

JEWISH FAMILY AND CHILDREN'S SERVICES:
An Organization History of its First 157 Years
(1850-2007)

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Introduction

Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (JFCS) is a community-based nonprofit institution that offers a comprehensive array of services to Bay area residents of all faiths and life stages. JFCS is currently the second largest Jewish Family Service Agency in the United States (New York Jewish Family Service Agency is the largest). The roots of the organization can be traced to two agencies meeting the needs of Jewish immigrant families settling in the Bay area during the Gold Rush era; namely the Eureka Benevolent Society (established 1850) and the Pacific Hebrew Orphan Asylum (established 1872) that later became Jewish Family Service Agency and Homewood Terrace, respectively. These two organizations merged in 1977 to become what is known today as Jewish Family and Children's Services.

As the first nonprofit organization established west of the Mississippi, Jewish Family and Children's Services has historically served as a first-responder for Jewish individuals and families in crisis. Over its almost 160 years, JFCS has grown along with the Bay Area community and its network of nonprofit human service agencies. As it expanded its services to communities outside of the city of San Francisco, the organization also developed new programs to meet the changing needs of community members. A unique aspect of JFCS is that the organization frequently assesses the needs of the community and develops new programs to address identified gaps in service. A recent example is the Dream House program, a transitional living program that provides safe and secure housing for women and children who have left domestic violence and abusive situations. The initial program was opened in 1994 to provide shelter, safety and job training. A second location recently opened in 2008.

The JFCS headquarters is located in the Miriam Schultz Grunfeld Professional Building on Post Street in San Francisco. It is part of a complex, including the Rhoda Goldman Plaza assisted living community developed and opened in August of 2000. Jewish Family and Children's Services offers its programming in five major regions: San Francisco, Marin, the Mid/North Peninsula, the South Peninsula, and Sonoma County. Each of these regional offices delivers services in the agency's four core areas: Seniors, Children and Families, Individuals, and Émigrés/New Americans. Although the service areas offered are agency-wide, each site has its own mix of programs and volunteer opportunities.

The agency operates in many locations, including five Parents Place Family Resource Centers in each county served. The Koret Family Resource Center in San Francisco includes Parents Place and the *YouthFirst* Teen Center, including a special focus on Émigré teens. A separate Émigré Services Center is located at a site in the outer sunset on Judah Street which also houses a licensed adult day health care facility for frail older adults called the L'Chaim Wellness Center. At yet another location in San Francisco, the organization operates its social enterprise business, Cleanerific, a social enterprise that creates jobs for the disadvantaged. Jewish Family and Children's Services owns the majority of its buildings in locations after a ten-year building program that developed or renovated twelve facilities for JFCS.

Jewish Family and Children's Services has a current operating budget of \$35 million, with 80% of the budget devoted to personnel related expenses. Fees are the agency's largest source of revenue and bring in approximately 65% of the agency's annual revenue. JFCS services are available to the entire community, and subsidies enable the organization to serve clients who cannot afford to pay for the help they need. JFCS scholarships and subsidies are funded primarily by contributions from the community.

As the second largest revenue source for the organization, individual contributions are raised through a comprehensive development program including an annual campaign, an Endowment campaign including bequest, trusts and other planned gifts, and annual galas. Corporate and foundation grants comprise approximately 15% of the agency's budget along with government funding related to fees for service (e.g., MediCal). Other smaller sources of revenue include donations from the United Way and the Jewish Community Federation and represent less than 2% of the agency's annual revenue. JFCS is currently involved in a major "Family Matters" endowment campaign to raise \$35 million by 2015. The long-term goal is to get to a point where 10-15% of the operating budget is funded by income from the JFCS Endowment Fund., which will provide a financial foundation allowing JFCS to achieve financial stability.

The organization is governed by a thirty-member Board of Directors who work in partnership with the Executive Director, Dr. Anita Friedman. The structure of the Board of Directors includes a variety of committees including: Development, Endowment, Finance, Public Issues, Facilities, Program and Planning, and Personnel. Many of these committees develop subcommittees to address specific issues facing the organization. Board committees meet several times a year and report at monthly board meetings where actions are then taken on committee related matters.

Reaching residents of San Francisco, Marin, Sonoma County and the Peninsula, JFCS delivers services to the following populations: individuals and couples; children, youth, and families; seniors; and new Americans. JFCS currently serves 60,000 individuals, employs a staff of more than 1000, and engages approximately 2000 volunteers in addressing the following mission:

*Jewish Family and Children's Services exists to provide professional and volunteer services for the purposes of developing, restoring, and maintaining the competency of families and individuals of all ages. Traditionally, Jewish Family and Children's agencies carry a special responsibility within the Jewish community for reaching out to children, the aged, the alienated, and the dependent, and for the resettlement and acculturation of refugees and immigrants. As part of the network of Jewish community services, the Agency helps promote Jewish continuity through the provision of preventive, educational, therapeutic, and supportive services, within the context of historic Jewish values, emphasizing inter-generational ties and community responsibility.*¹

Individuals and Couples

The range of services for individuals and couples address a host of life problems and include psychological services, counseling, education, disability services, resource and referral, and support groups. Programs include, but are not limited to psychotherapy, spiritual care centers, bereavement and healing programs, LGBT services, programs for Holocaust Survivors, disabilities programming, and domestic violence assistance.

Children, Youth and Families

JFCS operates diverse and well-respected programs serving children, youth and families. The primary programs include: 1) Parents Place in five counties (a nationally-recognized model Family Resource Center that helps families from infancy to adulthood with classes, workshops, support groups, counseling, child therapy, and assistance with locating childcare), 2) Adoption

¹ JFCS (2008). Agency Mission Statement. Retrieved May 1, 2008 at: http://www.jfcs.org/About_JFCS/JFCS_Mission_Statement.asp.

