

GUIDING OUR MISSION THROUGH CHANGE One Agency's Story

GARY MILLER

Executive Director, Jewish Family & Career Services, Atlanta, Georgia

Paralleling the experience of many family service organizations in the 1990s, Jewish Family & Career Services of Atlanta has undergone tremendous change in response to a reevaluation of its relationships with both traditional funding partners and the marketplace. This article examines six key strategies employed by the agency to transform itself into a more responsive organization, poised to compete and thrive in a very different environment. While every community has its unique characteristics, the experience and example of JF&CS Atlanta should encourage other organizations to cross pathways not yet challenged.

Since 1991, the Jewish Family & Career Services (JF&CS) of Atlanta has grown from a \$1.2 million sectarian agency with 9 programs in one location to a \$5 million, 31-program, multipurpose organization operating in three main centers, as well as many satellites and host institutions serving the entire community. JF&CS served 9,000 people in 1991 compared with 30,000 in 1996. In 1991, its core competency was counseling. Today its strategic business opportunities lie in counseling, career services, services to the developmentally disabled, elder care, volunteer and leadership development, training and education, and a catch-all category called specialty services.

Funding streams have also shifted dramatically during this period (see Table 1).

Demographics determine the way in which organizations respond to their environments. A recently completed marketing study by the Atlanta Jewish Federation confirms a minimum of 77,000 core Jews, almost double its population from a mere 20 years ago. However, assimilation in the Southeast remains extremely high, and affiliation rates are only about 25 percent. People are geographically dispersed over a 30-mile radius, tending to move to the northern suburbs and exurbs outside the beltway so that there is no longer any one core Jewish area.

Recently, the JF&CS moved into a new, expressly built facility on the northern arc, tripling its space and conveying a modern, businesslike atmosphere. It maintains four

satellites in strategic locations and employs staff who deliver programming in over 35 other host institutions.

CHANGING PERCEPTIONS OF MISSION FROM WITHOUT AND WITHIN

The transformation of the Atlanta JF&CS from a "Mom and Pop shop" in 1991 to its current strong place within the market begins and continues with mission, image, and perception. The mission, to strengthen the Jewish family in all its contemporary lifestyles, is augmented by the recognition of the role that the Jewish community plays in the greater community. The role that Jews played in the civil rights movement is still cherished and appreciated in Atlanta. The role model that the Jewish community exhibits for others struggling to achieve the same autonomy targets us for consultation, collaboration, and partnership.

We are, unfortunately, appreciated from without, but perceived extremely narrowly from within! While the non-sectarian community exhorts us to do and share more, the mainstream Jewish community continues to view us as a social welfare agency. This social welfare image has traditionally reinforced a bias on the part of mainstream Jews to seek private practitioners, mainly psychologists and psychiatrists, for themselves and their children. Yet, because of the great segmentation within the aging services marketplace and an entitlement label associated with aging, most

Table 1. Changes in Funding Streams for the Atlanta Jewish Family and Career Services

Source	1991-92 (%)	1996-97 (%)	Net Change (%)
United Way	50	17	-33
Atlanta Jewish Federation	25	20	-5
Fees	10	15	+5
Fund raising	10	18	+8
Government grants	5	30	+25

nonetheless call JF&CS in a crisis with their aging parent. Lacking a critical mass of needy Jews, however, the JF&CS of yesteryear could not support programming valued beyond \$1,000,000.

Traditionally funded to serve "needy" people, we now view our mission as serving *all* people in need. Our vision to systematically change the perception of the JF&CS from serving needy Jews to *servicing Jews in need* has begun to take hold as we are increasingly seen as professional, affordable, accountable, accessible, conveniently located, comprehensive, one-stop, and user-friendly. We have worked hard to de-stigmatize our image and to be viewed as the Jewish community's neighborly Resource Center.

As we approach the twenty-first century, the opportunities to serve Jews in need abound in the marketplace as mainstream programming explodes in response to a growing awareness of those needs. In just three years, hundreds of thousands of dollars in new core programs have emerged from both Jewish and nonsectarian coffers because Jews, like all other people, are developmentally disabled, are HIV-positive, are substance abusers, are perpetrators and victims of domestic violence, need respite and transportation, and also have special needs children who require interventions appropriate with their presenting profiles.

