

## **Annual Report**

### **MISSION**

“The Association of Jewish Family and Children’s Agencies fosters the work of its member agencies’ professional and volunteer leadership in serving their clients and communities. Through advocacy, consultation, education, and networking, the Association promotes services and policies that assist Jews in need, sustains healthy Jewish individuals and families, and strengthens individual and family connections to the Jewish and general communities.”

AJFCA completed its most recent Strategic Plan in 2006, a copy of which was included with a previous year’s questionnaire. The current formal Mission Statement was adopted as part of that Plan. In simpler terms, AJFCA’s mission is to help our member agencies do their job better.

### **PROGRAMMATIC FOCI**

All of AJFCA’s program initiatives are focused on the policies and services that influence most directly the work of the Jewish family service network in North America. Our members recognize the value in participating in a system that is broader than that available in their localized settings. Whether it is to join together to support certain policies or to learn from one another, AJFCA is the facilitator of the channels of communication and the exchange of resources and experiences.

The 2006 Strategic Plan reemphasized our membership’s desire for continued educational programming; for increased sharing and circulation of ideas among our members and enhanced advocacy for the Jewish social service agenda. Based on the recommendations of the Plan, we continue to offer an Annual Conference of the highest quality and expand the use of the web-based forum, list serves, other electronic forms of communication and conference calls for various lay and professional categories. We are also engaged in several other initiatives:

- Providing a forum for sharing of information and issue resolution in current “hot topic” areas. Recent and ongoing topics include: Succession Planning, Governance Self-Assessment, Assessing Marketing Outcomes, Community Needs Assessment, CEO Evaluation Process, Use of Agency Endowment, Successful Initiatives, Responding to the Economic Downturn, Quality Performance Measures and New Program Ideas for the Small JFS Agency.
- Working with a website design and marketing firm to completely redevelop AJFCA’s website to be more functional for our member agencies as well as clients and others. New design will include a searchable member directory, annual conference information, news, trends and press releases, updated forums, a resource library, webinar information and fundraising information. Along with the updated website, AJFCA will present a completely revised logo and brand identity.
- Securing value-added products and services for our members at a discount as part of their membership benefits. Some products and services secured include: Foundation Directory Online subscription secured at a greatly reduced fee, discounts available through the Purchasing Point program and reduced online educational tools available through Ed2Go.

- Expanding member programming through the addition to the staff of a Director of Programs who is responsible for bringing substantive information to member agencies regarding the operation of their programs, strategic planning for AJFCA, tracking member engagement and various programming related to the annual conference.
- Expanding communications throughout the AJFCA network through the addition to the staff of a Manager of Membership Services and Communications who is responsible for publishing the weekly e-newsletter, managing website content, communicating with AJFCA members and other related agencies and linking to value-added products and services to our members.

## **MAJOR ACCOMPLISHMENTS OF 2010**

- Launched website redevelopment project, beginning with a committee comprised of marketing professionals from some of our member agencies. Researched and hired a website development firm, surveyed members for input on the identity of AJFCA and the functionality desired in a new website. Selected a new AJFCA logo and began work on the site map for the new website.
- Created written goals for AJFCA and began a process to determine the measurable outcomes for AJFCA. Researched potential database tools for tracking member engagement in the Association.
- Increased contact with member agencies through in person visits to fourteen agencies that included tours of their facilities and meetings with professional and board leadership. Consulted with many of our agencies by phone on strategic issues involved in the operation of their agencies, including succession planning, fund development and program development.
- Increased participation with other national associations through meetings, phone calls and webinars. Shared ideas and resources through the Faith-Based Roundtable and other collaborative bodies.
- Conducted a series of conference calls with current and incoming board presidents of our member agencies. Topics included fund raising through the board, major board responsibilities, soliciting board involvement and board-professional relationships.
- Continued to improve the quality of communications through thoughtful posts in our weekly e-newsletter that link our agencies and their lay and professional leaders to current trends, resources, funding sources, and advocacy issues.
- In the area of legislative advocacy, AJFCA worked closely with the Washington office of JFNA to advocate for legislative initiatives in a number of domestic policy areas including the Affordable Care Act, senior transportation and aging issues, Holocaust survivor protection, and child welfare and nutrition. Additionally, AJFCA works with JFNA on behalf of its agencies to secure federal grants.
- Provided an Annual Conference for over 230 attendees that generated significant enthusiasm, intelligent conversation and excellent evaluations.
- Began work on a project to offer Long Term Care Insurance policies to staff and affiliated persons of AJFCA member agencies. This project has the potential to provide revenue to AJFCA based on policy sales. The project is beginning to take shape and should be fully launched in 2011.

