



**Jewish Children's Regional Service**

# **Strategic Plan**

## **2009-2011**

**March 2009**

**Facilitated by: Berman Group  
Metairie, LA**

## TABLE OF CONTENTS

1.	Introductory Letter	2
2.	Vision and Mission Statements	3
3.	Organization & Governance Action Plan	4
4.	Program Action Plan	9
5.	Development/Finance/Marketing Action Plan	14
6.	Setting Priorities	19
7.	Implementing the Strategic Plan	22
Appendices		
A.	SWOT Analysis	23
B.	Strategic Planning Committee – Roster	29
C.	Task Forces – Rosters	30
D.	Committees with Strategic Plan Responsibilities	31
E.	Strategic Plan Cost Estimates	32
F.	Implementation Management Chart	34



# Jewish Children's Regional Service

(formerly...The Jewish Children's Home)

Established...1855

supported in part by our own endowment...The Southern Jewish Children's Fund

TO: JCRS Members and Friends

In July 2009, our Executive Committee began a strategic planning process that we intended would recreate the JCRS vision and mission, and set forth a blueprint that would allow JCRS to build on its 150 years of service and, to the extent necessary, change directions as we move forward in this 21<sup>st</sup> century. In particular, we felt it essential that JCRS' regional nature, dedicated to providing services throughout the seven-state region, be enhanced and better organized.

To accomplish this, it was essential that JCRS revisit its traditional organization and governance models, review the services and programs we offer to the Jewish youth of our region, and insure the financial future of our beloved agency.

To undertake this work, I requested 25 of our most active and experienced Board members to serve on a Strategic Planning Committee that would assume responsibility for managing this far-reaching, comprehensive planning project. We also retained the services of an experienced strategic planning firm, Berman Group, to facilitate our work.

The first meeting of the committee was held on October 23, 2008,. During the ensuing five months, the Committee and its sub-committees and task forces, more than 40 persons in all, met on many occasions to create this realistic and credible Plan. On March 22, 2009, the JCRS Board adopted the Plan and directed that implementation of its 28 objectives begin immediately.

We want to thank the Board members, our professional and clerical staffs and our facilitators for their dedication to this project and to the future of JCRS. However, it is not enough that the Plan is completed. The only real justification for all this work is that the changes mandated by the Plan be implemented in a timely and effective manner so that JCRS will be revitalized and renewed for the challenging future that lies ahead. This we will do.

Sincerely,

*Lisa Heller*

Lisa Heller  
President

*Bruce Miller*

Bruce Miller  
Chair, Strategic Planning Committee

Ned Goldberg  
LCSW, ACSW  
Executive Director

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## **VISION AND MISSION STATEMENTS**

The Strategic Planning Committee adopted the following Vision and Mission Statements on January 6, 2009.

### **Vision Statement**

The vision of JCRS is to be a source of superior levels of needs-based support, resources and services for Jewish youths that will promote their welfare, education and Jewish identity, thereby helping to prepare them to be well-adjusted, self-supporting, young adults.

### **Mission Statement**

The mission of JCRS is to provide needs-based resources that assist in (1) funding Jewish summer camp experiences; (2) funding post-secondary education for Jewish students; (3) underwriting expenses that support Jewish youth with special psychological, physical and social needs; and (4) providing economic support and consultation to Jewish youth and their families in exceptional situations.

## ORGANIZATION AND GOVERNANCE

### ACTION PLAN

#### Goals

- 1.0 *Governance.* Develop a governance structure for Board, standing committees, Executive Director and staff, including a board of directors of a size and composition capable of meeting its responsibilities, a regional structure that reflects the multi-state nature of the organization, and mutually agreed upon position descriptions for all.

#### Objectives

- 1.1 Executive Committee (EXCOM) to appoint a Governance Committee to draft amendments to JCRS organizational documents that (1) optimize Board size, structure, functionality, arrangements for leadership succession and officers' duties, and (2) meet the needs of JCRS constituents throughout the Region, to be submitted to the Board of Directors by March 2010.

#### Tasks

- 1.1.1 EXCOM to appoint a Governance Committee (GC) to be composed of seven Board members, two of whom shall be non-New Orleans residents and two of whom shall be attorneys, by April 2009.
- 1.1.2 GC to research organizational structures and basic documents of other non-profit organizations, comparable to JCRS and otherwise, and consult with board members and others, by August 2009.
- 1.1.3 GC to prepare draft recommendations in the form of revised JCRS organizational documents, including articles of incorporation and by-laws, and solicit feedback from a broad cross section of board members by November 2009.
- 1.1.4 GC to finalize organizational document for submission to the Board by March 2010.
- 1.2 EXCOM to make recommendations to the Board of Directors for establishment of regional working committees within each state that provide meaningful representation of regional constituents and expand JCRS marketing, fund raising and outreach capabilities throughout the Region by April 2011.