To traditional funders entering their annual campaign periods, our mission remains the key attraction to donors. Sharing stories of the human courage to change creates a competitive marketing advantage that should be advanced to the maximum. In the final analysis, the broad-based missions of family service organizations can become lightning rods for

government, corporate, foundation, and traditional sources of funding because of their diverse yet distinctive appeal for promised outcomes.

Being able to successfully reengineer internally while reinforcing core values is a complex and sensitive challenge for family service organizations. Yet it is a given that the leadership at JF&CS must dramatically embrace the transformation of the traditional nonprofit culture in order to survive and prosper beyond 2000. The importance to the organization of being market driven and market responsive cannot be emphasized enough.

From the very process of decision making to the strategies themselves, a top-down and across-the-board embracing of "no longer business as usual" symbolizes this call to change. Every key decision on each business plan of action requires a different set of rules for the new workforce we hire, the technology we introduce, the products we develop, the motivators and incentives we create, the marketing we produce, the customer service focus we promote, and the information we control. In symbolic fashion it is as if we are charged with simultaneous mastery of the Internet and Intranet applications for our future. It is hoped that for many of us the "art" will remain in the magic of managing change from both within and without in harmony and synergy and the "science" will become the prospering of our organizations in a diverse environment without diminishing our mission and role in the community.

VOLUNTEER, YOUTH, AND LEADERSHIP DEVELOPMENT

Those of us who manage well-developed volunteer programs have gold in our own back-

yards and may not realize it. Last year JF&CS volunteers donated over 33,000 hours of time—equivalent to 17 full-time staff members. The in-kind value is difficult to measure (call it invaluable), but needs to be viewed as a competitive advantage. A variety of different programs catering to volunteers and Board development should be considered in order to nurture this most important asset: recognition events, orientations, training and education programs, hands-on service and committee work, mentoring programs, well-articulated volunteer position descriptions, and focus and advisory groups. For JF&CS, an exciting byproduct has been the over 400 percent increase in giving by our Board since 1991.

Tzedekah and *tikkun olam* are alive and well in Atlanta—thanks to our own commitments and the influence of the Carter Center, the Atlanta Project, Hands-on-Atlanta, a proactive Atlanta Jewish Federation and United Way, and of course, Georgia's location in the Bible Belt. The true attraction and deal-maker for collaboration with other networks of service, both public and private, is the non-threatening entry point of sharing our expertise in volunteerism. We consult, manage other agencies' volunteer programs, place volunteers in host establishments, and are attractive to medical HMOs because of this asset. It is a platform-builder for future business.

Volunteer leadership and Board development are essential to our future. In 1991, the mean age of our Board members was over 55, and a majority languished for a long time around a small but committed core. Today, the mean age is under 45. The combination of youthful exuberance and wisdom and experience is refreshing, revitalizing, and rejuvenating. Volunteer leaders need T.L.C. and meaningful work, and my commitment to them is to ensure that they receive both. One and a half hours of leadership development is devoted to the Board each month, and I challenge them to struggle with governance issues at these meetings. An agency must treat its Board as its number #1 customer!

At the other end of the spectrum are the 21- to 40-year-olds struggling for meaningful experiences and relationships, careers, and ambitions. They are our future leaders. We have launched a leadership series for this age group, utilizing our professionals in small seminars and intimate surroundings to facilitate learning and growth as they move through their transitions. The multiple goals of this series are socialization, skill enhancement, networking, finding a comfortable place for themselves, and experiencing the expertise of our professional staff. The objective is to allow them to administer this sub-organization and to lead others into Jewish communal life. Since January 1996, 800 new contacts have been made, four programs have drawn over 600 people, over 150 new volunteers have devoted time and money, and three new young leaders will join our Board this year. Investing in youth to perpetuate our future is an absolute prerequisite to success!

INFRASTRUCTURE

The greatest challenge we have as administrators in developing our human services delivery system for the year 2000 is having the infrastructure to support it and a dynamic philosophy for managing people to thrive within it. In today's fast-paced world, consensus-building is not always possible or desirable. But if you communicate the philosophy and vision consistently and repeatedly until everyone is speaking it, there will be less reactive behavior and faster-paced change can occur. My experience with a 115-member Board and over 35 standing committees is that they work because we have committed and educated thousands of people to our good work and our mission. But you have to trust and risk, delegate with authority, manage key players, and troubleshoot. It is only one way of organizing, not recommended for everyone, but its positive results certainly override some of its more challenging aspects.