- AJFCA has continued its initiative to diversify its funding streams in order to respond to the challenges of some of our member agencies in meeting their dues requirements. Sponsorships continue to grow and have evolved from relating solely to the Annual Conference to providing sponsorship benefits throughout an entire year. Benefits include the facilitating of webinars with our member agencies on behalf of the sponsor, providing information on the sponsor in our e-newsletter and the potential to link to the sponsor on our website.
- AJFCA has provided various products and services to our members at a greatly reduced rate as a benefit of membership. For example, we secured a group subscription to the Foundation Center's Foundation Directory Online, the nation's leading online resource for grant seekers for our participating members at 30% of its regular cost. In addition, AJFCA is a participating member in Purchasing Point and provides its members the opportunity to secure many products and services at 20-40% discounts through this program that is free of charge to them. AJFCA also entered into a relationship with ed2go to bring online educational products to our members at a reduced rate.
- AJFCA has redeveloped its staffing model to include additional professionals to bring value to our members. In 2010, AJFCA added to its staff a Director of Programs and a Manager of Membership Services and Communications to further serve our members. We have continued to streamline our overhead services through contracting with Baltimore's Jewish federation for human resources, information technology and accounting services as well as employee benefits.
- Brought 32 people to Washington, DC to advocate on behalf of social service issues critical to the Jewish community in the United States.
- Expanded our international relationships through conference calls with related agencies in London, Paris, Israel and Russia. Facilitated an international webinar on the topic of *Serving an Aging Jewish Community: A Global Perspective*.

## **MAJOR PRIORITIES FOR THE NEXT YEAR**

In the coming year, AJFCA will focus on:

- Launching our newly redeveloped website which will serve as a technologically-current platform for information sharing and communications within and outside the AJFCA community.
- Begin a strategic planning process through a special committee of AJFCA's Board of Directors.
- Begin tracking AJFCA's outcomes, including measures of member engagement in AJFCA and leadership provided by AJFCA.
- Continuing to improve the quality and presentation of communications and interactivity with constituents through our e-newsletter, conference calls and at least one regional meeting.
- Diversification of funding sources to reduce the reliance on the current dues structure.
- Continue to explore possibilities for value-added products and services for our members.
- Institute relations with Israeli social service agencies and professional organizations, which began in late 2009. Continue work on relations with other international social service agencies, including Jewish Care London.

- Helping our members respond to the increased demand on their services.
- Working with the U.S. and Canadian Administrations to set a national agenda that supports needed social services.
- Adjust the format of our Washington legislative mission to include a much wider participation base from AJFCA member agencies.
- Exploring new sources of funding and collaborations with other national agencies and foundations.

## **OUR FIVE-YEAR PRIORITIES**

Over the next five years, AJFCA plans to adopt and begin to implement a new, revised Strategic Plan, which will bring up to date our planned initiatives to reflect the current times and structure of AJFCA. AJFCA plans on being a flexible organization, to be forward-thinking and quick to react when required. We expect our new plan to include the following:

- Institute measurable goals for each aspect of the organization.
- Work to expand our membership within the United States and internationally.
- Develop new ways to provide consultation and training in fund development and income generation to staff and lay leaders, including exploration and the use of new technology.
- Continue to expand our on-line personnel resources through a Resource Library to be located on our website and accessible by all of our member agencies.
- Expand consultation and training in areas such as: Outcomes Identification and Measurement; Marketing; Board Development and Engagement; Fund Development; and Social Enterprise.
- Greatly expand local agency participation in our Legislative Affairs programming and our work with JFNA's Washington Office. Expand our legislative initiatives in Canada.
- Be the leading voice nationally on social service issues critical to the Jewish community.
- Continue to diversify our funding streams, so that we are not overly dependent on any one source or stream of funding.
- Seek to form partnerships that will sustain and increase the capacities of our agencies and provide direct benefits to our members' clients and communities.

## **IMPACT OF ECONOMIC ENVIRONMENT**

AJFCA had a strong year in 2010 despite the difficulties experienced by some members in paying full dues. The budget accommodated for dues reductions and other revenue sources, in particular annual sponsorships, exceeded the budgeted amounts. Additionally, expenses were decreased from previous years in office expenses, occupancy costs, and salaries. In February, 2010 the AJFCA office relocated from an independent site in East Brunswick, New Jersey, to a sub-lease of less space in the Jewish Community Services building in Baltimore, Maryland. Additionally, the bookkeeping function formerly performed by a staff member has been outsourced, and administrative assistant functions have been combined. All of these changes together result in cost savings of approximately \$120,000 in the 2010 budget from the previous year's budget.

AJFCA has never had significant endowment funds. In 2009, we received a five year grant from the Margaret A. Cargill Foundation for \$50,000 and 5000 shares of Cargill stock or the cash equivalent. AJFCA is likely to receive the proceeds from a stock transaction in 2011, and this will form the basis for building an endowment fund.

### **LEADERSHIP CHANGES**

Lee Sherman continues to serve as the President/CEO since March 1, 2009. In May 2010, Lisa Budlow joined AJFCA as the Director of Programs. In July 2010, Shelley Rood replaced Amy Aarons Rosen as AJFCA's Washington Director. As of December 31, 2010, Joan Strauss, former Director of Programs and AJFCA Consultant, and David Levinsky, Director of Special Projects, both retired. On January 17, 2011, Megan Myers joined the AJFCA staff as Manager of Membership Services and Communications.