Connection (a full-service licensed adoption agency that provides domestic and international adoption services, home studies and other services for both adoptive and birth parents), 3) Team Tzadek (community service opportunities for bar/bat mitzvah aged teens to learn more about community needs and gaining first-hand experience about the meaning and role of tzedakah), 4) Family Mediation Center (a resource that families can use to resolve family and marital disputes), and 5) YouthFirst (a youth development program to help youth transition more smoothly into adulthood). JFCS offers many innovative programs addressing issues for all types of families including LGBT Family Services and Interfaith Programs, as well as programs addressing disabilities, early development, food and body image issues, domestic violence, and social service support for Israelis and other non-American born populations.

Seniors

JFCS operates the nationally recognized and award-winning Seniors·At·Home program, which is the most comprehensive provider of at-home care for the elderly in the Bay Area. This program meets the individualized needs of seniors within their own homes. Services include but are not limited to home care, case management, money management, meal delivery, cleaning, counseling, conservatorship, and Palliative and End-Of-Life Care. JFCS also offers seniors a variety of opportunities to remain involved with the community from volunteer opportunities to workshops and events. Incorporated as a nonprofit organization, JFCS founded and is involved in overseeing Rhoda Goldman Plaza, a residential community for older adults. Staff from the Seniors·At·Home program also provide services to those residing at the Plaza as part of a continuum of care created to best serve the Bay area's growing older adult population.

New Americans/Émigré Services

JFCS provides a full range of services to support newcomers to the United States. JFCS's Émigré Program is nationally recognized and provides immigrants and refugees of all ages assistance with citizenship, legal aid, resettlement services, acculturation activities, classes and other support services. The organization has been welcoming refugees for decades, and has resettled over 35,000 individuals fleeing from the Former Soviet Union, Bosnia, Iran, Ethiopia, and other countries where persecution existed². Located in San Francisco, Marin, Sonoma, and the Peninsula, resettlement caseworkers speak a variety of languages to help newcomers make a successful transition by using their native languages.

Reaching all ages, the 79'ers program helps to build community among young adults who emigrated from the former Soviet Union as children. The Émigré Youth Development program is a collaborative effort between Parents Place and Émigré Services and offers a variety of programs including work-study, leadership, community service, and life skills for over 300 participating émigré teens. The L'Chaim Adult Day Health Center offers émigré seniors opportunities to receive bilingual health and rehabilitation services, participate in classes and social activities as well as share a hot luncheon with community members.

Financial Aid/Assistance

JFCS has historically sought to provide services and assist people across the entire economic spectrum. Everyone at some point needs support and assistance, and JFCS's sliding scale makes it possible for all service recipients to receive the same quality of services regardless of ability to pay. In some programs, revenue from clients paying full fee for services generates

² JFCS (2008). Refugee Resettlement Services. Retrieved April 21, 2008 at: http://www.jfcs.org/Services/New_Americans_and_Emigre_Services/Refugee_Resettlement/default.asp

resources for scholarships and sliding scale rates for those unable to pay the full fees. The agency also provides emergency financial assistance for food and housing, scholarships, loans and grants to help offset the expenses of education, special training or business development.

From the Gold Rush to the Holocaust (1850-1950)

In the mid 19th Century, San Francisco attracted thousands of people from all over the United States and Europe seeking the promise of gold and fortune during the Gold Rush. Among those seeking their fortune was August Helbing, a Bavarian Jew who moved from New Orleans to San Francisco in 1849 and opened a successful dry goods business³. Once settled, Helbing noticed that other immigrants who flocked to California to find their fortunes were often poverty stricken, sick and in distress. Combining Jewish tradition with the frontier spirit, Helbing, along with twelve other Jewish men founded the Eureka Benevolent Society in 1850 to relieve the suffering of Jewish immigrants arriving in California⁴. The Society was the first charitable organization west of the Mississippi River. Members of the Society would meet the ships coming into the harbor and bring the sick and weary back to their homes to nurse them back to health and help them adapt to their new surroundings.

In 1858 the Eureka Benevolent Society expanded its services and established its Widows and Orphans fund by charging members an extra 25 cents annually to care for widows and orphans⁵. This fund was initiated as a result of a tragic case in which a Jewish woman died, leaving her baby son with his father, who was killed a short while later on a steamship bound for San Francisco. In 1872, independent of the Eureka Benevolent Society, the Pacific Hebrew

³ Atlman-Ohr, A. (2008). JFCS: nurturing 40,000 in its 150th year. Retrieved April 14, 2008 at: http://www.jewishsf.com/content/2-0/module/displaystory_id/13150/.

⁴ Wikipedia (2008). Eureka Benevolent Society (San Francisco). Retrieved April 11, 2008 at [http://en.wikipedia.org/wiki/Eureka_Benevolent_Society_\(San_Francisco\)](http://en.wikipedia.org/wiki/Eureka_Benevolent_Society_(San_Francisco)).

⁵ Jewish Family and Children's Services(1999). 150 Anniversary Calendar.

Orphan Asylum was established with leadership of Temple Emanu-El⁶. The Asylum provided a place for Jewish orphans and children whose parents could not adequately care for them. The Ladies Sewing Society raised funds to build a three-story orphanage at 600 Divisadero, where the boys were taught vocational skills and the girls learned how to cook and sew. Although separate organizations, the Eureka Benevolent Society and The Pacific Hebrew Orphan Asylum worked collaboratively to meet the needs of the growing Jewish population in San Francisco. In 1896 Helbing, the president of Eureka Benevolent Society, died and left behind an organization that had grown to 1000 members and was dispensing \$200,000 annually to assist Jews in need⁷.

