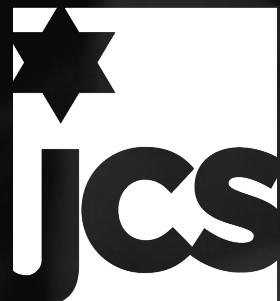


Essential Elements to Strategic Planning



**Jewish
Community
Services**
OF SOUTH FLORIDA



JF&CS
ATLANTA



*Leopoldo (Polo) Coronado
Chief Administrative Officer
JCS of South Florida*



*Omrit Shimoni, LMHC
Director of Quality Improvement
and Strategic Initiatives
JCS of South Florida*



*Vera Golden
Chief Program Officer
JF&CS of Atlanta*



*Amanda La Kier
Chief Marketing &
Development Officer
JF&CS of Atlanta*



*Lauren Harris, Ph.D.
Leadership & Engagement
Officer
JF&CS of Atlanta*

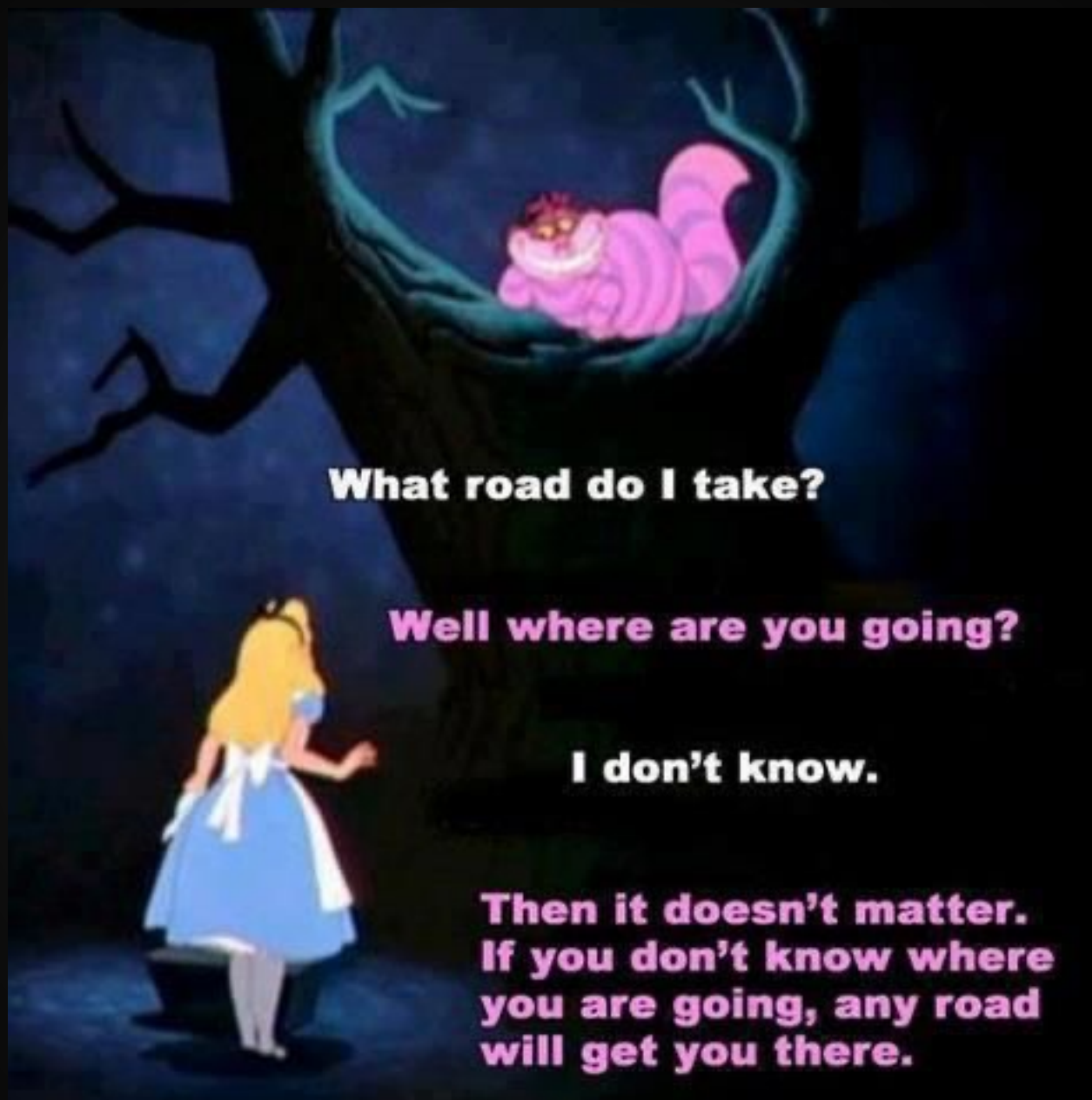


What you'll learn:

Participants will be able to understand concepts and elements of a solid and engaging Strategic Plan.