Harvey Zeller, of Metro West, NJ, became Board Chair in January 2009. His term expires at the Annual Conference in May, 2011. At that time, Barry Klickstein, of North Shore, MA, will begin his term as AJFCA Board Chair.

### **STRATEGIC PLANNING**

At the January 2011 AJFCA Board meeting, the Board determined its desire to enter into a strategic planning process. The Board agreed to appoint a special committee to launch the process. The special committee will report its progress to the Board at its meeting in May 2011.

### **PARTNERSHIPS**

AJFCA partners with HIAS in the resettlement of refugees throughout the United States and with JIAS in the resettlement of refugees throughout Canada.

AJFCA and the International Association of Jewish Vocational Services (IAJVS) conducted a joint Annual Conference in 2007 and are in discussion to collaborate on our conferences in 2011.

AJFCA continues to work on projects with the Association of Jewish Aging Services (AJAS) and the Jewish Communal Service Association (JCSA). In the fall of 2010, AJFCA helped in the planning and promotion of three international webinars with JCSA and the World Conference of Jewish Communal Services.

AJFCA is an active member of the National Human Services Assembly (NHSA) and two of our staff members are currently participating in the NHSA's Emerging Leaders Council.

AJFCA partners with JCPA in their poverty initiative.

AJFCA works closely with the JFNA Washington Office in advocating for public policy issues. AJFCA and the JFNA Washington Office are joint employers of a staff member who concentrates on the social service agenda in Congress.

## **OUR BUSINESS MODEL**

On several occasions, the AJFCA Board of Directors has affirmed our primary role as a membership organization. Accordingly, AJFCA will continue to offer programs and services that support our members and may also produce some income for AJFCA in support of member services.

AJFCA's members include approximately 127 local Jewish family service agencies located in 35 states in the United States and five Canadian provinces. Our intention is to continue to increase AJFCA's potential to advocate and educate on the human service issues vital to our community and to shape the national agenda focusing on those priority issues facing our member agencies.

AJFCA receives no government funds at this time.

AJFCA currently has 5.90 FTE staff.

AJFCA is governed by a Board of no more than 30, with a target of equal representation on the Board of lay leaders and agency CEOs. The Plan also calls for the Board to be as representative as possible by agency size and geography.

## **ISSUES FACING LOCAL AGENCIES**

### **❖ COPING WITH THE CURRENT ECONOMIC CRISIS**

- Providing increased financial support to those in need.
- Increased demand on other core services.
- Providing services to those in need at reduced rates.
- Coping with the decrease in agency endowments.
- Coping with the decrease in funds from funding sources.
- Expanding career services or initiating employment services for the first time. Our agencies are on the frontlines of the unemployment and underemployment crisis. Funding for these services is difficult to obtain, but the demand for the services is at an all-time high.

### **❖ SERVICES TO OLDER ADULTS**

- In-Home Services
  - Includes Homemaker services, chore services, nursing services and/or combinations thereof. Future older adults will expect to bring all needed services into their own homes, and many will look to the Jewish community for those services.
- Guardianship
- Case Management
  - Families will look to agencies to coordinate services and ensure their quality. How these will be paid for remains a major issue. Families don't want to pay, older adults don't either, yet there needs to be compensation.

- Cluster Apartments
  - Several older adults living together with services provided by the agency or managed by the agency.
- Transportation
  - Virtually every community agrees that this is one of the most needed services. It can be provided by agency/community vehicles and/or volunteers or by an older adult receiving a stipend to provide the service.
- Volunteer Opportunities
  - Many baby boomers are looking for hands-on opportunities. Providing transportation or offering companionship either in-person or by telephone are examples, but there are many other options. Agencies need to become more open to volunteers, particularly in areas that have been traditionally viewed as “professional.”
- Career Services
  - Many older adults will be interested in new careers. Total retirement will be unusual. The economic conditions have created large numbers of unemployed and underemployed in our communities. Many of our agencies have large career services programs that are now being overwhelmed with demand. Even our smallest agencies are now doing some form of career services.

#### ❖ SERVICES TO CHILDREN

- The Autism Spectrum
  - Services to this population which range from Asperger’s Syndrome to Autism will include direct services to special groups for children and/or support groups for adults with children so diagnosed as community needs dictate.
- Attention Deficit Disorder
  - ADD, ADHD, etc. Groups for children so affected and/or support groups for parents.
- Adopted Children
  - Children who have been adopted often feel alone and different. Groups of adopted children and also groups for their parents can be helpful.
  - Increasing numbers of agencies are returning to the provision of direct adoption services, usually by conducting home studies and supervision.

#### ❖ SERVICES TO ADULTS

- Attention Deficit Disorder
  - Adults too have ADD and frequently are in need of assistance, clinical and vocational, and/or support groups.
- Adoption
  - Parents of adopted children often need assistance as their children grow older.
  - A “Stars of David” support group for adopting families is frequently sponsored by JFS’s.
- Career Services and Financial Stability

- Helping the ever expanding universe of individuals returning to the job market, recently retrenched, or considering changing careers. Many of these individuals have not been in the job market for decades and so even professionals need basic career guidance.
  - Helping individuals and families become more financially literate, including household budgeting.
  
