BLUEPRINT FOR IMPACT

Strategic Plan 2020

Jewish Family Service
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**Implementation Action Plan** ......................................................... *(internal document under separate cover)*
Dear JFS Family,

We first embarked on this Strategic Planning effort in January 2020, and never could have imagined what the future held for our world, country, community, and agency. When the COVID-19 global pandemic began to upend the world we knew, JFS—as it has done time and time again in its 102-year history—ran toward the crisis to offer critical services and vital support.

Initially, we debated whether we should postpone the Strategic Planning process. JFS was moving 200+ staff to working remotely and transforming services to meet unprecedented community need. As JFS showed that it was equipped to help meet this need, we knew this was exactly the time to dive deep into the core of JFS and provide a blueprint to strongly position the agency in an uncertain future.

Early on, the pandemic highlighted racial disparities with the coronavirus disproportionately affecting lower-income people of color. Then, midway through our process, the crisis of COVID-19 was compounded by widespread social unrest. The deaths of George Floyd, Breonna Taylor, and other Black Americans heightened our awareness to injustice and inequity. It became imperative for the new plan to recognize that our past actions as an agency in addressing equity, diversity, and inclusion were not enough. We must be committed and determined through demonstrable actions that put equity at the center of our work.

JFS was fortunate to have an already strong assembly of guiding principles and values from its prior strategic plan in 2014. The new plan is both reflective of this foundation and modernized to chart JFS’s course in a much different world.

These efforts spanned more than six months and engaged JFS staff, Board members, community members, and partner organizations. Participants contemplated fundamental questions about JFS’s strengths, values, and aspirations for itself and the communities it serves. The result is a clear picture of an agency that JFS will strive to become in the very near future, and a series of goals, objectives, and actions for getting there.

Specifically, the Blueprint For Impact calls for an agency that lifts up people of all backgrounds, and also acts on its unique position to help ensure that the Jewish community receives the social services it needs; an agency that is steady in its day-to-day service for the community and nimble enough to react quickly to community or world events; an agency that prioritizes innovation and equity.

JFS is already this agency in many ways, but there is without a doubt room to stretch JFS’s capabilities and evolve. JFS staff and the JFS Board of Directors are committed to using this Blueprint to guide that evolution and make JFS’s impact even more profound. We look forward to partnering with you all along the way to create a stronger and healthier community where everyone can thrive.

Moving Forward Together,

Adam Welland
Chair, Board of Directors

Michael Hopkins, MSW
Chief Executive Officer
Introduction

Blueprint Purpose and Overview
We are living in a unique moment in time with complex challenges and unique opportunities. The Blueprint For Impact refines and identifies our purpose, commitments, and Jewish values and boldly sets out the goals for the agency to thrive in the delivering of its mission. This strategic plan places an emphasis on operationalizing efforts to achieve measurable results, and it infuses innovation, learning, and equity at all levels of the organization. With the Blueprint For Impact charting our course, we will maximize our impact as we take meaningful action to meet the evolving needs of the community we serve.

Planning Process Overview
Over an eight-month period between January and August 2020, we engaged the Board of Directors, staff, volunteers, and community stakeholders through a variety of meetings, workgroups, and surveys to create the Blueprint For Impact. The planning process occurred in three phases with the guidance of MIG, Inc. as our strategic planning consultants.

- **Phase I: Assessment** – generate input and ideas about current status and potential for the future through a range of engagement activities
- **Phase II: Strategy Development** – develop the goals, strategies, objectives, performance measures and actions
- **Phase III: Strategic Plan** – complete the draft and final plan

Similar to the preceding strategic plan, the Blueprint For Impact is organized around the “why, what, where, and how” of JFS — what we stand for, why we are compelled to do our work, what we are uniquely positioned to do in the community, and how we will maintain and increase our impact. Where we do our work is an important and new consideration in this plan.

The why of JFS is answered in our statement of Purpose, our Commitments, and our Values. To address the other dimensions, the following key questions, developed by the Board of Directors, served as the basis for gathering information and engaging participants during the Assessment Phase.
Key Questions

1. What can we do to best serve specific communities in need? (WHAT)
2. How do we put equity at the center of our work? (HOW)
3. What is JFS’s role in meeting the specific needs of the Jewish community? (WHAT)
4. How does JFS want to be (or is JFS) known by the community? (WHAT/HOW)
5. How should we balance advancing strategic initiatives, responding to emerging/urgent needs, and maintaining our core services? (HOW)
6. What does exceptional Board governance look like for JFS? (HOW)
7. How do we promote and explore innovation throughout the organization? (HOW)
8. How do we attract and retain staff and volunteers (the People of JFS)? (HOW)
9. How do we ensure that our work continues to be adequately resourced? (HOW)
10. What should be the balance between our local and regional efforts? (WHERE)

The assessment included a range of engagement activities with internal and external stakeholders, which allowed us to gather feedback and ideas that shaped the Blueprint. For more details on the planning process, please refer to the Appendix.
Our Framework

The *Blueprint For Impact* framework outlines our purpose, commitments, and Jewish values that serve as the foundation for the goals, strategies, and performance measures. The components of our framework are interrelated and complement one another. Together, they form the basis and the directive that will guide us through evolving challenges and opportunities in a changing environment.

