



**2015 – 2018 STRATEGIC PLAN**

**March, 2015**

## **JEWISH FAMILY SERVICE CALGARY (JFSC)**

### **Mission**

Jewish Family Service Calgary strengthens communities by providing social services to individuals and families based on the Jewish values of compassion, social justice and improving the world.

### **Guiding Principles**

- We treat each individual with dignity and respect.
- We are accessible to people of all faiths and cultures.
- We work together to strengthen all communities recognizing the value of participation and collaboration.
- We are accountable to our clients and stakeholders.
- We empower individuals and families by promoting self-sufficiency.
- We respond to new ideas and emerging needs.

## **WHAT MAKES JFSC UNIQUE?**

- Jewish values guide all components of operations
- Programs and services are delivered through a holistic, client-centric approach
- The small size of the agency results in personalized services
- Programs and services are customized for the Jewish community
- JFSC is inclusive and open to all
- JFSC has a strong reputation for its expertise in service delivery
- JFSC enhances its services through collaboration with a variety of related agencies.

**EMERGING TRENDS AND ISSUES IN CALGARY'S SOCIAL SERVICES**

**CLIENT TRENDS AND ISSUES**

- ❖ Increasing complexity of mental health issues
  - individuals with multiple mental health issues
- ❖ Children struggling with mental health issues
- ❖ Strong growth of older adults population
  - lack of financial resources; need for ongoing support; impact of government cutbacks
- ❖ Immigrant challenges
  - need for immediate housing; underemployment; limited translation services
- ❖ Domestic violence
  - lack of housing services; Jewish clients delay reporting, leading to crisis situations

**COMMUNITY TRENDS AND ISSUES**

- ❖ Lack of affordable, accessible housing
- ❖ Increase in poverty
  - basic needs and food security not met; lack of transition supports
- ❖ Greater awareness of LGBT population
- ❖ Lack of preventive services
  - clients at risk of homelessness are in crisis situations
- ❖ Gaps in accessible legal services
- ❖ Government cutbacks
  - increase in referrals to agencies
  - agencies expected to fill the gaps
- ❖ Funders and donors demanding more accountability
  - increased staff time to complete reporting requirements

**2015 – 2018 STRATEGIC GOALS**

The framework for developing the 2015 – 2018 Strategic Goals was based on the following key factors:

- the unique position and role of Jewish Family Service within Calgary’s social service agencies
- major themes resulting from emerging trends and issues in Calgary’s social services
- areas where Jewish Family Service could leverage its history and expertise to gain the most impact.

The four Strategic Goals for 2015 – 2018:

- 1. Increase focus on preventive services**
- 2. Increase recognition as a leader in exceptional service delivery**
- 3. Expand JFSC relationships and partnerships**
- 4. Develop a Reserve Fund**

**2015 – 2018 ACTION PLAN**

- See following pages

**ACTION PLAN FOR 2015 - 2018 STRATEGIC GOALS**

<b>STRATEGIC GOAL:      Develop and implement a plan for expanding preventive services</b>		
<b>LEAD(S):      Executive Director</b>		
<b>MAJOR ACTIONS</b>	<b>TIMELINE</b>	<b>MEASURES OF SUCCESS</b>
1. Develop a framework for preventive services e.g. <ul style="list-style-type: none"> <li>• what does preventive service mean to JFSC?</li> <li>• what is JFSC doing now?</li> <li>• what does it need to do?</li> <li>• what is it preventing?</li> </ul>	<b>Aug 2015</b>	<ul style="list-style-type: none"> <li>• A framework is established which identifies the type and scope of preventive services to be offered by JFSC.</li> </ul>
2. Conduct research on preventive services, including: <ul style="list-style-type: none"> <li>• best practices</li> <li>• options for types of services</li> <li>• needs assessment</li> <li>• gap analysis.</li> </ul>	<b>Q2/Q3 2015</b>	<ul style="list-style-type: none"> <li>• Research findings on preventive services are completed</li> <li>• Research findings identify best practices, options and gaps in preventive service areas.</li> </ul>
3. Identify the enhancement of existing services and the initiation of new services.	<b>Q2/Q3 2015</b>	<ul style="list-style-type: none"> <li>• Strategies for enhancing existing preventive services are identified.</li> <li>• New preventive services with the highest potential impact are identified.</li> </ul>
4. Evaluate Preventive services <ul style="list-style-type: none"> <li>• Effectiveness of services</li> <li>• needs assessment</li> <li>• gap analysis.</li> </ul>	<b>Q1 2016</b>  <b>Ongoing to Q4 2018</b>	<ul style="list-style-type: none"> <li>• Ongoing evaluation of preventive services at JFSC at least annually</li> </ul>
5. Implement the plan.	<b>Q2/Q3 2016</b>	<ul style="list-style-type: none"> <li>• The plan for developing and expanding preventive services is implemented, monitored and evaluated.</li> </ul>