- ❖ SERVICES TO SPECIAL POPULATIONS
  - Cluster Housing for Developmentally Disabled Adults
    - Several developmentally disabled adults living together with services provided by the agency or managed by the agency. These programs are expandable or contractible as the population warrants.
  - Disease/Physical Condition Groups
    - Support groups for people with specific diseases or conditions, e.g., amputees, people with MS, genetic diseases, including Gaucher's, etc.
  
- ❖ EMERGENCY SERVICES
  - In the event of a natural or man-made disaster, agencies are utilizing trained staff as counselors and/or for direct services.
  - Local agencies have offered their services in other communities that are faced with disasters, particularly for short-term and long-term trauma-related counseling.
  
- ❖ COUNSELING
  - Counseling services are diminishing as funding changes. Counseling services integrated into other services, rather than as a stand-alone, seem to be more viable. Agencies are exploring a number of options including changing the employment status of clinicians.
  
- ❖ INTERNAL AGENCY NEEDS
  - Total Resource Development – AJFCA has held a number of webinars and conference sessions on all aspects of fund development as member agencies have been continually cut by traditional sources of revenue like federations, United Ways, and government grants and contracts.
  - Succession Planning -- Managers at all levels are aging. Agencies must develop succession plans for all levels of management, not just for the CEO. The average non-profit CEO stays in his/her position five years. Fewer individuals are considering careers in Jewish Communal Services.
  - The Next Generation – Agencies must develop programs to recruit and train the Next Generation of Board leadership. This will include more involvement in the programs of the agency, as well as in deeper understanding of the internal operations.
  - Volunteer Development and Management – AJFCA has provided a number of resources to assist agencies to increase their capacity to serve by increasing the number and effectiveness of volunteers.
  - The assessment of mergers and collaborations with other agencies, both within and outside of the Jewish community. AJFCA has been asked to consult with

over half a dozen communities in the past nine months on merger issues, meeting with both member agencies and federations.

AJFCA addresses these concerns in several ways:

- Being immediately responsive to current issues through e-mail alerts, e-newsletters, webinar, and conference call discussions.
- Being a resource through consultative services on discreet local issues. These consultations are conducted both in person in the local communities and via telephone.
- The issues of succession planning, recruitment and retention of new CEOs are addressed by our Recruitment, Retention & Succession Planning Task Force, by our Saltzman Institute for New CEOs; and by presentations at each of our Annual Conferences. AJFCA conducts telephone conferences for CEOs. In addition, we have created a “Recruitment Brochure” for each of our members to use when they talk to people interested in careers in Jewish Family Service. We also have developed a mentoring model for new CEOs to the system, so that agency executives in similarly situated communities can offer practical advice on a one-on-one basis.
- The issue of the changing demographics in the Jewish community is addressed by conference sessions, white papers, task forces, and special educational programs as needed.
- Helping our agencies build their infrastructure in a cost-effective and efficient manner is of particular importance to AJFCA, so we provide a number of resources, including model forms, contracts, and policies in areas such as personnel, marketing, fund development, technology, strategic planning, and board governance. Going forward, these resources, among others, will be housed in a Resource Library on the “Members Only” section of our website.
- AJFCA is devoting significant resources to working with our agencies to improve their capabilities in the areas of outcomes measurement and performance management. This takes the form of individual consultations, access to information on specific data bases, and sharing of resources through webinars, in person presentations, and conference calls.

### **AJFCA AND THE LOCAL FEDERATION AGENDA**

- AJFCA has member agencies in all but one of the Alliance communities. Accordingly, most often, AJFCA is asked to consult on an issue by our local affiliate. There have been times this year when we were asked to consult directly by the Federation on a confidential basis. These consults have been particularly in the areas of personnel and community collaborations and mergers.
- AJFCA is often called upon to consult with local Federations around other areas of specific interest to them, including issues with agency lay and professional leadership as well as with program and priority setting. In addition, we have worked with several Federations as they explored establishing or reinvigorating a Jewish Family Service.
- The challenges of the current economic environment are at the top of every local federation’s agenda. AJFCA has been and is continuing to coordinate an effort to assist communities in addressing the issue of increased demand with diminishing resources.

- On the national scene, AJFCA is very active with JFNA and other national organizations in disaster planning and mitigation, in planning for national priorities, and in discussions concerning the recruitment and retention of early career professionals.