- 1.2.1 EXCOM to identify a limited number of appropriate communities and states within JCRS region for possible inclusion in a pilot Regional Working Committee (RWC) program by June 2009.
  - 1.2.1.1 EXCOM to select at least one community in Texas and one community in another state within the JCRS region to create pilot programs to test the concept and viability of a region-wide RWC program, and appoint RWC Chairs/Co Chairs for those pilot programs by June 2009.
- 1.2.2 RWC Committee Chairs to report to EXCOM on the results of the pilot programs, together with recommendations for expansion or termination of the RWC program, by July 2010.
- 1.2.3 EXCOM to assess and evaluate the RWC reports, determine whether to continue the pilot RWC programs so as to make them permanent and extend the program to other selected communities and states within the JCRS region, and make appropriate recommendations to the Board by September 2010.
  - 1.2.3.1 Should the program be continued and/or extended to other communities, EXCOM to select RWC Chairs/Co-Chairs and submit names to the Board by September 2010.
- 1.3 President to appoint a new committee of Board members to draft position descriptions for the President, officers listed in the by-laws, Directors and Executive Director, to be submitted to the Board for adoption by March 2010.
  - 1.3.1 Committee to review existing position descriptions, to the extent available, of the President, Directors and Executive Director by April 2009.
  - 1.3.2 Committee to review similar position descriptions of other organizations and secure input from other board members, the Executive Director and staff, by August 2009.
  - 1.3.3 Committee to draft new position descriptions, taking into consideration to the extent possible, those used by other similar organizations, by November 2009.

1.3.4 Committee to review proposed position descriptions with all persons listed above, and present final versions to the Board for adoption by March 2010.

2.0 *Office Management.* Implement an office management system that utilizes state-of-the-art information technology, planning, financial and operational techniques to maximize efficiency and productivity and delivery of accurate data with respect to the agency's current and potential clients, donors and the members of JCRS.

### **Objectives**

2.1 President to appoint an Office Management Committee (OMC), co-chaired by the First Vice President and Executive Director, to create, in cooperation with staff, an inventory of essential organizational functions required to accomplish JCRS Mission, by June 2009.

2.1.1 Director of Programs (DOP) to collect information from each employee on currently performed duties by April 2009.

2.1.2 DOP to group tasks by functional categories by May 2009.

2.1.3 OMC to review, analyze and make recommendations to EXCOM and Executive Director regarding reorganization of functions and implement by June 2009.

2.2 President to appoint an Information Technology Committee (ITC), chaired by the Third Vice President, and including Executive Director, Director of Programs and knowledgeable board members and staff, to manage the purchase, installation and staff training for an IT system to address JCRS administrative functions, by October 2009.

2.2.1 ITC to review work of the existing volunteer technology committee by April 2009.

2.2.2 ITC Chair to appoint one committee member to review JCRS existing software and hardware and identify upgrades and additions needed to meet future demands, and report to ITC by April 2009.

2.2.3 ITC to review information on available systems and software and make recommendations to EXCOM regarding purchase and installation of hardware and software by June 2009.

- 2.2.4 Executive Director to purchase and arrange for installation of the new system by July 2009.
- 2.2.5 Executive Director, with assistance of ITC, to complete staff and selected Board member training by September 2009.
- 2.3 Director of Programs (DOP) to revise JCRS website to include interactive capabilities and improved communications by December 2009.
  - 2.3.1 DOP, in consultation with Executive Director and consultants, to choose web site designer and hosting service by May 2009.
  - 2.3.2 DOP, in cooperation with Executive Director and staff, to update site content through review of current content and layout, including such features as information from 2009 annual meeting, by July 2009.
  - 2.3.3 DOP, in cooperation with Marketing Committee, to coordinate incorporation of new interactive features by October 2009 and ongoing.
- 3.0 *Communications.* Improve and maintain effective communication among Board members, committees, staff, donor, constituents and the Jewish community at large.
  - 3.1 President to appoint a Media Committee (MC), including representatives outside Greater New Orleans, to identify and implement video, audio and textual technologies that allow JCRS constituents to communicate effectively and easily with JCRS and among each other without regard to location, by December 2009.
    - 3.1.1 MC to determine available technology for improved communication among Board, staff and constituents, including online teleconferencing, by May 2009.
    - 3.1.2 MC to select and recommend appropriate technologies, such as including online conferencing, to EXCOM by July 2009.
    - 3.1.3 EXCOM, in cooperation with MC, to adopt a phase-in plan for the use of new technologies by September 2009.

- 3.1.4 EXCOM, in cooperation with MC, to publicize and encourage use of new technologies among Board, staff and constituents by December 2009.
- 3.2 OMC to evaluate existing intra-office communications processes and recommend improvements to the Board by October 2009
  - 3.2.1 President to request a Board member, in cooperation with staff, to identify existing intra-office communications methods and techniques by May 2009.
  - 3.2.2 Board member identified in 3.2.1. to report to OMC regarding effectiveness of current JCRS intra-office communications and use of available technologies by June 2009.
  - 3.2.3 Executive Director, in cooperation with OMC, to install new procedures and processes to improve intra-office communications by September 2009.
  - 3.2.4 Executive Director, in cooperation with OMC, to train staff about new procedures and processes by October 2009.
- 3.3 OMC to develop a Board Orientation Program for all current and new Board members by April 2010.
  - 3.3.1 Executive Director to review content and effectiveness of all previous board orientation and training programs and report to OMC by June 2009.
  - 3.3.2 Second Vice President and Executive Director to deliver recommendations concerning scope and content of new Board orientation program to OMC for approval by November 2009.
  - 3.3.3 Director of Programs to prepare agenda and assemble orientation materials for first Board orientation program by February 2010.
  - 3.3.4 OMC to deliver first Board orientation program to all Board members elected at March 2010 annual meeting, by April 2010.