Between 1896 and 1905 six thousand Russian Jews settled in the Bay Area with help from the Eureka Benevolent Society⁸. The earthquake and subsequent fires of 1906 destroyed the Society's San Francisco office building; however, members continued to help those who had lost their homes and livelihoods. The Pacific Hebrew Orphan Asylum provided a safe place for children displaced by the fires. The Asylum and the Society worked together to provide support for both children and families. The Federation of Jewish Charities was chartered in 1910 to organize and centralize fundraising for Jewish and general community causes by helping Jewish-sponsored agencies provide shelter, employment training, food, clothing, and healthcare⁹. World War I and the Russian Revolution triggered a new wave of Jewish immigration between 1914 and 1918. The Eureka Benevolent Society provided support to help these newcomers adjust and settle into their new surroundings.

⁶ Atlman-Ohr, A. (2008). JFCS: nurturing 40,000 in its 150th year. Retrieved April 14, 2008 at: http://www.jewishsf.com/content/2-0/module/displaystory_id/13150/.

⁷ Jewish Family and Children's Services(1999). 150 Anniversary Calendar.

⁸ Atlman-Ohr, A. (2008). JFCS: nurturing 40,000 in its 150th year. Retrieved April 14, 2008 at: http://www.jewishsf.com/content/2-0/module/displaystory_id/13150/.

⁹ Encyclopedia of San Francisco (2008). Jewish Community 1900-1950. Retrieved April 22, 2008 at: <http://www.sfhistoricalencyclopedia.com/articles/j/jews2.htm>

The 1920s witnessed major changes in both the Asylum and the Society. In 1921 the Pacific Hebrew Orphan Asylum moved to San Francisco's Ingleside District and changed its name to Homewood Terrace, reflecting a move away from the orphanages of the past to a more community-oriented child care agency¹⁰. This was a pioneering change as Homewood Terrace became the first cottage-type childcare campus in the United States and provided its 125 residents with a commissary, gymnasium, synagogue and hospital¹¹. In 1929, in the early beginnings of the Great Depression, the Eureka Benevolent Society changed its name to Jewish Family Service Agency and expanded its services to not only help people weather tough economic times, but also to offer modern services such as counseling and education.

Jewish Family Service Agency continued to expand their services in the 1930s to meet the growing needs resulting from the Depression and new challenges in resettling refugees fleeing the impending Holocaust. Services were primarily funded through money received from the Community Chest, the Jewish Welfare Federation, the Jewish National Welfare Fund, and private donations. In 1931 JFSA moved to a newly built office complex on Scott Street in San Francisco. In the years leading up to and during the Second World War, JFSA was largely involved in providing support for local residents and helping to resettle refugees. Local residents required additional support during wartime, particularly the wives of soldiers fighting or killed abroad who could no longer care for their children or required additional support in doing so. The organization, along with Homewood Terrace and the Jewish Welfare Federation, was also involved with placing Jewish children who were displaced by the war in foster homes.

¹⁰ Homewood Terrace (1922). The Evolution of a Congregate Institution into a Group of Homes for Children.

¹¹ Jewish Family and Children's Services(1999). 150 Anniversary Calendar.

Jewish Family Service Agency continued to help new Americans adjust and settle. In 1940 the agency's annual budget was \$86,700 and they served approximately 900 people¹². In 1943 the organization developed its first money generating enterprise when it established the Utility Workshop, which was a job creation program for refugees and elderly immigrants having trouble finding work¹³. The workshop program consisted of jobs related to folding, packing and sorting materials, addressing labels, and simple manufacturing. The Utility Workshop was one of the first nationally to be founded by a Jewish community and was the forerunner of the 16 similar workshops established since 1950.

The Post World War II Era (1950s and 1960s)

The San Francisco Jewish community underwent major expansion, recovery and development in the two decades following the Second World War. Jewish agencies such as Jewish Family Service Agency, the Bureau of Jewish Education, and the Hebrew Free Loan Association grew and developed programs to meet the continuing stream of immigrants and American-born Jews who were moving to San Francisco after the war¹⁴. This was also a period marked by explosive growth of philanthropy within the Jewish community. Agencies serving the Jewish community and new émigrés, such as Jewish Family Service Agency, were supported by thousands of contributors who donated money to the Jewish Welfare Federation campaign as well as gave directly to various organizations¹⁵. San Francisco residents and former immigrants who had earned considerable wealth also began to establish family foundations and charities to

¹² JFCS (1940). Board of Directors Regular Monthly Meeting June 25, 1940.

¹³ Jewish Family and Children's Services(1999). 150 Anniversary Calendar.

¹⁴ Encyclopedia of San Francisco (2008). Jewish Community: 1950 – Present. Retrieved April 22, 2008 at: <http://www.sfhistoryencyclopedia.com/articles/j/jews3.htm>

¹⁵ Encyclopedia of San Francisco (2008). Jewish Community: 1950 – Present. Retrieved April 22, 2008 at: <http://www.sfhistoryencyclopedia.com/articles/j/jews3.htm>

address social welfare needs of the community. For example, in 1953 the Evelyn and Walter Haas, Jr. Fund was established to provide support for the Jewish community as well as the City and County of San Francisco. JFSA services continued to be funded through Federation grants, local awards, philanthropy, and earned income. For several years during the 1950s, the sheltered workshop generated revenues to support its source programs.