## **PRIORITIZATION AND OUTCOME EVALUATIONS**

*The Alliance has adopted two groups of priorities for 2010-11 that are of equal importance:*

### **A. Organizational Development and Operations**

### **B. Programmatic Foci**

- *Human Services with particular emphasis on aging/older adults and economic vulnerability among Jews;*
- *Israel with particular emphasis on pro-Israel advocacy/education and Israel experience; and*
- *Jewish life and learning with particular emphasis on outreach within the Jewish community to the unaffiliated; formal and experiential Jewish education; strengthening Jewish identity; and engaging the next generation of volunteer leaders.*

## **RESOURCES INVESTED IN EACH PRIORITY**

AJFCA's core mission is encompassed by the first priority above – to Build Capacity and Service Local Agencies. Essentially, everything that we do is devoted to the furtherance of this core mission. Whether we are doing individual consultations to member agencies, sharing information across the network of agencies, or advocating for policies and legislation nationally, all of these activities are intended to assist our agencies to better fulfill their critical roles in their local communities. Accordingly, it is not unreasonable to say that 100% of AJFCA's budget and human resources are directed to programs and services that will assist our member agencies to increase and improve their capacities to meet the needs of their communities in all areas of human services.

At the same time, the Programmatic Priority of Human Services is the key service delivery focus of our agencies and, thus, inextricably intertwined with the organizational elements of capacity building that allow the vital services to be delivered. In each and every one of our communities, the local Jewish Family Service (or similarly named agency) is the primary provider for Basic Human Needs. When AJFCA is providing specific resources on programs with this area, or advocating on legislation or policies involving older adults and economic vulnerability, or advising on specific program design and implementation, these services not only build capacity, but also affect the lives of clients in the individual communities throughout North America. As much as 70% of AJFCA's budget and human resources are directed to this priority area as well.

While AJFCA is beginning its involvement with Israeli partners and human service organizations, and many of our agencies provide specific programming in areas of informal

Jewish education, outreach, Jewish identity, and engaging the next generation of volunteers, typically less than 10% of AJFCA's total resources are directed to these priority areas.

AJFCA's lay leadership, comprised of agency professional executives and lay leaders, are involved in all aspects of AJFCA's work. Each of them participates in task forces and committees which address many of the issues critical to our members. Additionally, AJFCA uses its own network of professionals and lay leaders to lead workshops at the Annual Conference, present on conference calls and webinars, and do individual mentoring and consultations. AJFCA is built on a philosophy that a network of human service agencies can make each individual agency stronger – both as organizations and in the services they provide their clients. The lay leadership of AJFCA is dedicated to this philosophy and directly involved in the programs and services that further it.

## **MAJOR ACTIVITIES THAT ADVANCE EACH PRIORITY**

### A. Organizational Development and Operations

- Board Governance – trainings and resource materials in board leadership training and fiduciary, strategic, and generative responsibilities. An example is the series of conference calls with Board Presidents and Presidents-Elect held in the summer of 2010.
- Strategic Planning Consultations – assisting local agencies in doing strategic planning, including the sharing of resource material and direct facilitation of the strategic planning process, including conducting multi-day planning sessions.
- Legislative Advocacy and Training – through AJFCA's Washington staff, advocacy for specific legislation and policies, work with local agencies on issues particular to them, and training for the network of agencies on principles and tactics of advocacy.
- Volunteer Recruitment and Training- targeted to general or specific populations, like Baby Boomers or teens, AJFCA has conducted Continental discussions on best practices and program models that have achieved success.
- Mergers and Collaborations – increasingly, communities have requested advice from AJFCA on issues of community-wide partnerships that could result in system realignment. AJFCA has actively participated in the negotiations and structuring of agency mergers including the very recent merger of JFS of North Shore, MA into JFCS of Boston, MA.
- Cost savings Initiatives and Responses to Economic Conditions – through articles, conference calls, and workshops, AJFCA has facilitated a sharing of best practices and solutions for its network of agencies. An example of group cost savings AJFCA brought to its member agencies is the securing of an institution wide subscription to the Foundation Center's Foundation Directory Online at a price to our participating members of 30% of the normal cost.
- Access to Funding – AJFCA has increased its attention to assisting local agencies access governmental and foundation funding by publishing resources, providing individual consultations, and providing information regarding fund development in our weekly e-newsletter.

### B. Programmatic Foci—Human Services

- Geriatric Care Management – AJFCA has launched a project to cross-market geriatric care management services on a North American basis.
- Long Term Care Insurance – AJFCA has launched a national sponsorship program to market long term care insurance thereby meeting the community priority to keep aging adults in their own homes in the community for longer periods and to provide a source of reimbursement for our agencies that provide these vital community-based services.
- Economically Vulnerable Populations – AJFCA continues to share best practices in programs that meet basic human needs, including food pantries, financial assistance, career services, and financial literacy, through publication of resources, workshops, and individual consultations. In addition, AJFCA acts as a vehicle for our members to share best practices with one another through the list serves that our agencies access via our website and by facilitating conversation among agencies at our Annual Conference. Published resources, workshops, consultations, list serves and our Annual Conference are always available and widely accessed by all of our members agencies, large, medium or small.