**PROGRAM**  
**ACTION PLAN**

**Goals**

- 1.0 *Camp Experience Grant Program.* Enable Jewish children with financial needs to enhance their Jewish identity through meaningful social, developmental and cultural experiences with their peers in a Jewish camp environment.

**Objectives**

- 1.1 Camp Coordinator to develop an expanded recruitment program that identifies additional Jewish children to qualify for Camp Experience Grants, by January 2010.

**Tasks**

- 1.1.1 Camp Committee, in cooperation with Camp Coordinator, to analyze difficulties and challenges experienced in publicizing JCRS camp program to potential clients and others, by April 2009.
- 1.1.2 Camp Committee and Camp Coordinator to identify initiatives that will improve camp recruitment and publicity activities, by September 2009.
- 1.1.3 Camp Coordinator to implement new strategies by December 2009.
- 1.2 Director of Programs, in cooperation with Camp Coordinator and Chair of the Camp Committee, to develop a process that more actively engages the entire Camp Committee in managing the Camp Experience Grant Program, by December 2009.
- 1.2.1 Camp Coordinator, in cooperation with Director of Programs, to explore means to more effectively engage Committee members, and define appropriate roles for Board members that result in meaningful participation in the process of publicizing the Program and processing applications by September 2009.

- 1.2.2 Camp Coordinator, in cooperation with Director of Programs, to develop recommendations concerning responsibilities and duties of Camp Committee members, by October 2009.
  - 1.2.3 Camp Coordinator, in cooperation with Director of Programs, to recommend to Camp Committee appropriate changes to operating procedures, by November 2009.
  - 1.2.4 If necessary, Camp Coordinator to recommend changes in operation of the Camp Committee to the JCRS Board for approval by December 2009.
- 2.0 *Education Scholarship Program.* Assist Jewish students to become self-supporting adults by providing funds for post secondary education and training based on their abilities and financial needs.
- 2.1 Director of Programs to design and implement a formal follow-up contact procedure with grant and loan recipients to verify appropriateness of funding and establish and maintain a positive relationship with JCRS, by January 2010.
    - 2.1.1 Director of Programs to interview JCRS staff to identify current procedures and processes of interacting with student scholarship recipients and solicit ideas for developing long-term, positive relationships with students by September 2009.
    - 2.1.2 Director of Programs, with the cooperation of a volunteer board member, to formalize a process for effectively managing student contacts so that long-term, positive relationships are fostered by January 2009.
    - 2.1.3 Director of Programs to implement new process by January 2010.
  - 2.2 Director of Programs, in cooperation with Technical Coordinator, to design and implement a formal program for loan repayments that enhances likelihood of collecting outstanding debts, by August 2010.
    - 2.2.1 Executive Director and Director of Programs to review current loan repayment and collection processes and results by April 2009.

- 2.2.2 Executive Director and Director of Programs to develop revised loan repayment and collection process by September 2009.
  - 2.2.3 Executive Director to review proposed processes and solicit ideas from appropriate Board members (e.g., Finance and Education Committees) by January 2010.
  - 2.2.4 Executive Director and Director of Programs to implement the new loan repayment and collection process, with Board approval if necessary, by August 2010.
- 3.0 *Special Assistance Program.* Provide case management, advocacy and needs-based financial subsidies for the care, developmental support and therapeutic services of dependent Jewish children with special needs.
- 3.1 Special Assistance Coordinator (SAC), in cooperation with Special Assistance Committee Co-Chairs, to formalize the process by which the Committee determines the appropriateness and feasibility of treatment plans and potential JCERS funding, by September 2009.
    - 3.1.1 SAC to consult with Case Committee co-chairs, to formalize the process by which the appropriateness and feasibility of treatment plans are determined, by June 2009.
    - 3.1.2 SAC to consult with special needs financial consultant, JCERS Treasurer and member of Finance Committee to formalize the processes by which the appropriateness and potential for JCERS funding is determined, by June 2009.
    - 3.1.3 Case Committee to review and approve plans developed in 3.1.1 and 3.1.2, above, by August 2009.
    - 3.1.4 EXCOM to review and, if appropriate, approve plans referred to in 3.1.1 and 3.2.2 by September 2009.
  - 3.2 SAC, in consultation with the Clinical Subcommittee, to formalize the composition, selection process and training of Clinical Subcommittee members by September 2009.
    - 3.2.1 SAC to consult with Clinical Sub-Committee of Case Committee to formalize the structure of the Clinical Subcommittee, including composition (by size and profession),

selection process and orientation program for members by June 2009.