From 1929-1958, Hyman Kaplan was the Executive Director of the Jewish Family Service Agency until he was replaced by Dr. David Crystal. During the 1950's Jewish Family Service Agency was involved in offering resettlement services to Hungarian and German émigrés and also delivered counseling and psychiatric services to adults. This reflected not only what was popular in the field of social services, but also the perspectives of David Crystal, DSW, the Executive Director of Jewish Family Service Agency of San Francisco at the time. Dr. Crystal felt that the contemporary family service agency should provide basic mental health resources to help people cope with social adjustment and psychological issues associated with an ever-changing society¹⁶. During the 1950's the agency grew very little and focused primarily on providing psychotherapy to adults. At the time, the agency delivered few services to the elderly and even fewer to children and families.

The 1960s was a time of expansion, new opportunities, and an organizational self-examination in relationship to the needs of the community. In 1959 David Crystal sent a memo to the Board of Directors calling for increased attention to the growing need of the Jewish elderly living in the community. The memo acknowledged that the agency needed to identify the concrete needs of this population and develop ways to help them maintain their independence in the community. Dr. Crystal suggested that the organization consider developing a series of programming efforts, such as a homemaker service, that could operate within the existing agency

¹⁶ Crystal, D. (1966). The family service agency as a mental health resource. *Social Casework*

structure and provide flexible services in accordance with client needs, a boarding or foster care program for the elderly, and a residential facility¹⁷. Conversations about how to address the needs of the elderly continued throughout the 1960s, with a Committee on the Aged being formed in 1969.

The 1960s also brought an interest in exploring new opportunities and partnerships with other local and international organizations. For example, in 1960 Jewish Family Service Agency entered into a tri-partnership cooperative venture with the University of California's School of Social Welfare and the Institute of International Education to develop the Hyman Kaplan Memorial Fellowship. The Fulbright Committee selected an Israeli student for tuition-free graduate study in the School of Social Welfare while Jewish Family Service Agency provided field work training and supervision. Despite a breakdown of the collaboration in 1967, JFSA continued to sponsor the Hyman Kaplan Fellowship Program for several years.

The Utility Workshop continued to provide employment for new émigrés during this period. JFSA collaborated with numerous local businesses (such as the California Ink Company and India Imports of San Francisco) to generate projects for workshop clients. Although the Utility Workshop offered paid work opportunities, health insurance and community integration for new Americans, it began to experience financial hardships in the early 1960s. In 1961 David Crystal wrote the Jewish Welfare Federation and requested special consideration of the workshop being in financial crisis. The Federation provided intervention funds so that the workshop could cover its operating budget; however, a committee was established to evaluate the value of the Utility Workshop. The findings of the evaluation indicated that the workshop offered immense psychological benefits for its elderly and disabled workers by engaging them in productive work activity for pay. Several recommendations were made to alleviate the fiscal

¹⁷ David Crystal (1959). Memo to the Board. JFCS.

deficits, such as transferring bookkeeping responsibilities to JFSA, developing a volunteer committee to administer the workshop rather than paid employees, changing the workshop from a long-term employment program to a transitional program, and continuing to apply for Federation subvention to meet operating expenses. Concerns about the workshop resulted in subsequent program evaluations throughout the 1960s.

In 1966 the Jewish Family Service Agency expanded its service delivery geography when it opened its first branch office to serve the growing Jewish community in the Peninsula. This decision reflected findings from the Jewish Welfare Federation Committee's Study for the Need for Family Services in the Peninsula and Marin indicating a lack of social service resources for the growing Peninsula community¹⁸. This office was initially a two-year pilot project that was supported by the Jewish Welfare Federation. In 1966 the Board of Directors also responded to staff shortages at JFSA, salary recommendations issued by the Family Service Association of America and voted to increase salaries for professional and clerical staff in 1967.

Although the organization's services focused on the delivery of mental health care for adults, the latter years of the 1960s were a time in which the Board and the Executive Director considered options for service expansion and experimented with several pilot projects. As part of its reaccreditation process with the Family Service Association of America, the agency underwent a self-study conducted by an outside consultant. The recommendations from this study, such as becoming more involved in other programming areas and expanding on a more non-sectarian basis, as well as the future direction of the organization were topics that the Board grappled with in their monthly meetings.

Jewish Family Service Agency began to offer some of its clinical services to other organizations serving the Jewish population. In 1967, caseworkers began to provide consultation

¹⁸ JFSA (1966). Board meeting minutes from Thursday March, 24, 1966.

on adjustment problems of children within the nursery school at the Jewish Community Center. They also piloted a program in which two Jewish Family Service Agency caseworkers offered a group-counseling program with the parents of the nursery school children. Furthermore, the agency explored the development of collaborative counseling services with local synagogues and other organizations. These pilots gave the agency an opportunity to share their clinical expertise and training with other agencies and to reach out to support the growing population.

Board members began to become active in advocacy efforts and sent letters endorsing numerous pieces of legislation, such as Assembly Bill 1420, that sought to legalize abortion in the state of California. They also took political stands in relation to California's mental health budget cuts and amendments to the Social Service Act. The Board considered local community problems as well, such as those being spawned, "in the Haight-Asbury District – among the "hippies" – and the alleged high proportion of Jewish young people in this group"¹⁹. The organization collaborated with other local agencies, such as Catholic Social Services and the San Francisco Family Service Agency, to discuss the "hippie problem" and its implications. Jewish Family Service Agency initiated a six-month pilot project to employ a street-level caseworker to assess the scope of how the movement was affecting Jewish youth and why Jewish youth became so involved with this movement. This pilot resulted in a Youth Conference that was held in March of 1968.