**ACTION PLAN FOR 2015 - 2018 STRATEGIC GOALS *cont'd***

<b>STRATEGIC GOAL: Increase recognition as a leader in exceptional service delivery</b>		
<b>LEAD(S): Executive Director</b>		
<b>MAJOR ACTIONS</b>	<b>TIMELINE</b>	<b>MEASURES OF SUCCESS</b>
1. Define standards for exceptional service at JFSC (client surveys; feedback; results of accreditation process).	<b>Q1/Q2 2015</b>	<ul style="list-style-type: none"> <li>Standards for exceptional service and a reporting schedule of performance relative to those standards are defined and communicated to staff, Board and volunteers.</li> </ul>
2. Define purpose and scope of recognition: <ul style="list-style-type: none"> <li>goals of recognition</li> <li>what kinds of recognition?</li> <li>recognition by whom?</li> </ul>	<b>Q3 2015</b>	<ul style="list-style-type: none"> <li>A recognition framework is developed which defines the purpose, goals, scope and desired sources of recognition.</li> </ul>
3. Develop strategy to gain recognition and operationalize it.	<b>Q4 2015</b>	<ul style="list-style-type: none"> <li>A variety of techniques for gaining recognition are developed and implemented.</li> </ul>
4. Develop communications strategy around recognition results and operationalize it.	<b>Q1 2016</b>	<ul style="list-style-type: none"> <li>A communications strategy is developed and implemented in collaboration with the marketing/communication committee</li> </ul>
5. Develop process for monitoring and evaluating recognition results.	<b>Q1/Q2 2016 And Ongoing</b>	<ul style="list-style-type: none"> <li>Monitoring and evaluation processes are developed to assess types of recognition achieved.</li> <li>Results of assessment are used to refine promotion of recognition results.</li> </ul>

**ACTION PLAN FOR 2015 - 2018 STRATEGIC GOALS *cont'd***

<b>STRATEGIC GOAL: Expand JFSC relationships and partnerships</b>		
<b>LEAD(S): Executive Director</b>		
<b>MAJOR ACTIONS</b>	<b>TIMELINE</b>	<b>MEASURES OF SUCCESS</b>
1. Identify current relationships and partnerships, and develop criteria for assessing their effectiveness.	<b>Q2 2015</b>	<ul style="list-style-type: none"> <li>Report on effectiveness of current relationships and partnerships completed.</li> <li>Ongoing measurement of effectiveness annually to be reviewed by staff and board</li> </ul>
2. Define the goals for expanding current relationships	<b>Q3 2015 And ongoing</b>	<ul style="list-style-type: none"> <li>Identified strategic goals for expanding current relationships and partnerships</li> </ul>
3. Assess current gaps to enhance or increase current partnerships and relationships, and identify potential new relationships and partnerships.	<b>Q4 2015</b>	<ul style="list-style-type: none"> <li>Completed analysis of current gaps in desired relationships and partnerships.</li> <li>Potential new relationships and partnerships are identified, with a shortlist of priority relationships and partnerships developed.</li> </ul>
4. Develop processes for contacting shortlist of new relationships and partnerships and enhancing current partnerships and relationships.	<b>Q1 2016 And ongoing</b>	<ul style="list-style-type: none"> <li>Contact management processes are developed and shared with Board and staff.</li> </ul>
5. Initiate contacts with potential new relationships and partnerships.	<b>Q1 2016</b>	<ul style="list-style-type: none"> <li>Contacts with key individuals in new relationships and partnerships are initiated by staff and Board.</li> <li>Feedback on contacts is shared with Board and staff, and used to refine contact management processes.</li> </ul>