3.2.2 Case Committee to review and approve the structure referred to in 3.2.1, above, by August 2009.

3.2.3 EXCOM to approve above structure by September 2009.

4.0 *Outreach Programs.* Address unmet needs of children and their caregivers in underserved segments of the Jewish community within the Region by implementing outreach programs that expand meaningful Jewish cultural experiences.

4.1 Director of Programs (DOP), in cooperation with a newly formed Outreach Services Committee (OSC), to formalize JCRS policy concerning the uses and possible expansion of support groups, including Grandparents Raising Grandchildren, Single Dad's Club, and Parents of Troubled Adults, and incorporate them into the JCRS program by December 2009.

4.1.1 EXCOM to create an Outreach Services Committee (OSC) to evaluate the continued operations and/or expansion of support groups by July 2009.

4.1.2 OSC, with cooperation of Budget Committee, to analyze costs associated with all support programs listed in Objective 4.3.1, above, by September 2009.

4.1.3 OSC, in cooperation Director of Programs, to complete evaluation of continued operations and/or expansion of support groups by November 2009.

4.1.4 OSC to submit its report and recommendations to EXCOM by December 2009.

4.2 PJ Library Coordinator, with assistance of Board liaisons to be named, to develop methods of identifying new clients and expanding the PJ Library Program to Jewish children in communities not served by the Program, by December 2009.

4.2.1 Budget Committee to evaluate cost effectiveness of PJ Library Program and make recommendations to EXCOM by July 2009.

- 4.2.2 If so recommended, EXCOM to establish Regional PJ Library Program Committee composed of non-New Orleans board members, to operate the program in their communities, by September 2009.
  - 4.2.3 Regional PJ Library Committee to develop methods of identifying new clients for the Program by November 2009.
- 4.3 SAC and DOP, in cooperation with OSC, to expand Hanukkah Gift Program into a regional JCRS program that involves Board and communities, strengthens volunteer program, and increases program visibility and support by February 2010.
  - 4.3.1 OSC, in cooperation with Budget Committee, to evaluate cost effectiveness of the Hanukah Gift Program by September 2009.
  - 4.3.2 OSC to review viability of the Program and, if appropriate, assume commensurate responsibility for operations of the Program, by November 2009.
  - 4.3.3 OSC to develop a plan to engage additional volunteers and increase Program viability and support by February 2010.
- 4.4 SAC to formalize the Special Friends Program that provides regular recognition of accomplishments and special milestones of Jewish children who are outside the mainstream Jewish Community by February 2010.
  - 4.4.1 Budget Committee to evaluate cost effectiveness of the Special Friends Program by September 2009.
  - 4.4.2 If so advised by Budget Committee, OSC to assume commensurate responsibility for the Program by November 2009.
  - 4.4.3 OSC to prepare a program description and budget for Special Friends Program by February 2010.

## DEVELOPMENT/FINANCE/MARKETING

### ACTION PLAN

#### Goals

- 1.0 *Development.* Ensure JCRS financial strength and viability by increasing and sustaining diverse revenue streams.

#### Objectives

- 1.1 Development Committee, a standing committee to be formed, which will include the Executive Director, to design and implement an ongoing multi-state, multi-year fundraising program to increase donations to JCRS by March 2010.

#### Tasks

- 1.1.1 Executive Committee to create and appoint members to the Development Committee by April 2009.
- 1.1.2 Executive Director, in cooperation with Director of Programs, to collect data on funding sources and fund allocation by metropolitan area and state by May 2009.
- 1.1.3 Development Committee to analyze data to identify funding/development imbalances by cities and states (receipt of JCRS support compared to donations to JCRS) and new fundraising opportunities by June 2009.
- 1.1.4 Development Committee to submit proposed new development activities to the Executive Committee for review and approval by September 2009.
- 1.1.5 Executive Director, in cooperation with Development Committee and Staff, to begin implementation of new development activities approved by Executive Committee by October 2009.
- 1.2 Development Committee to create a “Jewish Family Foundation” outreach plan that fosters sustainable, long-term relationships with

family supporters, resulting in new grant sources for JCRC by December 2009.

- 1.2.1 Executive Director, in cooperation with the Director of Programs, to assemble data on existing grants and foundation gifts by May 2009.
  - 1.2.2 Director of Programs to research and make recommendations to Development Committee about enrolling in a service that provides information on, and qualification criteria of, charitable foundations by May 2009.
  - 1.2.3 Regional Board members to be asked to identify potential grant sources and foundation gifts in their areas by May 2009.
  - 1.2.4 Development Committee, in cooperation with Executive Director and staff, to create and implement new short-term and long-term strategies that seek new, sustainable funding from family foundations and that create positive ongoing relationships with donors by December 2009.
- 1.3 Development Committee, in consultation with Association of Fundraising Professionals or an independent fund raising consultant, to evaluate the cost effectiveness of existing fundraising and promotional materials and determine how they can be improved by October 2009.
- 1.3.1 Executive Director, in cooperation with a volunteer Board member, to compile all current fundraising and promotional materials in preparation for review by May 2009.
  - 1.3.2 Development Committee to contact Association of Fundraising Professionals or an independent fund raising consultant (see 1.4.2. below) to seek assistance in evaluating current fundraising and promotional materials by May 2009.
  - 1.3.3 Development Committee in cooperation with fundraising professional, to develop recommendations for new and revised fundraising and promotional materials by July 2009.
  - 1.3.4 Development Committee, in cooperation with Executive Director and staff, to create and implement phase in plan for

new and revised fundraising and promotional materials by October 2009.