Participants will identify value-based strategies that have the potential to achieve the greatest impact.

Participants will gain insights in identifying challenges encountered during the Strategic Planning process and learn positive approaches to empower their team.



What road do I take?

Well where are you going?

I don't know.

**Then it doesn't matter.
If you don't know where
you are going, any road
will get you there.**



**Jewish
Community
Services**
OF SOUTH FLORIDA



OUR MISSION

To improve the quality of life and self-sufficiency of the Jewish and broader communities throughout South Florida in accordance with Jewish values.

OUR VISION

The vision of Jewish Community Services is to be recognized as the leading provider of innovative services and programs that address existing and emerging social service needs.

OUR VALUES

- **Embrace Jewish Values.** Providing services within the context of Jewish ethics and values
- **Collaboration.** Securing new partnerships, and enhancing existing strategic partnerships
- **Client-Centered/Mission-Driven.** Being responsive to client needs
- **Financially Sound.** Responsible fiscal stewardship
- **Quality.** Offering a single high standard of quality services
- **Accountability.** Maintaining a high standard of integrity and accountability
- **Diversity.** Cultural humility and competence. Embrace and promote an inclusive, welcoming, and affirming culture

WE WELCOME JF&CS ATLANTA TO PRESENT ON VALUES LATER IN THIS PRESENTATION



JCS SERVICES



**ACCESS
SERVICES**



**CHILDREN'S
MENTAL HEALTH
COUNSELING**



**SENIOR
SERVICES**



**KOSHER FOOD
BANK**



**HOLOCAUST
SURVIVOR
ASSISTANCE**



**LGBTQIA+
PROGRAMS**



**CAREER AND
EMPLOYMENT
SERVICES**



**211-MIAMI
HELPLINE**



**DOMESTIC ABUSE
PREVENTION**



**YEHI OHR - SERVING
THE ORTHODOX
COMMUNITY**



**J-RAP - REFUGEE
ASSISTANCE**



CRISIS RESPONSE

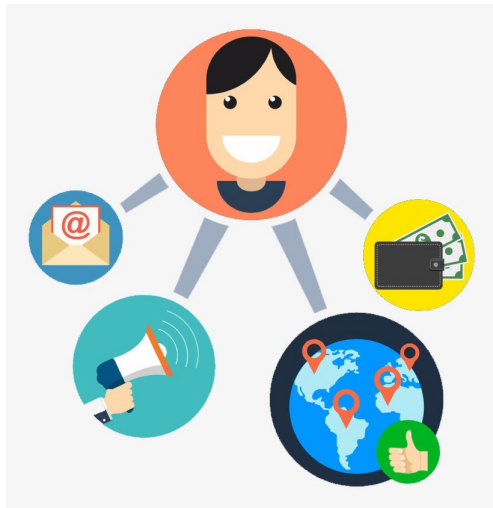
JCS CENTERS OF EXCELLENCE



Counseling



Case
Management



Information
& Referral



Food
Sufficiency

Elements of Strategic Plan



O = Objectives... What (Words)

G = Goals... What (#s)

S = Strategies... How/Choices (Words)

M = Measures... How/Choices (#s)

