li><li>3. With Board Approval, Carry Out the Protocol for Acquisition</li></ol>
Develop New Programs to Address New and Emerging Needs in the Tampa Bay Region.	<ol style="list-style-type: none"><li>1. Utilize Grants Software and Review RFPs to Identify Mission-Aligned Opportunities that Support Smart Growth</li><li>2. Review, Strengthen and Utilize "Board Program Review" Tool as Needed to Present New Programs for Approval</li><li>3. Continuing Education via Engagement in Non-Profit Circles &amp; Convening Programs</li></ol>
Secure CARF Reaccreditation	<ol style="list-style-type: none"><li>1. Assemble CARF Review Committee</li><li>2. Conduct CARF Self-Assessment</li><li>3. Host CARF Reviewers for Formal Assessment Visit</li></ol>

<sup>1</sup>At. Gulf Coast JFCS, Smart Growth means the addition of new programs which, in addition to aligning with the agency's mission, have been: 1) recommended by the Board's Strategic Planning Committee (for initiatives budgeted at \$250K or above); or 2) successfully vetted through the Agency's Board approved non-profit acquisition process; 3) Fits one of the Agency's key areas of service; 4) Is ideally located for oversight and collegial connection; and 5) is deemed to have at least a break-even budget.

## Goal 4

Elevate the Gulf Coast JFCS Brand Throughout Tampa Bay, Increase Collaboration, and Build Alliances Within the Region's Corporate Sector

### Strategy

### Initiative

Increase Agency's Visibility Among Tampa Bay's Corporate Leaders

1. CEO Engagement Through Membership in One of the Regional Councils or Programs that Convenes and Develops CEOs
2. Facilitate Focused One-One Meetings of CEO with Targeted Regional Corporate Executives

Establish a Presence Among Tampa Bay's Regional Chambers' Professional Leadership Programs

1. Support Agency's Emerging Leaders in Leadership St. Pete, Leadership Tampa Bay
2. Host Leadership Sessions as Strategy for Increasing Awareness Among Emerging Leaders
3. Actively Apply for Opportunities to Engage Chamber and Other Leadership Graduates in GCJFCS Service Projects

Prepare to Celebrate the Agency's 50th Anniversary of Incorporation (July 2, 1975 – 2024)

1. Establish 50th Anniversary Committee
2. Develop and Implement the Gulf Coast JFCS 50th Anniversary Celebration Plan
3. Design and Produce Collateral Materials

Engage Tampa Bay Corporate Teams in Volunteer Opportunities Across the Agency

1. Annually Submit Proposed Projects for Corporate Sector in Partnership With the United Way and/or Other Entities that Sponsor Large-Scale Volunteer Days and Efforts
2. Annually Identify Appropriate Projects Ready for Volunteers
3. Align GCJFCS Service Projects to Corporate Interests and Target Opportunities

## Goal 5

Ensure the Agency's Infrastructure and Risk Management Portfolio Will Support Its Future Needs.

### Strategy

### Initiative

Strengthen IT Operations

1. Review IT Assessment and Implement Recommended Projects
2. Review, Revise and Present IT Policies for Board Approval
3. Establish IT Policies to Address Changing Needs
4. Determine the Division's Leadership and Staffing Plan Needed to Ensure Success in Serving the Agency's Evolving Needs

Strengthen Capacity to Recruit, Hire, Train, Retain, and Compensate the Agency's Workforce.

1. Review Human Resources Assessment and Implement Recommended Strategies
2. Update Workforce Compensation Study
3. Utilize NJHSA and Regional HR Studies to Assess the Agency's Benefits Plan and Contributions Relative to Comparable Agencies
4. Revise Agency Benefits Plan

Ensure the Agency's Software Programs are Sufficient to Meet Future Operational Needs and Remote Working

1. Conduct a Review of the Agency's Client Database and Update/Upgrade as Needed to Comply with State Reporting Requirements
2. Implement New Employee Onboarding, and Time and Attendance Product
3. Develop Plan and Strategies/Costs to Convert to Electronic Health Records (EHR)
4. Convert to Full Utilization of EHR Agency Wide
5. Purchase Product to Support E-signatures for Contracts
6. Research and Implement HIPAA Compliant Virtual Work Platform for Agency Wide Use

Identify Agency Risks and Mitigate Them

1. Conduct a Comprehensive Risk Assessment
2. Establish Practices, Policies and Related Procedures to Mitigate Identified Risks

Comprehensive Review of Agency's Insurance Needs and Related Expenditures

1. Review of 5-year Performance History Including Annual Costs and Claims Trends
2. Conduct Formal Bid for Broker Services

Comprehensive Review of Agency's Employee Benefits and Related Plans

1. Review 5-year Use Trend and Related Expenditures
2. Review and Present Current Trends in HR Benefits
3. Present Full Employee Benefits Plan to Board Committee for Approval
4. Conduct Formal Bid for Benefits Broker/Services

Address Agency's Facilities and Deferred Maintenance Needs

1. Review Facilities Assessment, Prioritize Projects and Determine Costs to Address Them
2. Develop Capital Funding Plan and Timeline for Agency Projects



Gulf Coast Jewish Family & Community Services