Throughout the latter half of the 1960s, the agency faced fiscal problems related to reductions in Federation and Community Chest support to Jewish Family Service Agencies across the country. Additional declines in economic assistance grants reflected changes in government social welfare administration. The budget cuts came at a time of increased service need and operating expenses. These financial woes initiated conversations about how to

¹⁹ JFSA (1967). Board Meeting Minutes for April 27, 1967.

supplement the organization's income through contracts with the San Francisco City and County Department of Social Services, generating more private pay fee-based income, fundraising, and making programming reductions to prevent deficits.

Service Expansion (1970 – 1976)

The early 1970s continued to be an era of exploration and expansion for Jewish Family Service Agency. The long relationship with Homewood Terrace to provide services for orphans or children needing temporary out-of-home care had been separate from the services for Jewish adults and children in the larger community. This was not out of the ordinary, as most large cities in the United States had historically established both a Jewish Family Service Agency and a Jewish Foster Care Agency for children.

In the 1960s and 1970s many cities began to consolidate children and adult services. In 1970 David Crystal and the then-Board President Theodore Seton were invited to participate in a Jewish Community Federation study of Homewood Terrace related to Jewish children needing placement. In this context, there were discussions about consolidating services to children and families as well as the possibility of merging JFSA and Homewood Terrace. While these conversations were unfolding, Jewish Family Service Agency continued to develop its children's mental health services and expanded its consultation counseling services to congregations and other organizations, such as the Brandeis Hillel Day School. This expansion led to the development of a new position of Associate Director, which was filled in 1971.

With the reduction of Jewish Welfare Federation funding along with cuts in state and local funding, it became clear that the Board of Directors needed to be more involved in the financial oversight of the organization. In 1971, Ron Kaufman was elected Board President and

stressed the need to find funding sources other than the Jewish Welfare Federation if the organization was going to implement new program ideas. The agency began to more aggressively pursue foundation funding and individual philanthropic donations.

Despite the funding concerns, JFSA continued its efforts to expand its services in 1972 by opening a branch office in Marin, a youth outreach program in the Peninsula, its child guidance services to nursery schools and Brandeis Hillel Day School, child psychologist services to provide psycho-diagnostic testing, and a Widow and Widower Program to provide healing and bereavement support. The Jewish Women's Volunteer Corps was launched in 1973 to provide services to Jewish aged living in the community along with a federally funded Kosher Nutrition Project that provided hot kosher lunches for Jewish elderly through JFSA.

In 1974 the JFSA Child Guidance Program expanded to include child therapy, consultation to teachers, and group counseling for parents. The agency also began to develop services for older children, initiating an outreach program for high school students at two temples in the Peninsula. In addition to individual and group therapy for young adults, married couples and singles, services to the elderly were also greatly expanded at this time including volunteers and paid staff providing counseling, case management services, and home visits to those confined to their homes or facilities.

By the end of 1974 there was a growing awareness of the Soviet Émigré situation. For years the United States Government had been providing limited funds to enable organizations to help support resettlement efforts; however, the support was scheduled to be significantly reduced in 1974. At this time, the JFSA Émigré Resettlement Program was comprised of four Russian speaking volunteer case aids and one part-time Russian speaking worker who assisted the sole caseworker assigned to the program. The Board requested a review of the current resettlement

program and acknowledged that they would likely need to plan to resettle twice as many refugees with less financial support. In addition, as awareness was growing about the Soviet émigré situation, Jewish Family Service Agency was also helping to resettle Vietnamese and Cambodian refugees from Camp Pendleton and Fort Chaffee, at the request of the US Department of State after the war in Viet Nam.

During 1975 and 1976 the agency increased the number of Soviet émigrés that they were serving. During the first four months of 1976, the agency had received referrals of 61 Soviet refugees from the USSR, representing three times as many as for the same period in 1975. An Inter-Agency Committee was formed to strengthen and improve services to émigrés. The agency was beginning to feel fiscal pressures as funds were not sufficient to provide increased allocations for resettlement and other programming.

While discussion continued during 1975 and 1976 with representatives from Homewood Terrace about mutual program planning, collaborative efforts were still difficult due to tensions surrounding the proposal to combine programs. In late 1976, it was determined that less than half of the children served by Homewood Terrace were Jewish, suggesting a shrinking demand for out-of-home placements for Jewish children and a growing interest in foster care, group homes, and community-based care designed to keep children at home with their families and to provide the out-patient, family-focused service related to do so. Out-patient care was seen as more effective and less costly than residential placement.

Merger and Soviet Émigré Resettlement (1977-1979)

Merger

After years of negotiations, a merger between Homewood Terrace and Jewish Family Service Agency was completed on November 1, 1977. The purpose of the merger was to provide more comprehensive services to the Jewish community and to meet the needs of a changing society. The merger was a mutual decision between the Board of Directors of both Homewood Terrace and the Jewish Family Service Agency. The merger planning process took more than a year, as an audit of both organizations was conducted and legal and programmatic decisions needed to be made. To reflect the inclusion of children's services, the merged agency legally changed its name to Jewish Family and Children's Services. The Merger Committee decided that the Boards of Directors for both organizations would merge to form a 25 member JFCS Board of Directors and that the first Executive Director of the new agency would be Dr. David Crystal with the Associate Director being Arthur Goldberg, Executive Director of Homewood Terrace. Ultimately, a different decision was made to seek new Executive and Associate Directors for the merged organization. Dr. Crystal agreed to hold the position of Executive Director throughout the search while Mr. Goldberg left the organization. Dr. Crystal's tenure ended on June 30, 1979, when he was replaced by Werner Gottleib following a national search.