**Who We Are: Our Purpose and Commitments**

Since 1918, we have been an integral part of the human services system in San Diego adapting to address the ever-changing needs of those we serve. Early on, our efforts were dedicated to meeting the needs of the Jewish community and welcoming new immigrants. Since then, our work has been shaped by the global crises that defined the last century – the Great Depression, World War II, the Holocaust, Recession, and currently, the COVID-19 pandemic and the gathering movement to end racial injustice.

We have a broad network of staff, volunteers, supporters, and community partners who are committed to the pursuit of one shared goal: helping individuals and families in San Diego *move forward*. We serve regardless of religion, race, color, ethnicity, national origin, ability, gender identity/expression, or sexual orientation. We welcome everyone with dignity, compassion, and respect. We put people and their wellbeing at the center of everything we do. By working together to improve the lives of individuals and families, we strengthen the whole community.
Purpose Statement
Jewish Family Service partners with people of all backgrounds to build stable and dignified lives. Together, we create a stronger and healthier community where everyone can thrive.

Our Commitments
Team JFS can only succeed when we succeed together. We hold ourselves and each other accountable to:

- **Put people first.**
  We meet people where they are and respond to individual needs.

- **Use data to inform our results.**
  We rely on data to guide decisions and build solutions.

- **Learn and grow.**
  We learn about issues that impact those we serve and grow our skills so that we can better serve them.

- **Build strong relationships.**
  We are inclusive, collaborative, and transparent.

- **Work curiously and creatively.**
  We ask questions, listen to diverse voices, and challenge old ways of thinking.

- **Respond nimbly.**
  We pivot to react to the needs of the community and each other quickly and thoughtfully.
Why We Serve: Our Values
Through our work, we live our foundational Jewish values. They are the driving force behind our actions and influence everything we do. More profoundly than who we serve, our identity as a Jewish agency speaks to why we serve.

Rabbi Akiva said that “You shall love your neighbor as yourself” (Leviticus 19:18) is the great principle of the Torah.

Justice (Tzedek)
We believe in the inherent dignity of the individual.

Repair the World (Tikkun Olam)
We believe that social action and the pursuit of social justice creates a more equitable world.

Acts of Loving Kindness (Gemilut Hasadim)
We believe our actions will lead to protecting and defending the most vulnerable.

Healing (R’fuah)
We believe that in a fractured world we can provide healing.

Community (Kehillah)
We believe in our shared responsibility to lift-up the community.

Hope (Tikvah)
We believe that for a better tomorrow, we invest in today.

Where We Serve: Our Reach
JFS provides services primarily to San Diego County communities. We also contribute to programs in Riverside County and other communities through partnerships where we add unique value and support.
What We Will Achieve: Our Goals

Our Purpose Statement, Commitments, and Values serve as the basis for the Blueprint Goals, Objectives, and Strategies. The Goals provide achievable and action-oriented targets for the development and implementation of all initiatives moving forward. Working to achieving these goals will engage us deeply in innovation, equity, and learning.

**Goal 1 Caring for Our Community**
Use our strengths to be both an early responder and dependable provider to communities and individuals with human service needs.
We can be an early responder and at the same time operate our core services year over year.

**Goal 2 Living Our Jewish Values**
In serving the greater community, remain focused on our responsibility to the Jewish community.
We are recognized as a leader and advocate for the health and well-being of the Jewish community.

**Goal 3 Driving Innovation**
Embrace innovation to further operational excellence and advance the human services sector.
We will infuse innovative thinking and practices at virtually all levels of the organization: culture, operations, program design, and service delivery.

**Goal 4 Committing to Equity**
Proactively counteract inequities inside and outside of the organization by putting equity at the center of our work.
We are moved to address the inequities in our society, and to ensure our organization is a model of equity, diversity, and inclusion.
Goal 5  Valuing Our People
Attract, develop, and retain a mission-driven, diverse workforce and volunteer corps.
Our workforce and volunteers are at the center of why we are successful, and we will strengthen the way we attract and retain staff and volunteers. JFS is the place to do good – the place to deliver on our shared values.

Goal 6  Securing Today, Planning for Tomorrow
Develop significant, sustainable, and flexible sources of funding and resources.
Maintaining adequate resources is as important and challenging as ever.

