

Collat Jewish Family Services Strategic Plan

Facilitated by Lumen Impact Group
Summer 2023

**BECAUSE THE WORLD NEEDS
YOUR GREATEST IMPACT**



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History and Context

For more than thirty years, Collat Jewish Family Services (CJFS) has provided comprehensive support to Birmingham seniors and families through its unique approach to care. CJFS's programming reaches a broad range of people from fertility support and counseling to case management and personal care services for seniors. Support is provided to all who seek it regardless of race, religion, or socio-economic standing.

Having shifted its focus to older adults more than 9 years ago, today CJFS is known in Birmingham for its approach to senior care including its CARES, Senior Solutions, and Transportation programming which work to provide all seniors with the opportunity to age in place with dignity. As the aging community continues to increase in size throughout Birmingham and the country, these needs have continued to increase as the workforce to supply them has been on the decline.

After weathering the pandemic and continuing to provide excellent care, CJFS entered this Strategic Planning process first hoping to gain perspective on its current programming successes and community and stakeholder perceptions. The second goal of this process has been to look ahead to what could be next as CJFS plans to grow and make an even greater impact in Birmingham. This process and the work of the Strategic Planning Team named below led to the three-year strategic plan outlined in these pages.

Strategy Development Team

- Staff: Lauren Schwartz, Carolyn Pevey, Pam Leonard, Leigh Cohen Long (Consultant)
- Board Members: Faye Levin, Kay Kornmeier, Steve Brickman, Barbara Royal, Steve Royal, Karri Neal, Jessica Rhodes, Lacey Epstein, Toby Siegel, David Romanoff (former board member)

Needs Analysis

CJFS is lauded by all who have experienced its services as a client, volunteer, partner, staff member, board member, or community member. The care with which it treats every client and the services that it provides to the community of Birmingham are not only essential but delivered with excellence. Stakeholders across the board believe CJFS plays an integral role in the community for seniors and families, corroborated by feedback from clients and families it serves. The staff at CJFS are committed to the organization and its mission and are fulfilled by their employment. Additionally, CJFS is well resourced and financially stable, allowing the organization to focus on improving and growing in the next three years.

The aging population is projected to continue its exponential growth over the next two decades with the aging of the Baby Boomer population and the increase in life-expectancy. Through the strategic planning process, we identified that community understanding of who CJFS serves and what services are available is a significant barrier to the organization's growth even as the aging population grows. There are significant misunderstandings in the community at large around the fact that CJFS is for everyone, regardless of financial means or religious affiliation. Paradoxically, people who are not of the Jewish faith believe that they cannot access services, and those in the Jewish community believe CJFS is not doing enough to serve their needs. In addition, stakeholder perception is that the organization only serves lower socio-economic clients. Through focus group and outside stakeholder feedback, we learned that people across demographics are hungry for knowledge and access to the kind of services and expertise that CJFS offers, but do not know that CJFS can meet their needs.

Another barrier to growth is staffing. While existing staff are satisfied and successful in their work, the market of qualified staff is limited. To address this issue, CJFS must expand current recruiting and retention strategies to attract and retain high quality employees.

Opportunities abound for CJFS to expand upon current successful programming, doing what it does best, while serving more clients, particularly fee-paying clients. By expanding our fee-paying client base, the capacity to serve those less able to pay for services can also increase. Additionally, CJFS's impact and desirable flexibility as an organization has the potential to draw more prospective staff in and to grow and expand services as it focuses on outreach to potential clients, their families, potential staff, and partners. This outreach can position CJFS with all stakeholders in a way that shows the true potential of the impact that it continues to make in order to dispel misunderstandings and increase awareness and access overall.

Strategy

Mission

CJFS enhances quality of life and strengthens independence for individuals and families with a primary focus on older adults by providing exceptional support services in accordance with Jewish values.

Vision

Individuals and families will have a place to turn to for support, guidance, and compassion as they face life's challenges.

Strategic Priorities

Through the strategic planning process, CJFS has identified the following priorities to expand impact over the next three years by promoting greater visibility for the organization and greater understanding of our work among potential clients, employees, funders, and the community at large.