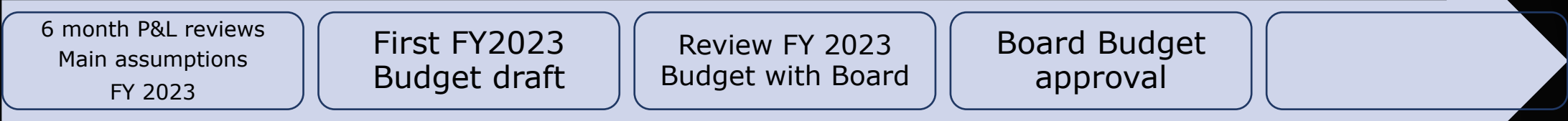
OKR = Objective Key Results



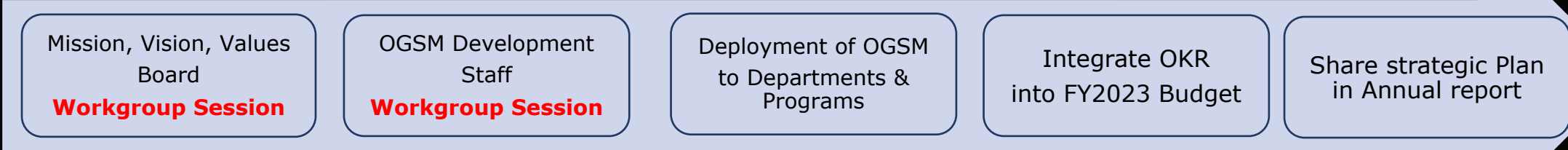
JCS Strategic Plan 2022-2028 Roadmap



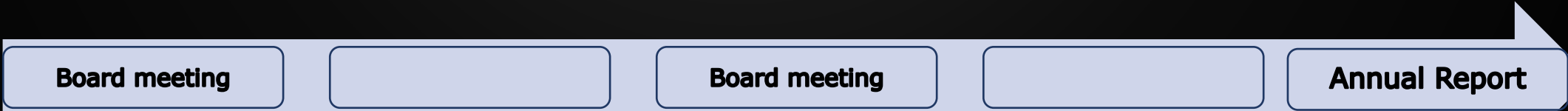
Budget FY 2023



Strategic Plan



Board Meetings



Workgroup Sessions

Independent Consultant facilitated workgroups with Board and Staff

Board members identified “Winning Moves”

- Brainstormed strategies surrounding the 3 Objectives
- Members voted on their top 3
- Tally of votes ranked

Same process for JCS Executives and Directors

Merged top scores from Board and Staff to develop Strategic Plan

Examples of Objectives, Goals, Strategies and Measures

Objectives

1. Make a significant, measurable, positive **IMPACT** in our community.
2. Strengthen and ensure **FINANCIAL STABILITY**.
3. Ensure **ORGANIZATIONAL CONTINUITY & CAPACITY**.

Goals

- 1.1 # of Clients Served
- 1.2 # of Community Partnerships
- 2.1. Overhead below 15%. 14% by 202x
- 2.2. Top 5 programs self sufficient (no deficit) by 202x
- 3.1. Increase Staff retention by x%

Strategies

- 1.1. Consolidate programs and growth (scale) around Centers of Excellence: **COUNSELING; CASE MANAGEMENT; INFORMATION & REFERRAL; FOOD SUFFICIENCY** (Assign OWNERS)
- 2.1. Automate HR and Fiscal to enable paperless back office (Assign OWNERS)
- 2.2 Establish & Grow Endowment (Assign OWNERS)
- 3.1. Build high performance culture for Staff (Assign OWNERS)
- 3.2 Strengthen Board leadership development (Assign OWNERS)

Measures

- 1.1 90% of Clients served will be overall satisfied with services.
- 2.1 Paperless back office by June 202x
- 2.2 Raise \$x by 202x
- 3.1 Facilitate quarterly staff development trainings

ACTIVITY & DISCUSSION

Identify one area of IMPACT for your organization.

1. What would you like to achieve? (GOAL)
2. How will you meet this GOAL? (STRATEGY)
3. What types of challenges will hinder meeting your GOAL?
 - Not enough Staff?
 - Not enough Time?
 - Not enough Resources?
 - Not enough Buy-In?
4. Discussion – how can we address these challenges?

“Culture eats strategy
for breakfast”

-Peter Drucker

What values guide your agency?



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JEWISH FAMILY & CAREER SERVICES

COMPASSION



HEALING



KINDNESS



HOPE



HONESTY



INTEGRITY



RESPECT



IMPROVEMENT



COLLABORATION



DIVERSITY

Guided by our Core Jewish Values

- We serve with **COMPASSION** and empathy and are passionate about the work we do to reach our common purpose.
- Through acts of **HEALING**, we strive to strengthen our community by providing outstanding services with **KINDNESS**.
- We message **HOPE** and positive thinking in every client engagement.
- We treat our colleagues, clients, volunteers and partners with **HONESTY** and **INTEGRITY** and **RESPECT** at all times.
- We look for ways to **CONTINUOUSLY IMPROVE** and innovate so we can provide best-in-class services and offer new programming according to our mission and clients' needs.
- Building community through **COLLABORATION** is a priority. We rely on volunteers, donors and each other as well as seek partnerships to benefit our clients.
- With the belief in the uniqueness of every human, embracing our **DIVERSITY** is central to our mission. We all have gifts to offer and together our ideas are stronger with diverse perspectives.

We Are Guided by Our Core Jewish Values



How does this value show up in our agency?	I practice this value well.	I need to work on this value.	Our team practices this value well.	Our team needs to work on this value.	Our agency practices this value well.	Our agency needs to work on this value.
Compassion						
Healing						
Kindness						
Hope						
Honesty						
Integrity						
Respect						
Continuous Improvement						
Collaboration						
Diversity						

How do you live out your values?



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“Living Out” or Integrating Values

- Define your values
- Communicate them both internally and externally
- Integrate them into talent management systems for both professionals AND volunteers/lay leaders
 - Articulating them in recruitment & selection
 - Highlight them during the onboarding process
 - Integrate into the performance management process (for professionals)
 - Provide feedback related to them.
 - Develop them through opportunities to learn & grow.
 - Recognize & reward those that play by them.

Thank You For Joining Us



JF&CS
ATLANTA