## **OUTCOMES ACHIEVED THROUGH TWO MAJOR ACTIVITIES**

### **1. Annual Conference**

Perhaps AJFCA's signature event is its Annual Conference. In excess of 30 Association lay leaders and professionals are involved in the planning of the conference. Conference planning begins 9-10 months prior to the Conference dates and includes dozens of conference calls and two major in-person meetings over multiple days. The planning process results in an exchange of ideas for conference themes, plenary speakers, and workshop sessions. Workshop presentation proposals are made by member agencies. Typically, three to four proposals are received for the number of sessions during the conference. Most of the presentations at the Conference are made by agency professionals and lay leaders. Additionally, experts and outside professionals are brought in for specific resource sessions and as speakers.

The Conference is intended to be an educational and networking platform for our members' leadership. Frequently, program ideas presented by one agency become the bases for new programs in other agencies across North America. Moreover, the Conference gives AJFCA the opportunity to do specific trainings in areas like board governance and legislative advocacy. An additional goal of the Conference is to connect individuals to the broader network of Jewish social service agencies and issues.

In 2010, the AJFCA Annual Conference attracted over 230 participants each year, representing 75 of AJFCA's member agencies. Information disseminated from the Conference reaches hundreds of additional professionals and lay leaders as conference attendees share their materials with colleagues in their communities when they return home. The program at the 2010 Annual Conference in Los Angeles focused on building organizational, technological and communications capacity within the member agencies and their professional and lay leadership, as well as specific programmatic areas like elder services, special needs programs and basic human needs.

In the post-conference survey, 98% of conference attendees responding gave a favorable rating to the conference speakers and materials. 97% of responders reported that through the Conference, they learned new information and gathered new ideas that would be helpful to their agencies. And in a very positive nod toward the future of AJFCA Annual Conferences, 95% of responders stated that they are likely or very likely to attend another AJFCA Annual Conference.

## **2. Agency Consultations**

A considerable amount of AJFCA staff time is spent in consultation with individual or small groups of agencies on specific and discreet issues. In some cases, these consultations can last up to a year, and in other cases they may be a single session. Many of the consultations are confidential in nature and may be in support of individual CEOs, boards of directors, the agency as a whole, or the broader community.

In the past 12 months, AJFCA has conducted consultations for more than fifteen member agencies, many times with direct participation of the local federation. In some cases, AJFCA has consulted on specific strategic planning processes that have resulted in new strategic plans being adopted by those agencies. Similarly, on five occasions AJFCA has assisted in Executive Searches that have resulted in new hires. For at least ten agencies, AJFCA has consulted on grant applications that were submitted to a funder. In one case, AJFCA's intervention with a major foundation facilitated the merger of two member agencies so that services to the communities will increase and improve.

As part of its strategic planning process to be implemented in the next few months, AJFCA is specifically addressing methods to better formulate metrics to measure outcomes of its activities. Although our members consistently give high marks to AJFCA membership and services, we are seeking to be able to quantify this satisfaction in more objective terms.



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\*Denotes Professional

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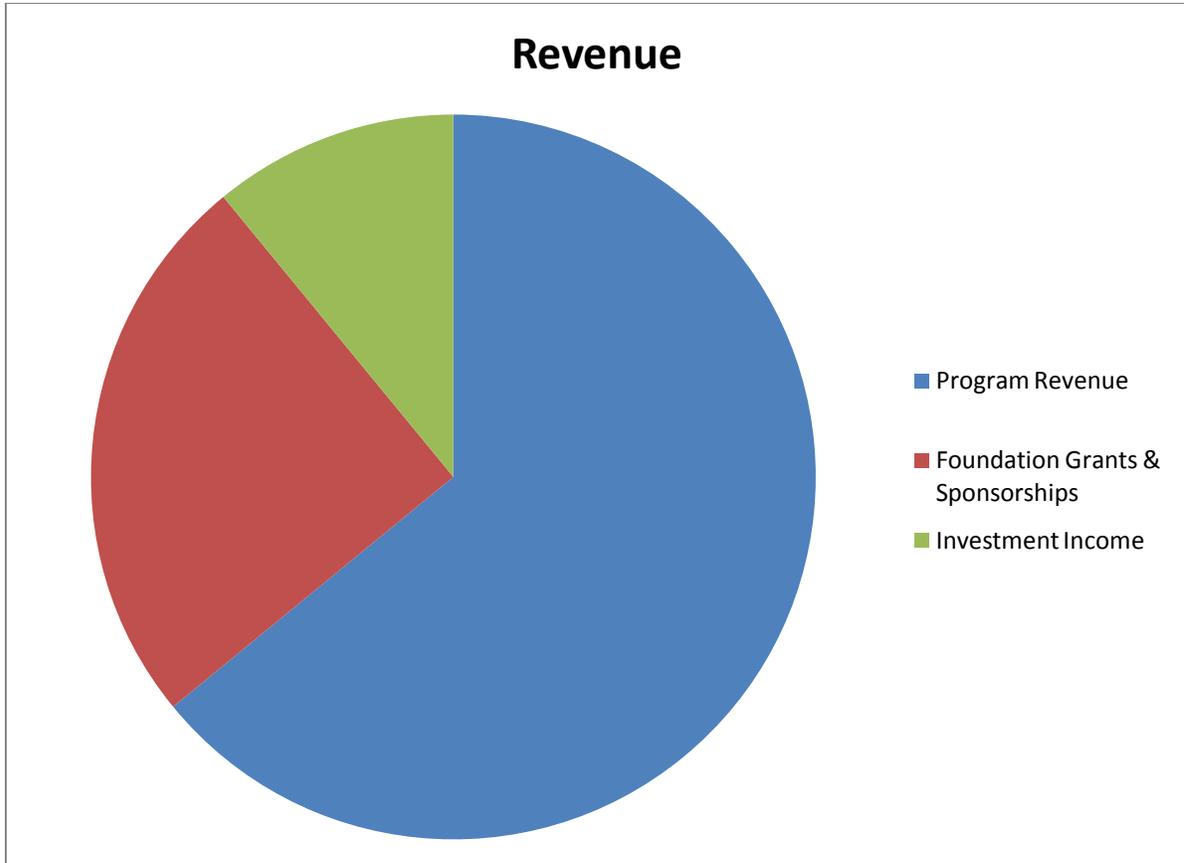
Lawrence M. Abramson	Palm Beach County, FL
Richard K. Blankstein	Boston, MA
Sidney N. Busis, M.D.	Pittsburgh, PA
Helene G. Cohen	San Francisco, CA
Irving F. Cohn (Deceased)	Baltimore, MD
John L. Goldman	Rochester, NY
Jane Goldstein	Louisville, KY0
Jerry Harwood	MetroWest, NJ
Cynthia B. Kane	Wilmington, DE
Ted Marcus	Atlanta, GA
William McKenna (Deceased)	Philadelphia, PA
Bernard B. Nebenzahl	Los Angeles, CA
Oscar Respitz, Q.C.	Montreal, QU, Canada
Annabel L. Sacks	Tidewater, VA
Marc S. Salisch	Northeastern, NY
Lee I. Sherman	Baltimore, MD
Shelton R. Weber	Louisville, KY
George Wolly (Deceased)	Orlando, FL