- 1.4 Development Committee to recommend to the Board new fundraising activities to include, among others, partnerships with other agencies, events, further development of donor lists and one-on-one donation requests, by January 2010.
  - 1.4.1 Executive Director, in cooperation with a volunteer Board member to be named, to compile data on cost of existing fundraising and promotional materials by May 2009.
  - 1.4.2 Development Committee to contact Association of Fundraising Professionals or an independent fund raising consultant (see 1.3.2. above) to seek assistance in developing new, cost-effective fundraising materials by May 2009.
  - 1.4.3 Development Committee, in cooperation with the fundraising professional(s), to create a strategic development plan, incorporating short-term and long-term strategies for fundraising by October 2009.
  - 1.4.4 Development Committee, in cooperation with the staff, to begin implementation of new development plan by January 2010.
  
- 2.0 *Finance.* Guarantee JCRS fiscal integrity through effective Board oversight, professional accounting and reporting standards, internal controls and financial resource management.
  
- 2.1 Executive Committee, in cooperation with the Trustees of Southern Jewish Children's Fund (Trustees), to recommend to the Board an ongoing process for oversight of the Endowment Management Plan, including drafting of position descriptions for Fund trustees, by July 2009.
  - 2.1.1 EXCOM and Trustees to address and reach agreement on issues relating to Board/Endowment policies ,including, but not limited to, position description for Trustees, Trustees tenure, signature rights, and content and frequency of Endowment reports to the Board, by June 2009.

- 2.1.2 EXCOM to report to Board on results of policy discussions by July 2009.
- 2.2 Finance Committee to review annually JCRS internal accounting controls and make report and recommendations to EXCOM concerning suggested changes, if any, by September 2009 and ongoing.
  - 2.2.1 EXCOM to agree on Finance Committee position descriptions, including provisions for tenure, by May 2009.
  - 2.2.2 Finance Committee to meet bi-annually with JCRS external auditors and annually together with office manager, to review processes and controls, beginning with 2009-2101 fiscal year.
  - 2.2.3 Finance Committee to report on meetings referred to in 2.2.2, above, to EXCOM beginning in September 2009 and annually thereafter.
- 2.3 Finance Committee to formalize budgetary policies and processes, which will assure that funds are allocated and used in an effective and consistent manner, by March 2010.
  - 2.3.1 Finance Committee to prepare written policy statement on budgetary policies and processes and, specifically, address ongoing conflict between deficit and break even budgeting, by January 2010.
  - 2.3.2 Finance Committee to determine a method, appropriate to JCRS operations, of distinguishing between administrative and programmatic costs in budgetary and reporting processes, by September 2009.
- 3.0 *Marketing.* Develop and implement a marketing plan and a branding program, built on JCRS unique history and heritage, which informs clients, supporters and the general public of JCRS services.
  - 3.1 Marketing Committee, a standing committee to be formed, to develop a JCRS “brand” and image that will be incorporated into all marketing materials and messages, and submit to Board for approval by December 2009.

- 3.1.1 Executive Committee to appoint a Marketing Committee that may include external advisors and experts by April 2009.
  - 3.1.2 Director of Programs to assemble previous and current marketing materials for review by the Marketing Committee by June 2009.
  - 3.1.3 Marketing Committee to retain, with approval of the Executive Committee, a professional marketing firm to advise JCRS on re-evaluation of JCRS brand and launch of new branding plan by July 2009.
  - 3.1.4 Marketing Committee to recommend branding plan to EXCOM by October 2009.
  - 3.1.5 EXCOM to recommend approval of branding plan to Board so that Marketing Committee and staff can begin implementation by December 2009.
- 3.2 Marketing Committee, in cooperation with Director of Programs, to develop a comprehensive marketing strategy that emphasizes innovative outreach methods, such as internet and web-based fund raising, by February 2010.
- 3.2.1 Marketing Committee to review current marketing strategy and begin creation of a marketing action plan by September 2009.
  - 3.2.2 Marketing Committee to meet with JCRS staff to review expected capabilities and usage of new software in concert with the new marketing plan by September 2009.
  - 3.2.3 Marketing Committee to submit preliminary marketing plan to the Executive Committee for review and approval by December 2009.
  - 3.2.4 EXCOM to approve preliminary marketing plan so that it can be finalized and implemented by February 2010.

## SETTING PRIORITIES

On March 10, 2009, the Strategic Planning Committee prioritized the objectives of the three Action Plans: Organization & Governance (O&G), Program and Development/Finance/Marketing (DFM).