In order to manage and administer the pace of change, the thirst for data, and the need to communicate and analyze to adapt to marketplace phenomena, the successful human ser-

vices delivery system will need centralized support to provide the backbone for our clinical delivery systems. The JFS of the year 2000 will likely require a marketing division, a public relations/communications division, a management information systems director, an Internet resource manager, a network and systems analyst, a fund development director, an endowment and planned giving program, a grantsmanship program, a human resource department, training and development programs, a chief financial officer, a medical director, medical social workers, and other allied health professionals to interface with the medical model. Eventually, a decentralization of services is likely to occur, and the challenge of managing multiple locations will arise. In 1991, none of these positions existed at JF&CS Atlanta. In 1996, 75 percent were in place, and the decentralization of resources and decision making has become a major issue.

UNDERSTANDING YOUR CUSTOMERS AND INVESTING IN STRATEGIES TO KEEP THEIR ATTENTION

Market studies, focus groups, and demographic data available from local Chambers of Commerce and state planning divisions are resources for addressing the issue of customer attraction and retention. Knowing your customers, investing each Board member and professional staff in making ongoing connections and contacts, and inscribing outreach and marketing into everyone's job description are the most essential yet least expensive ways of ensuring success. Agencies should consider workgroups for marketing and communications development as a means of ensuring a coordinated effort. The following is a comprehensive but not exhaustive list of customers to be considered in an environmental scan of a Jewish Family Service agency:

- traditional funders: United Way and Federation
- government: federal, state, local, county, and city
- managed care and insurance companies

- individual clients
- groupings of clients with similar needs
- physicians, hospitals, and group practices
- public and private schools
- corporations: employee assistance programs, Lunch & Learns, human resource managers
- third-party brokers
- the Board
- volunteers in your agency
- the staff
- personal networks
- foundations and corporate giving units
- the Jewish and non-Jewish communal networks
- rabbis

Once contact has been made with these customers, invest in strategies to attract and maintain their attention, thereby maintaining your base of influence:

- seminars and free consultations
- brochures, mailings, and advertisements
- free lunches for physicians (and keepsakes of your visit)
- in-reach to Board, volunteers, and staff
- training for staff, Board, and volunteers
- joining networking groups: AJFCA, Family Service America, National Society of Fund Raising Executives, Society of Human Resource Management
- taking people to lunch
- responding to Requests for Proposals
- marketing to colleagues—showing them what you have to offer
- maintaining liaisons with funders at least monthly
- maintaining liaisons with key customers weekly, if possible
- always appearing convenient, relevant, and fresh in the mind of the customer.

THE NEW JEWISH FAMILY SERVICE AGENCY: INNOVATIONS WITH GOVERNMENT

Government is shifting dollars and the burden of social welfare to the local level. The mean-spiritedness of Washington makes it too easy

for us to say, "Ain't it awful." With over \$1,000,000 at risk this year, certainly JF&CS of Atlanta is apprehensive about its future funding. Yet, the crisis in Washington brings with it opportunity.

The first opportunity lies in the education and awareness of leadership. Nothing brings greater fear to our hearts than the threat of shutting down our own institution. At JF&CS, Board advocacy has become the top priority, and last year alone twelve Board members lobbied the legislature. The second opportunity lies in the mobilization of volunteers and the heightened sensitivity to giving resources to the agency. The third opportunity lies in the marketplace. With the closings of programs and the prevailing atmosphere of mergermania, partnership and affiliation become of paramount importance.

Managed care has thus far succeeded only within the medical field. However, managed care of community services is being piloted now in Medicare/Medicaid demonstration projects, and once again we are best positioned to take advantage of the bouquet of services already in place to be attractive to traditional HMOs. The pressure on state government to ensure the existence of safety nets, such as provided by Jewish Family Service agencies, is enormous. Legislators fear that the current model of managed care will discard clients once their benefits are exhausted; they fear that clients will be discharged and left without a support network. The soft services that we provide—the care management, assessment, evaluation, transportation, meals on wheels, friendly visitors, homemaker services, legal and financial management, all in-home support services that help keep people out of institutions—are cost effective and attractive to HMOs. Let there be no mistake about this. Managed care is here to stay and is wholly endorsed by state government. The key to the future for Jewish Family Service agencies is *where* they end up on the food chain.