Goal 7  Enhancing Governance
Maintain strong Board leadership and governance.
Board culture, diversity, and operational enhancements are near-term priorities. We will also leverage talents and expertise, commit to equity, and strengthen Board functioning.

Our Goals are measured by a set of Objectives and Indicators to enable us to track our progress, learn and adjust as needed to better realize the impact we seek. (See Impact Section)
How We Will Serve: Our Strategies

Each Goal is followed by concrete Strategies which are in turn achieved by implementing specific actions to make the Blueprint operational and measurable. The Strategies are intended to be impactful, implementable, and focused on the results we seek within JFS and for the community we serve. Action planning will be conducted every year to reflect the current environment.

**Goal 1**
**Caring for Our Community**
Use our strengths to be both an early responder and dependable provider to communities and individuals with human service needs.

**Strategies**

a) Create and use tools and processes to assess our ability to respond to urgent and non-urgent community needs, including new geographic and programmatic areas that are mission aligned, as they arise.

b) Expand collaborations with external partners to augment the continuum of services for community members.

c) Informed by our policy, program, and funding objectives strengthen our ties to local, State, and federal government leaders.

d) Increase awareness of our services and impact.

**Goal 2**
**Living Our Jewish Values**
In serving the greater community, remain focused on our responsibility to the Jewish community.

**Strategies**

a) Identify aspects or gaps of current services that could be enhanced by our expertise in the Jewish community, particularly those relating to poverty.

b) Strengthen engagement with the full range of stakeholders in the Jewish community.

c) Increase the Jewish community’s awareness of the full array of our programs and services.

d) Provide additional volunteer opportunities, particularly for Jewish youth, teens and young adults.

e) Via a Jewish lens, foster community dialogue on current issues.
Goal 3  
**Driving Innovation**  
Embrace innovation to further operational excellence and advance the human services sector.

**Strategies**

a) Conduct regular visioning and ideation sessions to advance our impact.

b) Increase use of cross-functional and project-based teams to foster effective communication and collaboration.

c) Be rigorous and pioneering in the use of data to improve all programs and operations.

d) Expand use of technology to strengthen organizational operations and program delivery.

Goal 4  
**Committing to Equity**  
Proactively counteract inequities inside and outside of the organization by putting equity at the center of our work.

**Strategies**

a) Create an Equity, Diversity, and Inclusion (EDI) plan that outlines programs, practices, and processes that will result in actionable change.

b) Establish a shared language and learning framework to achieve an equity culture.

c) Engage and communicate with external stakeholders (funders, partners, community) to elevate JFS’s ability to center equity in our work.

Goal 5  
**Valuing Our People**  
Attract, develop, and retain a mission-driven, diverse workforce and volunteer corps.

**Strategies**

a) Develop, implement, and maintain a philosophy to guide compensation decisions at all levels of the organization.

b) Maintain JFS as a safe place to work and volunteer.

c) Update our talent management strategies to ensure our team has access to world class learning, tools, and opportunities.

d) Explore and implement options for cutting-edge workplace practices, such as flexible workplaces and schedules.

e) Enhance current volunteer structure and operations to be a leading venue for individuals, families, and groups to engage in meaningful projects and opportunities.
Goal 6
Securing Today, Planning for Tomorrow
Develop significant, sustainable, and flexible sources of funding and resources.

Strategies
a) Expand base of contracts and grants in alignment with organizational and community priorities with a focus on public sector and large foundations.
b) Maximize the full potential of the Centennial Countdown Campaign
c) Implement plans for increasing individual giving with a focus on unrestricted funding.
d) Creatively respond to the new fundraising environment to meet current needs for services in our COVID-19 new normal.
e) Enhance our partnership with the CARS program and explore additional social enterprise opportunities.

Goal 7
Enhancing Governance
Maintain strong Board leadership and governance.

Strategies
a) Diversify the composition of the Board.
b) Continue to evaluate and adopt best practices of high-performing boards.
c) Engage Board members as champions of specific goals and strategies in the Blueprint For Impact.
Measuring Our Impact

Performance Measurement: Objectives
The Blueprint For Impact provides accountability for performance using a set of performance measures that attempt to answer two sets of linked questions – “how much did we do and how well did we do it?” and “how hard did we try and what did we produce?” Using this Results-Based Accountability framework, JFS leadership will further quantify these objectives and identify data development needs within Year 1.

Goal 1
Caring for Our Community
Use our strengths to be both an early responder and dependable provider to communities and individuals with human service needs.

Objectives
• Evidence/data that our programs and services are meeting current and emerging needs.
• Increased percentage of clients who report that they are better off than before and have more hope for the future.

Goal 2
Living Our Jewish Values
In serving the greater community, remain focused on our responsibility to the Jewish community.