- Enhancements to Services
- Outreach
- Human Capital
- Fund Development

Goals, Objectives, and Metrics

Enhancements to Services

VISION STORY FOR 2025

CJFS is the premier provider of older adult services and care in the Birmingham area because of our reputation grounded in effective approach, expertise, and excellent service. Our programmatic/services model has been identified as best in class in our community, and the demand to access our programs/services continues to challenge our capacity. When a question around "What do I do about x with my aging parent/friend/neighbor?" or "How do I work through my feelings/concerns?" emerges, CJFS is the first stop for confidential and professional services. If we don't have the support services to meet clients' needs, one of our community partners is there as a referral or to call on for additional support.

By growing services to families and seniors with financial resources to pay for services, CJFS also increases the number of clients served who are economically disadvantaged. This blend of

clients has led to expanding from one service delivery model to many avenues of delivery while also creating a more sustainable programming business model. These changes have allowed for the expansion in staff to serve more clients. This past year, we have served more clients with best-in-class programming/services than ever before.

GOAL 1

Expand current best-in-class services to generate impact aligned to the mission and improve financial sustainability.

Objectives

1. By Summer 2023, refine senior solutions services to package, deliver, and structure fees in different ways to serve clients of diverse economic statuses.
2. By Summer 2024, expand Personal Care and Counseling staff to serve more clients.
3. By Fall 2024, refine and broaden dementia and caregiver support programming to package/deliver in different ways.
4. By Winter 2025, create a plan to consistently review all programming for impact, sustainability, and operational efficiency.

Key Performance Indicators	Baseline	2024	2025	2026
Annual growth in number of clients served as measured by client records.	X%	X%	X%	X%
Annual growth in service hours as measured by client records.	X%	X%	X%	X%
Annual growth in full fee-paying clients and in subsidized clients as measured by client records.	X% fee-paying X% subsidized	X% X%	X% X%	X% X%
Clients report that they have an improved quality of life with the help of CJFS’s services as measured by client survey.	X%	X%	X%	X%
Growth in number of clients who can age in place.	X	X	X	X

GOAL 2

Develop an expanded, comprehensive support network of services for older adults to meet needs identified by current clients and community partners.

Objectives

1. By Fall 2023, develop plan to focus efforts on unmet needs identified by internal and community partnership data.
2. By Spring 2024, develop partnerships with other vetted senior service providers to fill gaps in needs outside of CJFS capacity.
3. By Fall 2024, develop process for families/caregivers to identify, understand and access the various senior services in Birmingham.

Key Performance Indicators	Baseline	2024	2025	2026
Annual growth in referrals to CJFS that result in establishment of new clients as measured by call center records.	X%	X%	X%	X%

Outreach

VISION STORY FOR 2025

CJFS has developed clear and consistent messaging to a variety of audiences about what we do, who we serve, and how we change lives. The Birmingham community is not only clear about the incredible services offered by CJFS, but everyone knows that anyone in need of support or services is welcome and encouraged to call.

Our volunteer and outreach programs are engaging greater numbers of community members in meaningful opportunities to help themselves and/or others, not only expanding our impact, but also creating a pipeline of clients and donors. In addition, a targeted outreach approach to cultivate relationships has resulted in new service partnerships, referral resources, and enhanced business community relationships, which ultimately drive revenue. Finally, there is greater our overall funding and support as donors, funders and volunteers have a greater understanding of the impact of their gifts of time and financial resources.

GOAL 1

Enhance CJFS's communication to support brand awareness and name recognition.

Objectives

1. By Fall 2023, build CJFS team/consultant capacity in outreach and communication.
2. By Fall 2023, review current messaging practices to identify current successes, gaps, and opportunities and audiences receiving outreach efforts.
3. By Winter 2024, define the branding & messaging of CJFS's mission and services and audiences for outreach efforts.
4. By Winter 2024, create and implement a strategic outreach and marketing plan for targeted outreach efforts.

Key Performance Indicators	Baseline	2024	2025	2026
Increase in new clients served by CJFS as measured by client records.	X%	X%	X%	X%
Increase in paying clients being served by CJFS as measured by client records.	X%	X%	X%	X%
Number of media "hits" as measured by media tracking service.	X	X	X	X

GOAL 2

Cultivate potential clients, volunteers, and donors through targeted relationship building and programming.

Objectives

1. By Spring 2024, review current relationships to identify gaps and opportunities to expand CJFS's reach.

2. By Summer 2024, identify and cultivate new partnerships that will fill current gaps to strengthen CJFS's ability to increase community/potential client awareness of CJFS.
3. By Spring 2025, consistently review and solicit feedback around relationship impact on increasing the awareness of CJFS.