As passive service providers waiting for the phone to ring and to be chosen, we do not stand out from the other hundreds of providers in the network. We are dictated to, and

somebody else controls our destiny. What our leadership has to do is move up on the food chain and become not only a service provider but a broker of services within the HMO establishment. Because of our networks and because of our tradition of collaboration and sharing with other systems, we are in a position to present ourselves as central entry points and integrated networks of non-medical services to the HMO community. Negotiating affiliate agreements with government, long-term care networks, managed care companies, physicians groups, hospitals, and other nonprofits is an important investment activity, offering a whole new world of opportunity. Welfare-to-work initiatives, recent immigration reform legislation, and school-to-work incentives have all stimulated the infusion of significant dollars into this line of business. Organizations that can take advantage of their connectivity to the Internet and create platforms for business through Web sites and links to other business partners will experience increased consumer activity and revenues. Recent initiatives by the JF&CS of Atlanta include the development of a Computer Training Institute, Professional Development and Training Institute, and a comprehensive one-stop shopping Career Resource Center and a Web site (www.JFCS-Atlanta.org). Partners in these ventures include other nonprofits, nonprofit associations, planning divisions at the state and federal levels, and other public entities. The future is limited only by our capacity to dream.

RESOURCE DEVELOPMENT INITIATIVES AND SOCIAL ENTREPRENEURSHIP

As nonprofits struggle to remain competitive and expend endless energy on developing new revenue streams, numerous strategies can be adopted to infuse operating capital into our organizations. Over the past five years, the JF&CS of Atlanta has adopted the following tactics to increase income: merger and acquisitions, legacy programs, entrepreneurial ventures, and new marketing and business initiatives (Table 2).

Table 2. Resource Development Initiatives of the Atlanta JF&CS

<u>STRATEGY</u>	<u>EVENT</u>	<u>RESULT</u>	<u>OUTCOME</u>
MERGER	Merger with JVS: 1/1/97	9 new programs	\$1,500,000 business acquisition
PURCHASE	Purchased independent living program	12 new clients and 3 new programs of coordinated service delivery	Start-up grant of \$25,000 Annual budget of developmental disabilities program is \$500,000 today.
NEW BUSINESS START-UP	Trademarked Jewish AIDS Pin	National symbol for programming	1 year profit \$60,000
NEW BUSINESS START-UP	"Centerpieces for Tzedakah" and auto safety kits	25 new volunteers Money for kosher food pantry	15 month \$38,000 net income
FUND RAISING	Membership campaign 1991-1996	100% increase	\$180,000
FUND RAISING & MARKETING	Tribute funds	Marketing strategic business units to champions of program	1996 — \$136,000
NEW BUSINESS	Revitalizing adoption services	Changed name to Cradle of Love	1992 through 1996 — broke even
NEW LEGACY STRATEGY	Endowment: Cradle of Love	To maintain program	1994-96 — \$100,000
NEW BUSINESS START-UP	Disposal of assets program	Donated cars, etc.	1996 — \$20,000
NEW BUSINESS START-UP	Respite services, business, spin-off	Self-funded through contracts	1996 — \$85,000
NEW INVESTMENT	Grantsmanship	New funding for programs Helped create two new programs	New funds — \$500,000 Transportation — \$140,000 HUD — \$360,000
NEW MARKETING INITIATIVE	Planned giving & endowment	New program launched	1997
FUND RAISING	Fund-raising events	Adult-child mentoring program (PAL), homeless services	\$40,000
NEW BUSINESS INITIATIVE	Corporate sponsorship	Seminars, programs, lunches, etc.	\$25,000
COMMUNITY INVESTMENT STRATEGY	Capital campaign	Community initiative including JF&CS expansion	\$1,500,000

The business of business is creating more business, and we have learned some truths about ourselves from our ventures into the marketplace. Flexibility, adaptability, responsiveness to change, and analyzing consumer habits are all qualities important to success. Rather than asking ourselves, What is our business, who are our customers, or what is

value?, ask instead, What is our true genius and what are our core competencies? If you know what you're great at, where the gaps are in the marketplace, and what the customer considers valuable, you have the beginning of entrepreneurial fever.