The purpose of this exercise was to provide ongoing guidance to the JCERS Board and staff as it allocates scarce human and financial resources to accomplishing the 28 objectives contained in the Strategic Plan. It was affirmed by the SPC members that, regardless of the results of the prioritizing exercise, all of the objectives are important to the future of the Jewish Children's Regional Service, are part of the JCERS blueprint for the future and will be implemented.

However, JCERS operates in an ever-changing and challenging environment and economy. As a result, ongoing decisions concerning implementation will be made from both budgetary and programmatic viewpoints as to which objectives should have the highest priorities should resources be constrained. Members were asked to rank each of the 28 objectives based on the following criteria: impact, feasibility and compatibility; impact and timing and engagement and image.

This strategic planning process was organized by the JCERS Board. The Strategic Planning Committee included the Executive Director. The Board invited all professional staff members to participate, and they became an integral part of the planning process, including voting on priorities.

Following is the result of the voting for each objective and, in the last column, identification of the 10 highest ranked objectives from all three Action Plans. Six of the highest ranking objectives are from the Development/Finance/Marketing Action Plan and four are from Organization & Governance. There are no high ranking objectives from the Program Action Plan.

The reason for the relatively low rankings of the Program Objectives is probably best explained by reviewing the SWOT analysis (Appendix A). Note that the Strengths and Weaknesses analysis indicates relatively few weaknesses in the Program area and a much larger number of strengths. This situation is reversed in the other two critical areas, Organization and Governance and the funding-oriented DFM. Therefore, the highest priorities were awarded to those Objectives that, at this time, are most critical for the continued viability of the agency, namely fundraising and operations.

## The Ten Ranking Objectives in the Strategic Plan

1. O&G 1.1 Governance Committee
2. O&G 2.2 Information Technology (IT) System
3. DFM 3.1 Develop JCRS Brand and Image for Marketing
- 4.\* DFM 1.1 Multi-State, Multi-Year Fundraising Program
- 4\* DFM 1.4 Create New Fundraising Activities
6. DFM 1.3 Evaluate Existing Fundraising Programs
7. O&G 2.3 Improve JCTS Website
8. DFM 3.2 Develop Comprehensive Marketing Strategy
9. O&G 1.2 Enhanced Regional Outreach (Regional Working Committees)
10. DFM 1.2 Jewish Family Foundation Outreach Plan

\* Two objectives had identical scores.

## Strategic Plan Prioritization Results

Objective Description	Rank	Total Points
O&G 1.1 Governance Committee	1	128
O&G 1.2 Enhanced Regional Outreach (RWC)	9	116
O&G 1.3 Position Descriptions for Officers, Board	17*	93
O&G 2.1 Inventory of Organizational Functions (OMC)	14*	96
O&G 2.2 Information Technology (IT) System	2	127
O&G 2.3 Improve JCRS Website	7	118
O&G 3.1 Communication Technology	11	107
O&G 3.2 Intra-Office Communication Process	17*	93
O&G 3.3 Board Orientation Program	20	91
PR 1.1 Expand Camp Recruitment Program	24	85
PR 1.2 More Active Involvement of Camp Committee	25	83
PR 2.1 Contact with College Grant/Loan Recipients	21	90
PR 2.2 Improve Process for Repayment of Loans	22	88
PR 3.1 Treatment Plans and Costs for Special Assistance	14*	96
PR 3.2 Clinical Sub-Committee Selection and Training	16	95
PR 4.1 Policy for Uses and Expansion of Support Groups	23	86
PR 4.2 PJ Library Program Expansion	26	69
PR 4.3 Expand Hanukah Gift Program to Region	27	68
PR 4.4 Formalize Special Friends Program	28	65
DFM 1.1 Multi-State, Multi-Year Fundraising Program	4*	123
DFM 1.2 Jewish Family Foundation Outreach Plan	10	111
DFM 1.3 Evaluate Existing Fundraising Programs	6	119
DFM 1.4 Create New Fundraising Activities	4*	123
DFM 2.1 Endowment Management Plan Oversight	12	106
DFM 2.2 Review Internal Accounting Controls	17*	93
DFM 2.3 Formalize Budget Policies and Processes	13	97
DFM 3.1 Develop JCRS Brand and Image for Marketing	3	125
DFM 3.2 Develop Comprehensive Marketing Strategy	8	117

\* Two or three Objectives had same points and rank

## **IMPLEMENTING THE STRATEGIC PLAN**

Throughout this strategic planning project, the importance of implementation and monitoring was emphasized. The success of the Plan will be measured by the positive organizational, programmatic, fund raising and other changes that result from reaching the goals and accomplishing its objectives.

The first step in implementing the Strategic Plan was its adoption by the JCRS Board at its annual meeting on March 22, 2009. The next step will be to organize the new committees, identified in the Plan, as responsible for implementing many of the Objectives. A list of these committees is included in Appendix D.

It will also be critically important to share the Plan with JCRS Board members and supporters throughout the seven-state mid-South region. This is essential to insuring the continued interest and support of those who will be affected by changes in JCRS governance policies, as well as insuring the availability of the human and financial resources needed to implement the Plan's 28 objectives.