Homewood Terrace was a larger organization and had more assets, including properties. The merger was not reflected in the 1977 or 1978 budget; however, the June 1979 budget reflected the combined fund balances of both entities, which increased JFCS revenues from \$1,698,844 in 1978 to \$2,188, 535 in 1979²⁰. The Merger Committee decided to close intake of

²⁰ JFCS (1979). Statement of Support, Revenue, and expenses and Changes in Fund Balances for the Year Ended June 30, 1979.

new cases to the group homes July 1, 1977 and adhere to a gradual phasing out of the group home program so that staff would have appropriate time to plan for the needs of the residents.

The merger process was a difficult one for the staff employed at Homewood Terrace and the Jewish Family Service Agency given the uncertainty about how the change would affect jobs, agency programming, and the children residing at Homewood Terrace. While employees at both agencies were informed that no changes to staffing or programming would occur during the first year of the merger, there was much celebration of the coming together of the two oldest agencies serving the San Francisco Jewish community, the Eureka Benevolent Society and the Pacific Hebrew Orphan Asylum.

With the merger came a need for Jewish Family and Children's Services to expand, especially into community-based services for children and families. The Board approved funds to expand the Marin office to include services for children and the opening of a branch office in Palo Alto. During this period the Soviet Jewish Émigré Resettlement program continued to expand and by the end of 1977, the agency had received 133 Russian émigrés (exceeding the quota by one-third and continuing to increase the program's deficit). The agency also continued to expand its services to the aged through additional volunteer groups assigned to visit and assist the elderly in the community.

In 1978, JFCS board members began to engage in a dialogue about whether to continue the group homes inherited from Homewood Terrace or to close the program entirely. Both the children and the staff overseeing Homewood Terrace were anxious about an uncertain future. These discussions were reflective of larger conversations occurring in the child welfare community about how to best serve children in need of psychiatric care. By the end of 1978 the Board had voted to reopen intake for two long-term residential treatment homes and begin

selling the Homewood Terrace group home properties that were unsuitable for residential programming.

The agency continued to build and expand its children's service programming in 1979. The Governor's proposed state budget cuts for the foster care of children posed some concerns for the group home program, therefore the Board wrote individual letters to the Governor opposing the cuts. The agency also initiated a Joint Custody Resource Study funded by the San Francisco Foundation to determine how joint custody arrangements affect children and to inform the legal and parental service fields of how to make best-practices custody decisions regarding children.

During this merger period the flow of émigrés arriving in San Francisco increased and by 1978 the agency received 234 émigrés, having planned for 150. In 1979 the agency was told to plan for a minimum of 500 émigrés, which would be partially covered by a grant from the federal government. By the summer of 1979, the agency received a request to increase the number of people that they were resettling to 650 individuals for the year. Given the aftermath of the war in Viet Nam, the agency was also asked by the State Department through the International Hebrew Immigrant Aid Society (HIAS) to initiate a program to resettle Southeast Asian refugees. JFCS agreed to hire staff who were multi-lingual specifically to staff the JFCS Southeast Asian Refugee Resettlement program.

Immigrant Jews from the Soviet Union were reaching historic levels during this period, and increasing numbers of individuals and families were arriving in the San Francisco area. In January 1979, Dr. Anita Friedman was recruited and appointed to the new position of Coordinator of Émigré Services for the San Francisco Jewish Community. The Émigré Program consisted of one and one-fifth professional workers and one clerical person in early 1979. By the

end of 1979, the JFCS Émigré Department had grown to eight professional staff members and two clerical workers. Not only was Dr. Friedman hired as the Coordinator of Émigré Services for JFCS, but she was also appointed as Director of the Resettlement Program overseeing all Jewish Welfare Federation Agencies in the San Francisco Bay Area.

When expanding the Émigré Services at JFCS, Dr. Friedman sought to hire staff who could speak fluent Russian, had cross-cultural knowledge and background, and were smart and motivated. On the job training was provided by JFCS. The influx of large numbers of Russian émigrés was a bit of a “culture shock” for the organization and the community because no one knew what to expect from these new clients who were different from past émigrés that arrived before and after World War II from Poland and Germany (personal communication, Gayle Zahler, April 1, 2008).

Consolidation and Expansion (1980-1985)

The first half of the 1980s was a time for the JFCS institution to re-group under new leadership and continue the consolidation of programs and policies with Homewood Terrace. In 1980 the Executive Director introduced a new organizational chart that delegated specific agency responsibilities to Department Directors, who were accountable to Mr. Gottlieb. Three Department Directors now formed an Executive Committee to oversee programs, policy, and the administration included fifty-five full-time and thirty-four part-time employees.

As Jewish Welfare Federation funding continued to decrease, JFCS began to apply for more foundation grants to help cover service expenses. Board members began to recognize the future need for new sources of revenue and formed a Long Range Financing Committee. A variety of new revenue sources were developed to initiate programs in order to meet community

needs. In mid 1980, the agency secured philanthropic funding for the first three years of a new family resource center called Parents Place that included new services such as a new parent education program, and a telephone consultation program for the parents of pre-school children called the “Warm Line”. The agency purchased its first property, a Victorian building on California Street to house the new Parents Place.

In 1981 the agency decided to seek accreditation with the Council on Accreditation for Services to Family and Children, Incorporated, which they received in December 1982. In an effort led by then Assistant Director, Dr. Friedman, accreditation provided the organization with an improved system for quality control as well as offering a national status. During this period, diversification of funding continued; JFCS continued to submit grant proposals to local foundations and also instituted a new agency fee policy.