Key Performance Indicators	Baseline	2024	2025	2026
Annual increase in referrals made to CJFS as measured by client intake records.	X%	X%	X%	X%
Increase in new clients served by CJFS as measured by client records.	X%	X%	X%	X%
Increase in paying clients being served by CJFS as measured by client records.	X%	X%	X%	X%
Increase in community presentations as measured by presentation records.	X%	X%	X%	X%
Increase in volunteers supporting CJFS efforts as measured by volunteer records.	X%	X%	X%	X%
Increase the number of new referral sources annually.	X%	X%	X%	X%

Human Capital VISION STORY FOR 2025

Because CJFS is recognized as the premier agency in providing quality senior services, it is now an employer of choice in Birmingham for anyone looking for a career in the sector. Staff is dedicated to the mission and vision of CJFS and is highly satisfied with their work culture and impact.

As an organization, we have hired and retained excellent staff for all positions needed to implement the vision of CJFS. We also strongly believe succession planning is essential to the continuity of CJFS, and as a result, we have built a strong “bench” of staff who are able to lead alongside existing or future leadership. Because of the commitment, passion, and strength of our motivated staff, we are providing the highest quality services to the seniors in the community.

GOAL 1

Implement an effective recruitment strategy extolling the benefits of CJFS employment in order to reach potential employees and provide qualified candidates for available positions.

Objectives

1. By Fall 2023, identify expertise to aid in the development of recruitment strategy.
2. By Winter 2024, communicate the ethos and culture of working at CJFS in recruitment.
3. By Winter 2024, utilize new flexible methods including outreach/marketing to reach potential employee audiences including internships and collaborations with other local agencies.

Key Performance Indicators	Baseline	2024	2025	2026
% Positions fully staffed as measured by staff records.	X%	X%	X%	X%
% Clients reporting satisfaction with quality of CJFS staff	X%	X%	X%	X%

GOAL 2

Hire and retain a highly qualified and motivated staff.

Objectives

1. By Fall 2023, develop a strategic organizational chart aligned to the needs of seniors and CJFS mission overall, that is mindful of available funding.
2. By Fall 2023, develop competitive compensation packages to hire and retain the best and brightest.
3. By Winter 2024, develop written values reflecting the ethos and culture of CJFS aligned to the mission.
4. By Summer 2024, create and implement a meaningful performance evaluation framework.

Key Performance Indicators	Baseline	2024	2025	2026
% Positions fully staffed as measured by staff records.	X%	X%	X%	X%
% Employee satisfaction at CJFS as measured by the annual staff survey.	X%	X%	X%	X%

GOAL 3

Provide relevant Professional Development to increase staff satisfaction, capacity, and skills.

Objectives

1. By Summer 2023, establish a regular calendar for PD days to build staff skills and capacity.
2. By Fall 2023, establish internal supervision toward advanced social work credentials.
3. By Fall 2024, develop ways to recognize, both internally and externally, staff accomplishments and dedication.
4. By Fall 2025, develop leadership opportunities for staff with an eye on succession planning.

Key Performance Indicators	Baseline	2024	2025	2026
Clinical staff have received advanced credentials during their CJFS tenure as measured by staff records.	X%	X%	X%	X%
Staff state that they have been given the opportunity to lead an initiative or project in the past year as measured by the staff survey.	X			X
% Staff state that CJFS positively contributes to their professional skill development as measured by the annual staff survey.	X%	X%	X%	X%

Fund Development

VISION STORY FOR 2025

CJFS is raising more funds than ever before from a broader cross-section of sources, including individual donors, corporate donors, private foundations, and government grantors. The impact of our work on our clients and the community is well understood by our informed, committed funders.

We have strategically invested in fundraising and outreach staff not only to build our fundraising dollars, but also to expand our client base. The Fund Development and Outreach Department is professionally and

adequately staffed with clear goals and objectives using data to drive our approach to stewardship and donor development. In addition, board members serve as ambassadors for CJFS and are trained and actively engaged in fundraising. As a result of these strategies, CJFS continues to be a financially stable organization and has increased its ability to be nimble and evolve, investing resources for the benefit of our clients and the Birmingham Community.