To insure that the Plan is realistic and credible, over 40 Board members and staff, mostly from New Orleans, but also with representatives from Beaumont, Houston and Little Rock participated in creating the Plan. (See Appendices B & C for SPC and Task Force rosters.) As a result of this process, a momentum has been created among the members of the Strategic Planning Committee and its three task forces. This enthusiasm augurs well for success in implementing this ambitious program.

It is recommended that responsibility for monitoring the Plan be assigned to an Implementation Management Committee (IMC) composed of the following nine persons: Immediate Past President, Chair of Strategic Planning Committee, Chairs of each of the three Task Forces, the three Vice Presidents, and the Executive Director. One staff person should be assigned to provide support for the Committee. (Initially, one Task Force Chair will also serve as a Vice President, reducing the Committee to eight.)

The IMC will monitor the quality of the implementation effort and adherence to the time schedule, as reflected in the Action Plans. It should meet monthly to assess progress on each of the Plan's 28 objectives. Preliminary estimates of costs associated with implementing this Strategic Plan are listed in Appendix E. An example of a chart that can be modified to use in monitoring implementation can be found at Appendix F.

## Appendix A

### SWOT ANALYSIS

#### Strengths & Weaknesses

#### Programs

Strengths	Weaknesses
Program Evaluation Committee is active in reviewing the three major programming areas.	JCRS camp experience is limited to domestic camps; program does not offer post camp experiences.
Education Committee is very active and well-organized; extremely effective in allocating funds.	JCRS funding as total percentage of college costs is low; raises question of less money for more people or more funds for fewer people.
Sending needy Jewish children to a Jewish camp experience fosters “Jewish Identity”, particularly for kids from communities with small Jewish populations.	If the Special Needs program were more actively marketed, JCRS would likely have more applications since it is assumed that there are more potential clients than now being served.
JCRS college funding is a wonderful program that is effective in assisting needy Jewish youth.	
Staff support for the Education Committee is effective; processing of applications always completed prior to Committee review.	
Follow-up and support for students using JCRS education funding is very effective.	
JCRS turns down very few people who need funding; <b>some</b> funding is generally available for those in need.	
Special Needs Committees (General and Professional) are strong; they devote time and are committed to reviewing client needs and making recommendations.	
Special Needs program is the only one of its kind in US.	
Special Needs program goes beyond financial help, actually provides support and ongoing professional guidance for clients.	
Special Needs program is an effective and efficient use of funds.	
JCRS programs offer continuity of support and services for needy Jewish children from infancy to college.	

## Development/Finance/Marketing

<b>Strengths</b>	<b>Weaknesses</b>
Mailing and marketing pieces are very well done.	JCRS Website needs to be updated.
Ned's visits ("coffee klatches") to cities outside New Orleans are low-key and effective.	Highly dependent on direct mail for fundraising.
History and tradition of JCRS fundraising has been low-key and low-pressure, creating high degree of loyalty among donors and supporters ("They get it.").	Marketing efforts outside of New Orleans are not as aggressive and visible as it could be.
Individuals can create a scholarship fund or endowment for a very small amount of money.	Lack of a comprehensive, fully developed marketing program.
Current endowment is a strength (income provides about 1/3 of operating budget).	Difficulty in following up on event ("coffee klatches") participants results in not realizing full benefit of outreach efforts.
If Special Needs program was marketed it would likely help raise more funds.	Do not have a building or office that gives identity to organization.
	Lack of fundraising throughout region, and significant reliance on endowment.
	New Orleans provides a disproportionate amount of income compared to region.
	JCRS backs into determining its fundraising needs by first identifying programming and operational costs.
	JCRS does not adequately use JCRS Education Scholarship Program as a fund-raising marketing device.

## Organization and Governance

<b>Strengths</b>	<b>Weaknesses</b>
Competent and productive staff; very responsive to clients and donors	Small staff compared to other organizations; four full time.
Lean organizational structure supported by part-time staff, low “burn rate.”	Organizing workload of part-time staff is more difficult than for a full-time staff.
Excellent management supervision of staff operations.	JCRS’ small footprint (organized presence) outside New Orleans negatively affects support, funding, and operational potential of mid-South Region.
Active and committed Board members in New Orleans that can be built upon to expand Board and volunteer support in other cities (“export the New Orleans model”).	Lack of reliable, usable data base concerning JCRS donor base; insufficient data to provide ongoing statistical analysis (technology deficiency).
Board involvement in review of applicant needs helps reinforce JCRS Mission and commitment.	Client data not ready for analysis; not integrated for cross referencing (technology deficiency).
	Lack of current job descriptions for President, Directors, Executive Director and staff.
	Oversized board (200+) is unwieldy, inhibits governance and oversight functions and prevents many Board members from feeling a part of the decision-making process..
	Board has not assumed responsibility for fund raising activities.
	General perception throughout the seven-state Region that JCRS is a New Orleans organization the is not truly regional.
	Lack of “new blood” to participate in work of Board and committees.
	Not utilizing out-of-town Board members effectively,
	Camp Committee is not active enough and does not meet very often. (There is a need to review Committee’s involvement in application approval process).
	Lack of effective communication with Board members regarding JCRS programming elements.

