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Strategic thinking rarely occurs spontaneously

— Michael Porter, renowned academic and professor at Harvard Business School
Executive Summary

During the strategic planning process, we collaborate and define a road map for moving forward. The Agency completed its last strategic plan in 2015; it was a five-year plan that ended in 2020. Our professional staff worked alongside Board Members to develop goals, objectives, strategies and a shared vision for success.

While we would normally propose another five-year plan, these are unprecedented times. Given the uncertainties that still lie ahead in regard to COVID-19, we have created a three-year plan that can be modified and updated as needed. We’ll make appropriate changes as we gain more clarity about the course of the pandemic and the needs of the community as a result.

About Our Process

Our planning process began in Fall 2019 with a retreat for the Board at JFS’ Weisman Delray Community Center. During this time, we:

- Reviewed the prior plan’s successes and failures;
- Re-confirmed our commitment to the Agency’s Mission and Vision Statements; and
- Educated ourselves on key demographic information.

Based on interest, Board members chose to participate in one of five subcommittees. Working closely with key staff, the subcommittees developed goals and objectives which are the basis of this plan. It was our intention to have a draft ready for approval at our Spring 2020 Annual Meeting, however the pandemic intervened. We suspended our process so we could focus on developing and delivering services to the community in safe and effective ways while also pivoting to a primarily virtual format.

The subcommittees began meeting again in October 2020 and presented a new strategic plan to the Board of Directors which was approved at the January 2021 governance meeting.

This report is the culmination of our collaborative process and will be our roadmap over the next three years as we begin the implementation process.
Our first step was to reconfirm our commitment to the Agency’s Mission and Vision Statements:

Mission:

To offer help, hope and humanity through our comprehensive range of programs and services which support people of all ages and beliefs.
Vision:

To continue as the premier human service agency in south Palm Beach County, providing a continuum of services for individuals and families at all stages of life.
Key Demographics

In 2018, the Jewish Federation of South Palm Beach County presented the findings of its demographic study. It was designed to help communal leaders, planners, and residents understand the size and character of our community for planning purposes. The study was conducted by the Cohen Center for Modern Jewish Studies and the Steinhardt Social Research Institute at Brandeis University. This research, as well as national and local statistics and information, provided us with the following findings.

POPULATION

- South Palm Beach County’s (SPBC) Jewish population is made up of 134,200 adults and children living in 69,000 households, constituting about 1/3 of the area population.

- 44% of SPBC Jewish residents are age 65+.

- Nearly 20% of the Jewish households in South Palm Beach County are living on the economic edge — meaning they don’t have enough cash to cover an unexpected emergency expense.

- 27% percent of Jewish households do not have enough savings for 3 months’ expenses.

- In the past year, 13% percent of Jewish households received a public welfare benefit, and 19% experienced an economic hardship.

- 15% of Jewish adults aged 65-79 and 12% of those 80+ reported they are “just getting by.” This means 27% or 12,320 adults aged 65+ are living on the economic edge.

The United Way’s 2020 ALICE (Asset Limited, Income Constrained, Employed) Report indicates that one-in-three households in Palm Beach County are economically insecure. They are the “working poor” and were the households, both Jewish and not, most greatly affected by the COVID-19 pandemic.
According to the U.S. Dept. of Housing and Urban Development, since 2011, Palm Beach County’s median family income increased 17% while the median sales price of a single-family home increased 78%.

Nearly 40% of all households in Palm Beach County spent more than 30% of their gross income on housing costs.

2018 Palm Beach County Adjusted Median Income (AMI) was: $62K; for those 65+ it was $51K.


28% of Jewish households in South Palm Beach County include at least one person with some kind of health issue, special need, or disability.

In 17% of all Jewish households, at least one person is limited in their ability to work and/or perform school or housework.
The AARP’s Public Policy Institute issued a report suggesting that potential caregivers will be in much shorter supply starting in 2026 — when the first boomers begin to turn 80. According to the report, there will be a shortage of paid and unpaid caregivers, (typically, family or close friends) home-care aides and personal-care attendants.

By 2030, the "caregiver support ratio" (the proportion of people in prime caregiving years to those age 80 or above) will drop from 6.0 to 4.1, then plunge to 2.9, by 2050, according to AARP’s projections. Reasons include:

- Longer life spans.
- Smaller families with less children to assist with care.
- Increased rates of those with disabilities.
- Individuals choosing to have no children.

This shortage in caregivers will result in a higher cost for homecare aid and an increased reliance on technology and volunteers to assist in the care of older adults.
Give me six hours to chop down a tree and I will spend the first four sharpening the axe.

— Abraham Lincoln
Goal 1: Infrastructure

Plan for the future physical infrastructure needs of the agency.
OBJECTIVE 1
Assess current and future needs of staff, including how and where we work post COVID-19.

STRATEGIES:
Work with an architect and/or space planner to determine actual space needs and requirements.
Cost: $30K

OBJECTIVE 2
Determine funding needs/capital campaign.