In 1981 the organization continued to feel pressure from increasing government, United Way, and Federation budget cuts. The Board of Directors discussed several solutions including staff reductions and program eliminations. Agency staff submitted a number of foundation proposals to supplement program costs and board members were encouraged to attend a seminar on fund-development hosted by the California Services to Children. The Board also began to develop and implement agency policies and procedures related to intake and referral as well as fee policies designed to increase fee income by approximately 20%.

Bernard Werth joined the Board in 1981. Mr. Werth had a professional background in accounting and immediately began to study JFCS’ financial situation, proposing a series of changes. As Mr. Werth recalled, the leadership of the agency did not have extensive experience with finance or operating financial systems (personal communication, Bernard Werth, April 10, 2008). Mr. Werth was involved in several early decisions such as the computerization of

financial reports given the newly emerging computer technology, presenting monthly financial reports to the Board, and formally establishing the JFCS Endowment Fund.

In light of increasing financial stressors, the JFCS Board launched a Development Committee in 1982 consisting of both board and non-board members to develop long range financing strategies. A system for development and fundraising was created to solicit donations. Later in the year, as part of their long range strategy for JFCS sustainability, the Board developed a marketing and public relations program and hired their first part-time Publicity Coordinator. Dr. Friedman was officially appointed Assistant Executive Director on July 1, 1982 and became responsible for agency-wide program supervision and staff development while also maintaining her position as Director of the Émigré Program with Bay Area-wide responsibility.

Bernard Werth became Board Treasurer in 1982 and continued to develop and streamline the financial systems of the agency. According to Mr. Werth, the Board was “detached” from the fiscal life of the organization and he worked to develop a system of budgeting, assure that the agency had the proper insurance coverage, assure that the agency’s investments were being managed properly, and educate the Board became to execute fiscal oversight of the agency (personal communication, Bernard Werth, April 10, 2008). During this time, the Board authorized expenditures to also develop a Computerized Management Information System (MIS) to provide information on programming, outcome and effectiveness. The first computerized MIS system was fully operational in January 1983. This was an extremely beneficial and forward-thinking decision. The Finance Committee also established semi-annual meetings with investment counselors to help the Board set goals for revenues and budget.

In June of 1982 the new Parents Place opened as one of first family resource centers in the nation and the first of its kind in San Francisco. Parents Place was a new model for

supporting families that offered a warm and welcoming facility for new parents and their children to interact with other new parents and receive comprehensive services. The program was innovative and the first in the nation such that the National Association of Social Workers published a special article on Parents Place in its Spring 1982 “NASW Practice Digest.”

Also in 1982, the Homewood Terrace Child Welfare League Study noted the movement away from residential care and towards a more family-centered approach. These changes initiated an internal needs assessment in the Jewish community concerning adoptions, foster care, and family day care. Using funds from the Koret Foundation, the agency initiated a pilot program on adoption starting with support groups for post-adoptive parents, as well as conducting a foster-care needs assessment.

In 1983, Dr. Friedman, as Assistant Executive Director, approached the Board to discuss the need for strategic planning and a fresh look at the environmental context in which JFCS work took place. She addressed the newly instituted philosophy of “Reaganomics”, the US economic crisis, and the shift of responsibility for human services to the private sector, including key private institutions such as Jewish Family and Children’s Services. Dr. Friedman stressed to the Board the growing relevance of the agency’s services in a changing society and the projected needs of the community. This marks the beginning of the Board’s conversations about achieving financial stability and self-sufficiency as a new business model for social service providers. In September 1983, the Board was introduced to two new staff positions: a professional Agency Development Coordinator and a Controller. In November 1983, the agency hosted its first modern fundraising event called “Friends of JF&CS”, raising approximately \$61,000.

New pilot programs and initiatives were also under consideration at this time. A fee-based Board-and-Care facility for elderly adults was initiated in the Peninsula to test the need for

assisted living for the elderly and financial viability. A proposal for an Adoption Services Program was also made in early 1983. When the Soviet Union closed the door on immigration in 1983, the agency experienced a temporary reduction in émigré intakes. Gayle Zahler was offered the opportunity to conduct a community needs assessment and discovered an unmet need for building families through adoption services in the Jewish community. This was a transition time in the field of adoptions as the movement towards open adoptions was just beginning. Birth moms were now seeking out lawyers rather than adoption agencies so that they would have information about the adoptive parents and make their own choice about who would raise their babies. Lawyers were ill equipped to handle the psychological processes of pre and post adoption services, and the agency saw this as an opportunity to provide support groups and placement services for families seeking adoption. The Board approved the concept of the Adoptions Program and gave approval to staff to begin seeking funding.

In the end of 1983, as part of a national shift in the role of central funding, institutions like the United Way and the Jewish Community Federation (the organization changed its name from the Jewish Welfare Federation to the Jewish Community Federation to signal a change in priorities away from service welfare to community building in the early 1980's), the Board President and Executive Director began a series of conversations with the Jewish Community Federation to re-examine the funding relationship between the two organizations. JFCS reported that, despite their growing caseloads, they had been turning people away and have made a list of potential program cuts as a result of inadequate Federation funding for social services. The Board sought to involve the Federation in becoming more aware and responsive to the social service needs of the local Jewish Community. The agency expressed concern not only for their programs, but for the Northern California Jewish Community as a whole. Board members

agreed that education on this matter was key, and a series of articles about the funding needs was published in the Jewish Bulletin.