# SWOT ANALYSIS

## Opportunities & Threats

### Demographic Trends

<b>Opportunities</b>	<b>Threats</b>
More clients in New Orleans resulting from post Katrina economy	Younger Jewish population, including families, leaving New Orleans area due to lack of economic opportunities and post-Katrina fears
Entrepreneurial opportunities for young singles in N.O.	Increase of interfaith marriages resulting in reduced funding for Jewish charities
Possibility to expand JCRS to other states beyond the current seven-state region	Decline of Jewish population in smaller cities and rural areas
Growing younger Jewish population in large southern cities within mid-South region other than N.O.	Expanding services to new areas initially results in more clients without new funding support for them (funding trails clients)
Migration of Jewish population from small cities and rural areas to larger cities	Difficulty in identifying Jewish families and children in smaller cities due to lack of synagogues and Jewish institutions
Identify other needs that can be met by expanding JCRS Mission	JCRS services may overlap with other charities, unless JCRS has a distinctive identity as provider of unique services
Larger cities with growing Jewish populations provide enlarged funding opportunities	JCRS losing its niche in service arena

## National Economic Concerns

<b>Opportunities</b>	<b>Threats</b>
Current and increasing need for JCRS services enhanced, affirming rationale for its existence.	Recession reduces investment income from JCRS endowment as a percentage of JCRS budget.
Chance to explore and test new methods to see which ones work, e.g., Internet, Face Book links and networking, offers opportunities to seek new funding sources and methodologies.	Must address greater needs with fewer resources.
	Charitable giving throughout US likely to decline.
	JCRS may have fewer resources, resulting in contraction of services and difficult choices: either fewer clients can be helped or those that are helped will be assisted at lower level of service.

## Jewish Charities Environment

<b>Opportunities</b>	<b>Threats</b>
Possibility to coordinate delivery of JCRS services with those of other Jewish organizations.	Cooperation with other charitable organizations may result in loss of JCRS unique identity.
Cooperation with other Jewish organizations may contribute to identifying more clients for JCRS	Confusion exists within Region over identity and mission among Jewish charitable organizations.
Higher visibility may strengthen JCRS identity and enhance fund raising potential	Potential loss of funding may result from loss of identity.
JCRS identity as an independent service organization (not under JWF umbrella) may result in more funding.	Competition among organizations for funding,, especially in times of economic recession, may be counter productive
Independence is a positive factor for programming; as it allows greater flexibility and faster response to meeting needs.	Lack of formal affiliation with Jewish Federation diminishes JCRS ability to access Federation fund-raising capability.
Enhancing JCRS visibility outside New Orleans enables outreach into regional growth areas for new support and involvement (e.g., alumni association).	JCRS history of receiving about 30% of funding from New Orleans and Louisiana, which comprise only 6% of regional population.
Jewish Federation permits some independent fundraising for small agencies.	Difficulty in identifying and involving the “right” people outside of New Orleans to offer their time and effort to develop satellite JCRS organizations throughout the mid-South region.
Promoting “Jewish Identity” is a high priority for JCRS, provides a positive fundraising message.	
Charitable giving is an essential element of Jewish theology.	

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### COMMITTEES WITH RESPONSIBILITIES IDENTIFIED IN ACTION PLANS

The Action Plans provide that responsibilities for implementing the 28 Objectives are assigned to a variety of old and new committees. Listed below are the responsible committees for each Action Plan. New committees created by the Strategic Plan are indicated by asterisks.

#### Organization & Governance

- Governance Committee \*
- Regional Working Committees \*
- Committee to draft position descriptions \*
- Office Management Committee \*
- Information Technology Committee \*
- Media Committee \*

#### Program

- Camp Committee
- Special Assistance Committee
- Clinical Sub-Committee
- Case Committee
- Finance Committee
- Education Committee
- Outreach Services Committee \*
- Budget Committee
- Regional PJ Library Committee \*

#### Development/Finance/Marketing

- Development Committee \*
- Southern Jewish Children's Fund Trustees
- Marketing Committee \*
- Finance Committee

## Appendix E

## STRATEGIC PLAN COST ESTIMATES

### *Definitions and Legends*

#### ***Category Definitions***

- (1) No costs associated with implementation
- (2) Modest costs due to increased hours of part-time professional staff
- (3) Increased budget due to cost of software, hardware, consultants services and program support

#### ***Legend***

RWC	Regional Working Committee
OMC	Office Management Committee
ITC	Information Technology Committee
CC	Camp Coordinator
SAC	Special Assistance Coordinator (formerly Special Needs)
OSC	Outreach Services Committee
DevC	Development Committee
EXCOM	Executive Committee
MC	Marketing Committee

#### ***A Note regarding Estimated Costs***

Category 2 costs are estimated by the Executive Director based on the need to allocate additional hours to part time professionals to implement objectives and tasks not covered by their current position descriptions and/or responsibilities.

Category 3 costs include equipment purchases, program support and consultant services. They are the Executive Director's preliminary estimates only, and are subject to revision during the procurement process.

## Appendix F