## Financial Statement

Statement of Activities  
July 1, 2010

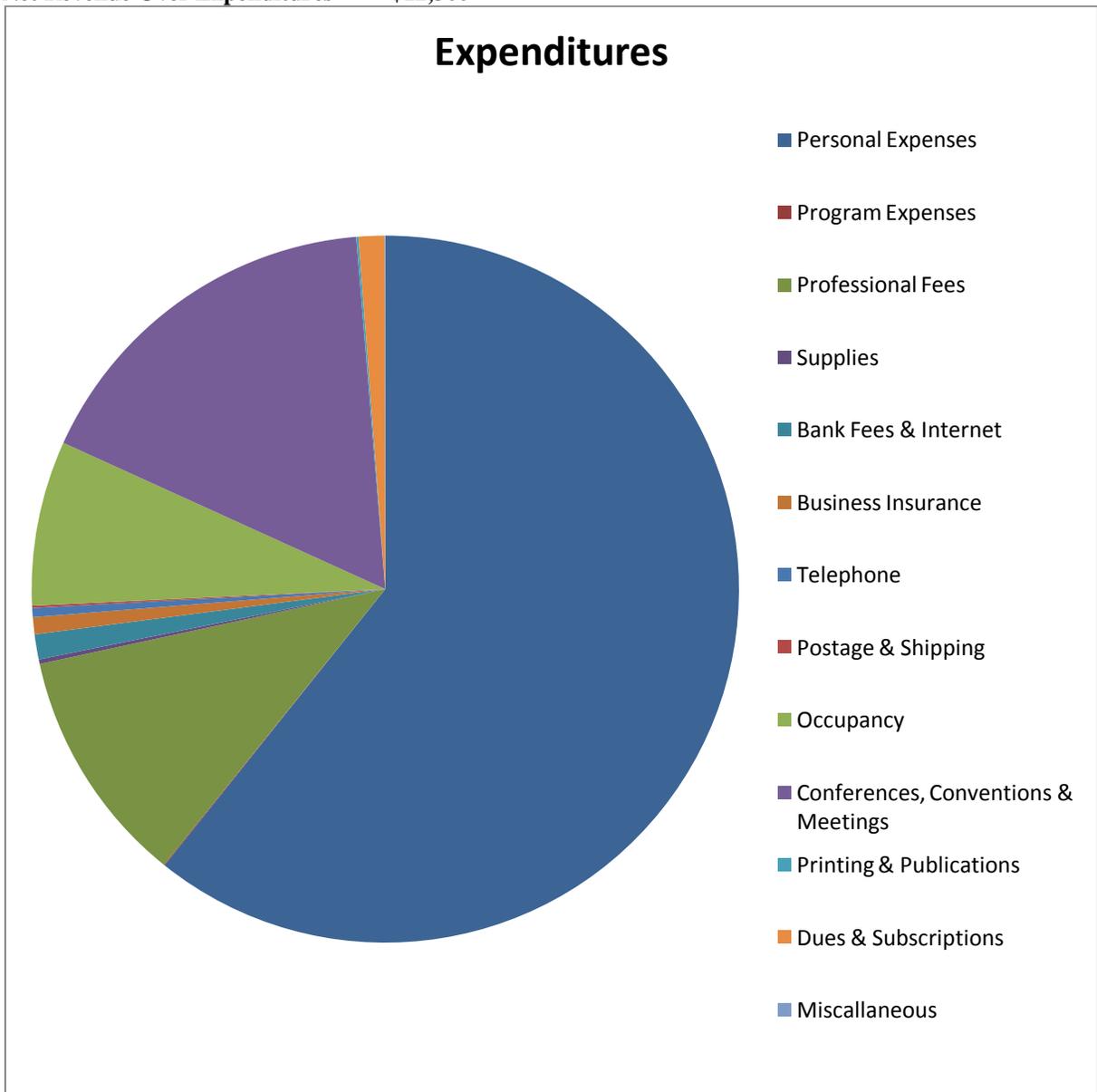
### Revenue

Foundation Grants & Sponsorship	\$13,000
Program Revenue	\$959,650
Investment Income	\$1,500
<b>Total Revenue</b>	<b>\$974,150</b>

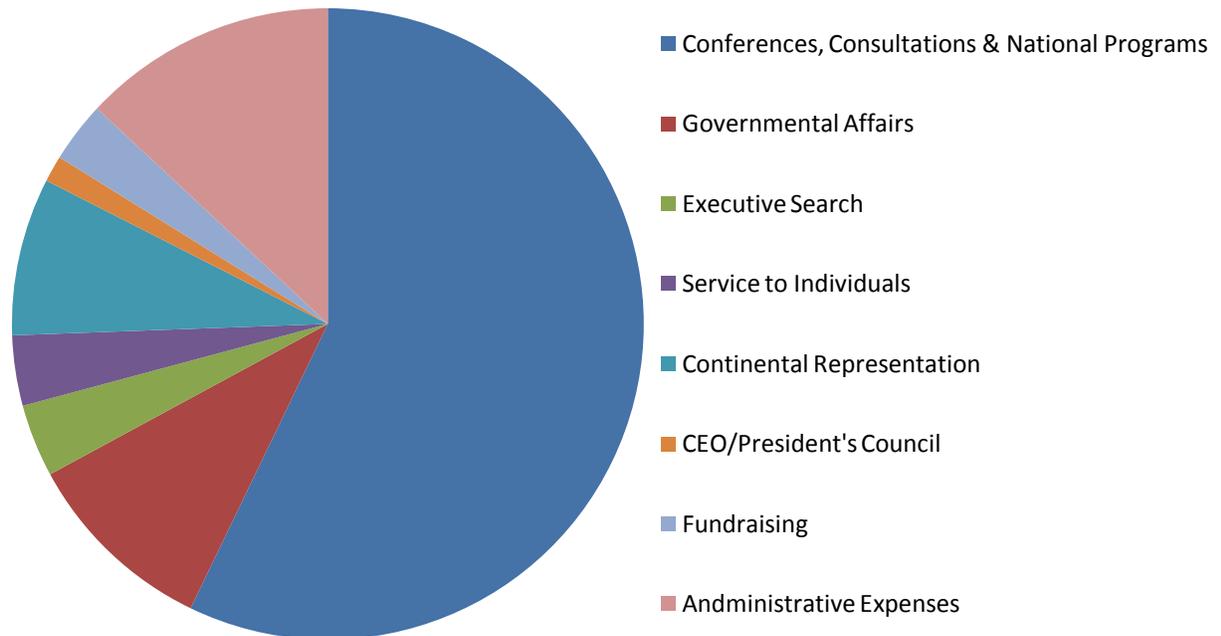


*Expenditures*

Personal Expenses	\$584,100
Program Expenses	\$400
Professional Fees	\$104,200
Supplies	\$2,000
Bank Fees & Interest	\$11,000
Business Insurance	\$7,500
Telephone	\$4,000
Postage & Shipping	\$1,000
Occupancy	\$72,500
Conferences, Conventions & Meetings	\$162,500
Printing & Publications	\$1,000
Dues & Subscriptions	\$11,350
Miscellaneous	\$300
<b>Total Expenditures</b>	<b>\$961,850</b>
<b>Net Revenue Over Expenditures</b>	<b>\$12,300</b>



## Programs



### 2011 Budgeted Expenses by Program Function

\$957,550

Program	2011 Budget	Percentage of Total Budget
Information Gathering	\$186,883	19.5%
Conference & Meetings	\$440,473	46.0%
Governmental Affairs	\$76,604	8.0%
Executive Search	\$28,726	8.0%
Seach to Individuals	\$28,726	3.0%
Continental Representation	\$62,240	6.5%
CEO/President's Council	\$9,575	1.0%
Fundraising	\$23,938	2.5%
Administrative Expenses	\$100,542	10.5%