OBJECTIVE 3
Raise funds for building/renovations/remodel.
Goal 2: Seniors

Enable isolated, homebound seniors to age in the place they feel most comfortable, regardless of ability to pay.
The number of seniors living in our community is projected to grow exponentially over the next 10 years, and the caregiver shortage issue will result in higher costs for paid homecare workers. Knowing those competing constraints, we must plan to continue to meet the needs of our seniors while allowing them to safely age in place.

**OBJECTIVE 1**

Use innovative technology to reduce isolation and loneliness and improve access to socialization to supplement face-to-face care.

**STRATEGIES:**
Seek funding for programs such as Uniper/Zoom/Access Robotic Pets/other assisted technologies.

**OBJECTIVE 2**

Use volunteers to broaden the capacity of services to assist those aging in place.

**STRATEGIES:**
Increase the number of volunteers for seniors; continue to implement and develop senior-focused volunteer programs such as those for shopping, assisting with simple house chores, and helping seniors feel more comfortable with technology.
OBJECTIVE 3
Reduce the number of older adults who do not have food security.

STRATEGIES:
Seek additional funds to serve more seniors in this category.

OBJECTIVE 4
Design innovative programs to enable seniors living on a fixed income to remain at home with the support they need to do so.

STRATEGIES:
- Substantially increase the funds available for subsidized homecare via annual gifts and/or endowments, depending on what we are able to raise or distribute from our available funds. (Y1 Goal - $120K; Y2 Goal - $240K; Y3 Goal - $480K).
- Identify local partners to develop a “shared housing program” for older adults with wrap around services provided by JFS.
- Identify local partners to establish an attainable housing bridge fund endowment with a goal to raise $4M for homeless prevention services such as financial assistance, home modifications, housing consulting, or other.
Goal 3: Families and Children

Plan for the future needs of at risk families and children, including those with special needs.
OBJECTIVE 1
Use innovative technology to allow families to access the services they need in a manner best suited for them.

STRATEGIES:
Develop a live-stream education program. Create a pre-recorded webinar series for topics identified as greatest need. Use tele-health as a modality for therapy.

OBJECTIVE 2
Use volunteers to assist families and children to overcome immediate crisis.

STRATEGIES:
Identify volunteers with backgrounds in social work finance and budgeting, to work with families living on the economic edge.

OBJECTIVE 3
Find innovative ways for families living on the economic edge to become more self-sufficient.

STRATEGIES:
Create education and programming around achieving long-term financial stability, sustainable employment and job retraining.
OBJECTIVE 4
Find innovative ways to help at-risk children learn the tools necessary to manage their individual mental health needs.

STRATEGIES:
Create programming for different age groups. Enlist parents to support education and awareness for mental health topics of community interest.

OBJECTIVE 5
Assist children with special needs to live to their fullest potential by providing affordable access to therapies and services in a “one stop shop.”

STRATEGIES:
Create a Therapeutic Family Resource Center (TFRC) to provide therapies on a sliding scale basis, along with workshops, support groups, information and referral and family consultations to serve this population.
Goal 4: Revenue/Fundraising

Sustain the agency through diversified revenue streams.
**OBJECTIVE 1 (FEE-GENERATING)**

Double Medicare revenue to $500k (Net).

**STRATEGIES:**

Co-locate therapists in other medical settings and increase revenue generated from psychiatry billing through FAU partnership.

**OBJECTIVE 2 (LEGACY)**

Grow legacy expectancies 10% year over year.

**STRATEGIES:**

Engage with board members, estate planning attorneys, financial planners and other professional advisors to increase legacy commitments by 10% year over year.

**OBJECTIVE 3 (YOUNGER DONORS)**

Engage with donors 55 or younger.

**STRATEGIES:**

Create new events designed specifically to attract this age group, including opportunities for families to volunteer.

**OBJECTIVE 4 (ANNUAL GIVING)**

Continue to grow the donor base.

**STRATEGIES:**

Work towards moving donors up to higher giving categories while maintaining current major donors and adding new donors in each category.
Goal 5: Community Engagement
Actively engage the community through volunteering and education.
OBJECTIVE 1
Create a diverse volunteer experiences and increase opportunities for individuals of all ages—including families, teens, college-aged students and individuals with special needs.

STRATEGIES:
Expand volunteer opportunities to include nights and weekends. Identify ways families can volunteer together. Continuously create new volunteer programs to meet community needs.

OBJECTIVE 2
Find ways to educate those unfamiliar with JFS.

STRATEGIES:
- Establish an “Ambassador” program for various constituent groups and train them about JFS programs and services so they can become “go to” people within their specific constituent group or the community at large.
- Create guidelines and a training program; identify possible affinity groups/individuals to train as Ambassadors; complete training for the first group of Ambassadors.
- Complete training for two more Ambassador groups; refine program.
- Continue to refine and tweak the program while training additional groups.
Alone we can do so little, together we can do so much.

— Helen Keller
Conclusion

This plan is bold and innovative, and will require the continued efforts and focus of the JFS Board of Directors and staff in order to be successfully implemented over the next three years. JFS would like to acknowledge the work of the various task forces for their efforts. Together, we will ensure the future of our agency and our ability to meet the needs of the community as they arise.

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