GOAL 1

Enhance CJFS’ long-term financial sustainability and organizational capacity through elevated fund development.

Objectives

1. By Summer 2023, evaluate and improve internal Fund Development operations.
2. By Fall 2023, allocate endowment dollars to enable the accelerated growth of key initiatives.
3. By Fall 2023, develop donor relations & stewardship plan to support increased giving levels and retention of donors.
4. By Spring 2024, expand and diversify donor base targeting areas of potential growth.
5. By Summer 2014, expand and diversify grant sources to include local/state/federal/national funders.

Key Performance Indicators	Baseline	2024	2025	2026
# of individual donors	X	X	X	X
# of donors outside of the Jewish community as measured by donor records.	X	X	X	X
# corporate donors as measured by donor records.	X	X	X	X
Annual donor retention rate.	X%	X%	X%	X%
Annual conversion rate of volunteers to donors	X%	X%	X%	X%
Dollars raised from individual & corporate donors	X	X	X	X
grant dollars from new sources	X	X	X	X

GOAL 2

Increase board engagement in the fund development process to enhance and solidify the future of the foundational support of CJFS.

Objectives

1. By Fall 2024, expand the engagement of board members in fundraising efforts through the collective development of prospects, cultivation efforts, solicitations and follow up, all supported by training and tracking mechanisms.
2. By Fall 2025, develop connections with and engage potential future board members with new networks and/or skill sets in applicable board activities.

KPIs	Baseline	2024	2025	2026
% board members personally involved in fundraising as measured by the annual board assessment.	X%	X%	X%	X%
Dollars raised as a result of board connections to potential new relationships/partners/funders.	X	X	X	X

Appendix A- Governance

Current Board of Directors:

Officers	Board of Directors	Advisory Council
<ul style="list-style-type: none"> • President, Faye Levin • Vice President, Kay Kornmeier • Vice President, David Ovson • Vice President, Stephen L. Royal • Treasurer, Lacey Epstein • Secretary, Toby Siegel • Past President, Joyce T. Shevin • Executive Director, Lauren Schwartz 	<ul style="list-style-type: none"> • Natalie Asman • Rebecca Boykins • Steven A. Brickman • Andrew S. Duxbury, MD • Lisa Kianoff • Andrea McCaskey • Karri Neal • David Reese • Jessica S. Rhodes • Barbara Royal • Ann Todd • Gary Weintraub • Deborah Wiatrak, MD • Seth Wolnek 	<ul style="list-style-type: none"> • Brooke Bowles • Brian Cain • Danny Cohn • Sally Friedman • Rabbi Steen Henkin • Rabbi Yossi Posner • Rabbi Adam Wright

Appendix B- Methodology

The strategic planning process, which kicked off in Winter of 2023, began with data collection and analysis grounded in best practices and in mixed methods research methodology, including a rigorous approach to qualitative data use (10 interviews with stakeholders) and a balanced and informed use of quantitative internal outcome data, staff survey, and a landscape scan.

Initial data collected includes:

- Interviews with 10 stakeholders
- Survey of current staff
- Analysis of internal outcome data
- Analysis of external landscape data

The first round of data collection helped to drive the Strategic Planning process and grounded the Strategy Development Team in robust data on CJFS' current state. The resulting 3-year strategic plan is designed around that current state, as described by diverse stakeholders, and the organization's vision for success and growth, as refined and articulated during the initial strategic planning sessions.

Following the initial Strategic Plan draft creation, Lumen Impact Group conducted a series of 6 more stakeholder interviews in Spring 2023 along with 2 focus groups of potential clients and caregivers. This feedback was used to help test foundational strategy elements and provide greater insight into perceptions and potential options for the path forward. Lumen asked stakeholders questions around their

experience with or desires for initiatives associated with CJFS' planned strategic priorities to help provide additional insight into its future direction. Interviews were conducted with leaders of other Jewish Family Service organizations serving senior populations with similar programming as well as other agencies in Alabama serving similar populations including the United Way Area Agency on Aging, AARP, and the Jefferson County Department of Health.

The Strategy Development Team represented diverse voices from across the organization and was recruited by CJFS leadership in consultation with Lumen around team development best practices. The resulting team engaged in two facilitated in-person sessions and a number of strategic priority work group sessions. After the second full team session, a number of board and leadership follow-up meetings advanced the ongoing strategic discussions and refinement of tracking processes.