Objectives
• Evidence/data that our programs and services are meeting current and emerging needs of Jewish clients.
• Increased percentage of Jewish clients who report that they are better off than before and have more hope for the future.
• Increased participation by Jewish youth in volunteer programs.
• Increased number of hosted or facilitated events geared toward the Jewish community.
Goal 3
Driving Innovation
Embrace innovation to further operational excellence and advance the human services sector.

Objectives
• Implemented processes for future-planning that embrace ideation and are connected to the strategic plan, annual action planning, and budgeting.
• Demonstrated improvement in the processes that enable teams to work more efficiently, effectively, and collaboratively.
• Application of new or enhanced approaches to client services and programs.
• Demonstrated use of data to inform programs, services, and internal operations.

Goal 4
Committing to Equity
Proactively counteract inequities inside and outside of the organization by putting equity at the center of our work.

Objectives
• Completion of an Equity, Diversity, and Inclusion (EDI) plan and initial progress on priority strategies.
• Establishment of three employee resource groups to advance opportunities and ensure a voice for communities of employees.
• Evidence that the staff at JFS understand the commitment and steps being taken at all levels of the organization to support and advance EDI.

Goal 5
Valuing Our People
Attract, develop, and retain a mission-driven, diverse workforce, and volunteer corps.

Objectives
• Compensation philosophy and strategy is implemented and staff understand how compensation decisions are made by June 2021.
• Continued positive rating (roll-up rating) by staff of JFS workplace experience regarding communication, public health, physical security, development opportunities, and workplace practices.
• Managers and above have the skills and tools to provide coaching and support staff.
• Continued positive rating (roll-up rating) by volunteers of the JFS volunteer experience.
Goal 6
Securing Today, Planning for Tomorrow
Develop significant, sustainable, and flexible sources of funding and resources.

Objectives
• Increased new or expanded number of annual government contracts over $1 million.
• Achieved the Centennial Countdown Campaign goal prior to deadline.
• Increased number of new $10,000+ gifts through new donors or increased giving.
• Increased number of new $100,000+ individual or foundation gifts.
• Increased revenue from CARS to $4M+ within 3 years.
• Increased number of earned-revenue opportunities by 2025.

Goal 7
Enhancing Governance
Maintain strong Board leadership and governance.

Objectives
• Increased Board representation by expertise in key strategic growth areas (e.g., housing, healthcare, etc.) by 2023.
• Increased Board representation by race and non-Jewish by 2023.
• Improved Board Source score on any measure below 3.25 in the 2020 survey (by 0.5 points by 2023).
• Active participation of Board members in Blueprint implementation.

*NOTE: Initial baseline data will be collected in Year 1. Specific numeric targets will then be set for selected objectives.

Implementation and Oversight
Implementing the Blueprint will involve the collective efforts of JFS staff and Board. Overall, the CEO and COO are responsible for directing implementation efforts, which are outlined in the Implementation Plan, an internal document under separate cover. The Implementation Plan outlines specific action steps under each strategy that provide clear, practical guidance to assigned leaders on how to proceed in implementing each strategy. Each action step provides details including: lead and support roles; time frame for completion; and specific resource needs, if any. In addition to their active roles as champions of the plan, oversight will be the responsibility of the Board of Directors.
Appendices

Acknowledgements
Thank you to everyone who participated in the strategic planning process to develop the Blueprint For Impact.

Board of Directors
Adam Welland, Chair
Emily Jennnewein, 1st Vice Chair
Deborah Bucksbaum, 2nd Vice Chair
Sheldon Derezin, Treasurer
Joel Smith, Secretary
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Rabbi Mendy, Chabad Poway
Rabbi Daniel Reich, Adat Yeshurun
Rabbi Yael Ridberg, Dor Hadash
Rabbi Shulman, Beth El
Cantor Cheri Weiss, San Diego Outreach Synagogue
Madrikha Beverly Zarnow, Kahal Am
Detailed Planning Process

Over an eight-month period between January 2020 and August 2020, JFS and MIG conducted an extensive planning and engagement process involving interactive meetings, one-on-one interviews, and questionnaires to develop the Blueprint.

The “Core Team” included the Board Chair, Chief Executive Officer, and Chief Operating Officer, which provided process guidance and coordination for development of the Blueprint. The “Leadership Team” included the Core Team in addition to key executive staff and Board members, which advised on the plan development and operational considerations. The staff workgroups developed the implementation steps.

The assessment consisted of the following activities:

**Board of Directors Retreat and Meetings:** The retreat served as the kick-off to the planning process, where the Board discussed their perspective as relating to upholding Jewish values, “Key Questions” that should inform the planning process, and strengths and weaknesses of the organization. Subsequent meetings served as check-in points.