THE JEWISH FAMILY SERVICE AGENCY OF THE FUTURE

The Jewish Family Service agency of the future will have multiple sites with a home base for administrative purposes only. Every synagogue, day care center, preschool, personal care home, nursing home, Jewish day school, and Jewish Community Center will be our domain and may have JFS professionals on site providing tailor-made programming for parents, children, and elders alike. We have too often given away these services for free. The value-added services that we provide to member establishments are now recognized as an essential component of the lifestyle choices that these institutions market to their members. These services should be self-supporting and even more lucrative as they feed referrals into our systems.

Because the Jewish Family Service agency

of the future is going to have to make up for deficits in traditional funding, it will have to confront another truth: THERE CAN BE NO MISSION WITHOUT MARGIN. And what's more, this margin must come from our own making.

It is for this reason that the JF&CS of Atlanta has, for the past three years, embarked on developing entrepreneurial readiness to confront the mission-money matrix model for all of our programs. The results have been pleasant surprises. Two programs—Adoption and Respite—have been spun off into “for-profit” business models, and two more may join them soon. This process has provided the impetus for grantsmanship, endowment, and focused marketing that have enhanced revenues, profile, and market niches.

While the AIDS pins and auto safety kits that we have trademarked and sold have been profitable, they are nevertheless products with a limited shelf-life. What each of us has in our own backyard is a cohesive array and mastery of skilled services that consumers will pay for. Doing the research and embarking on the entrepreneurial process will lead each agency to discover its unique answer and pathway.

BUILDING OUR COMPUTER BRIDGE TO THE 21ST CENTURY Lessons Learned for the Jewish Family Service World

ANITA FRIEDMAN, D.S.W.

Executive Director

with

DAVID HYMAN

Computer Information Systems Coordinator

Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties, San Francisco, California

In addition to serving the needs of central administrative and support staff, computer technology, through the use of an intranet, can support caseworkers both directly and indirectly. There is growing interest in Web sites for Jewish Family Services, and every agency should be preparing to go online.

In the beginning, computer technology in the Jewish Family Service (JFS) environment was viewed as either an imperative or a curse, and eventually as a mixed blessing that the leadership and staff would ultimately have to face. By now, almost two decades later, an informal survey of agencies across the country makes it clear that virtually all JFS executives agree on the need to fully integrate technology into the way we do business. The differences among agencies lie in their abilities to harness the human talent and capital resources required to automate, network, and place a computer on everyone's desk.

Where all this use of computers is leading no one really knows. Thomas Edison thought that the primary application of the phonograph would be dictation. The foremost scientists in the country believed that the telephone would eliminate Southern accents in American speech due to “homogenization” of the population.

What we *do* know after two decades of experience is that the multigenerational process of cultural transformation from a manual to a computerized way of working continues. As a network of family-serving agencies, we have to varying degrees embraced computerization in two major dimensions of our work: administration and client services. Both applications are addressed in this article, with an

emphasis on what has been learned and on implications for future directions.

Computerization in this field was first and is still primarily used for administration. Technology, when used well, allows a relatively small, centralized staff to keep on top of enormous amounts of useful data from many sources. At Jewish Family and Children's Services (JFCS) in San Francisco, we have had a history of employing “near-cutting-edge” technology to support programs of service, largely to the credit of a few “techies” on staff who were passionate about the new computer revolution and who brought the rest of the staff along for the initial ride.

At various points in its history, JFCS has implemented computerization to streamline production of documents, improve budgeting and handle accounting, maintain mailing lists and contact lists, simplify payroll, expedite client billing, gather and use demographic and service data about clients and staff, and facilitate the agency's development and fund-raising efforts.

Until recently, our use of computer technology was limited by several factors, including the high cost and technological difficulty of connecting computer systems at the agency's various branch locations and of providing direct computer access to dozens of clinical and casework staff at their desks. As a result,