**ACTION PLAN FOR 2015 - 2018 STRATEGIC GOALS *cont'd***

<b>STRATEGIC GOAL:      Develop a Reserve Fund</b>		
<b>LEAD(S):      Board + Chair, Reserve Fund Committee</b>		
<b>MAJOR ACTIONS</b>	<b>TIMELINE</b>	<b>MEASURES OF SUCCESS</b>
1. Develop overarching strategy for Reserve Fund (purpose; objectives; Terms of Reference for Reserve Fund Committee etc.).	<b>Q4 2014</b> <b>Board Meeting</b> <b>Mar. 2015</b>	<ul style="list-style-type: none"> <li>Reserve Fund Committee is established.</li> <li>Strategy for Reserve Fund is approved by Board.</li> </ul>
2. Develop Reserve Fund Plan, including targets, timelines and sources of revenues.	<b>Q1/Q2 2015</b>	<ul style="list-style-type: none"> <li>Reserve Fund Plan is approved by Board.</li> </ul>
3. Implement reserve fund strategy	<b>Q3 2015</b>	<ul style="list-style-type: none"> <li>Reserve fund strategy implemented</li> <li>Reserve Fund Plan, including purpose, objectives and targets, is communicated to stakeholders with plan to manage stakeholder perception.</li> </ul>
4. Monitor the progress of the Reserve Fund Plan and evaluate the reserve fund annually.	<b>Q4 2015</b>	<ul style="list-style-type: none"> <li>Reserve Fund Plan is monitored quarterly by the Board and evaluated annually.</li> <li>Results of monitoring and evaluation are used to refine communication strategies.</li> </ul>



**IMPLEMENTATION CALENDAR**

**Q1 = Fiscal Quarter 1 = Jun 1<sup>st</sup> – Aug 31<sup>st</sup>**

**Q2 = Fiscal Quarter 2 = Sep 1<sup>st</sup> – Nov 30<sup>th</sup>**

**Q3 = Fiscal Quarter 3 = Dec 1<sup>st</sup> – Feb 28<sup>th</sup> (29<sup>th</sup>)**

**Q4 = Fiscal Quarter 4 = Mar 1<sup>st</sup> – May 31<sup>st</sup>**

2015/2016				
STRATEGIC GOALS	Q1	Q2	Q3	Q4
<b>Preventive Services</b>	Develop framework for preventive services	Identify the enhancement of existing services and the initiation of new services.	Conduct research on preventive services	
<b>Recognition for Exceptional Service</b>		Define standards for exceptional service	Define purpose and scope of recognition	Develop and implement strategy for gaining recognition
<b>Expand Relationships and Partnerships</b>		Identify effectiveness of current relationships and partnerships	Define the goals for expanding current relationships	Assess current gaps to enhance or increase current partnerships and relationships, and identify potential new relationships and partnerships
<b>Create Reserve Fund</b>	Establish Reserve Fund Committee <b>March Board meeting:</b> Present strategy for Reserve Fund	Present Reserve Fund Plan to Board	Implement reserve fund strategy	Monitor the progress of the Reserve Fund Plan and evaluate the reserve fund annually

**IMPLEMENTATION CALENDAR *cont'd***

2016/2017				
STRATEGIC GOALS	Q1	Q2	Q3	Q4
<b>Preventive Services</b>	Evaluate Preventive services	Implement the plan		
<b>Recognition for Exceptional Service</b>	Develop communication strategy for recognition results	Develop process for monitoring and evaluating recognition results		
<b>Expand Relationships and Partnerships</b>	Develop processes for contacting shortlist of new relationships and partnerships and enhancing current partnerships and relationships	Initiate contacts with potential new relationships and partnerships.		
<b>Create Reserve Fund</b>				Monitor the progress of the Reserve Fund Plan and evaluate the reserve fund annually
2017/2018				
STRATEGIC GOALS	Q1	Q2	Q3	Q4
<b>Preventive Services</b>				
<b>Recognition for Exceptional Service</b>				

<b>Expand Relationships and Partnerships</b>				
<b>Create Reserve Fund</b>				Monitor the progress of the Reserve Fund Plan and evaluate the reserve fund annually