As a result of financial cuts, the Board also looked more closely at its program priorities and came to the conclusion that the Homeward Terrace Program also served a large non-Jewish population. Given insufficient resources to serve the entire community, the Board felt that it was important to take a closer look at this program within the context of the needs of the Jewish Community and formed a Committee on Children's Services. The Board also approved a new fee policy statement for Senior Services, which had previously been provided at no fee. In 1984 the Board also initiated and/or raised fees for other services based on the ability of clients to pay.

In early 1984, the Committee on Children's Services examined the agency's residential program and presented their recommendations to phase out the Homewood Terrace program, with the closure of the first house being no later than September 1, 1984. This decision did not come lightly and agency leaders had to convince others in the community about the reasons for the decision. Community providers were uneasy about the decision and concerned about where the children would go. Despite this reaction, JFCS continued to develop a phase out of the residential program over a two-year period. The residential staff prepared long-term clinical plans for each resident to ensure the maximum stability of the child. The Residential Program Phase-Out plan that was approved by the board called for the closing of the first residence in September 1984 and the fourth by July 1, 1986.

Although the staff members working at Homewood Terrace were committed to ensuring as much stability as possible for the children who were living in the homes at the time, they were upset. The staff drafted a letter to the Board of Directors in April of 1984 and representatives of their Local 535 SEIU union to express their concern about what would happen to the children if

the residential program was closed. The staff were reminded that the Board of Homewood Terrace in 1979 had decided to close the residential program and develop more community-based programs and that Jewish Family and Children's Services had decided to reinstate the residential program on a trial basis after the merger. During the spring and summer of 1984 the Facilities Committee worked on how the agency could best handle the properties vacated by the Homewood Terrace residents. Each of the four properties was assessed for either rental or sale. In October of 1984 the first of the four properties were sold.

In addition to the decision to close Homewood Terrace, other developments were happening in the agency. In 1984 the agency made revisions to its mission statement and hired a consultant to work with agency leadership to develop a detailed fund development. At that time, the Jewish Community Federation Bylaws required that beneficiary agencies that received their funds not engage in fundraising activities (as a condition for funding) without first submitting their fundraising plan for approval. The JFCS Board sought to modify their fundraising plan to conform to the Federation's restrictions.

The initial fundraising plans involved donor solicitation. The Agency Development Committee created a new agency brochure, developed a solicitation letter, and retrieved a list of 1000 names provided by board members. In the summer of 1984, the agency instituted its Annual Friends membership campaign and by the end of the end of November they had raised a total of \$54,581 through bulk mailings and tear-off coupons in the Jewish Bulletin. The agency also scheduled a special event fundraiser for May 5, 1985.

Another major change that occurred in 1984 involved the decision to seek a new Executive Director when the Board decided to replace Werner Gottlieb. The Board agreed that

Mr. Gottlieb did not have the leadership or management skills that the agency needed during its time of crisis and transition, and a negotiated separation was smoothly achieved.

As Assistant Executive Director, Dr. Friedman was asked by the Board to serve as the Interim Executive Director while the Board decided how to conduct a search. The agency also hired a new Controller to develop and implement an effective system of budgetary controls. A Selection Committee was established to select a new Executive Director in January, 1985 and appointed Dr. Friedman to the Executive Director position at the end of January.

A New Leader and a New Strategic Plan (1985)

Dr. Friedman was announced as the new Executive Director of Jewish Family and Children's Services on January 24, 1985 and made a series of staff changes (promoting Amy Rassen from Parents Place Director to Assistant Executive Director and Gayle Zahler to Supervisor of the Émigré Program). It was a time of enormous change as Dr. Friedman had a very different vision for the organization than her two predecessors; namely envisioning JFCS as a full-service "problem solving" organization where people of all ages and income levels could go for high quality help with their life's challenges. In 1985, when Dr. Friedman was appointed to Executive Director the agency was serving over 11,000 individuals²¹ and had a budget of approximately three million dollars²².

Dr. Friedman recalls that Jewish Family and Children's Services was struggling financially, had a long wait list for services, did not have the resources to adequately compensate or recruit top professionals or needed items such as computers. Morale with the staff was very low. She acknowledges that this created an opportunity for her and the organization to learn and

²¹ JFCS (1985). Board of Directors Meeting Minutes of May 23, 1985.

²² JFCS (1985). Statement of Support, Revenue, Expenses and Changes in Fund Balances for the Year Ended June 30, 1985.

grow together. Dr. Friedman's first task as Executive Director was to develop a two-page strategic plan that listed the following eight major initiatives that required simultaneously implementation and achievement:

1. To define and limit the scope of service delivery within the context of the Agency's Mission Statement;
2. To gradually shift staffing patterns to support agency-wide and agreed-upon program priorities;
3. To maintain the agency's capacity to respond to those in need of concrete assistance, but also make casework services available to the full spectrum of the Jewish community;
4. To expand the distribution of services to a tri-county model in order to reflect the changing demographic trends of our local Jewish population;
5. To continue to provide leadership to the Jewish and general communities in social planning, community organization and community coordination;
6. To increase advocacy efforts locally, statewide, and nationally;
7. To create a strong publicity, public relations and development program, in order to maintain and develop a diversified funding base and the support of the community, Board and staff;
8. To integrate program development with fiscal realities, using a computerized system to project (1) service capacity of agency resources; (2) costs of programming; (3) potential revenue generation; and (4) relevant information about the agency's clientele²³.

²³ JFCS (1985). Summary of Program Objectives and Goals 1985-1988: Three Year Strategic Plan.

Board development was considered a key activity in order to generate change throughout the organization. Both Dr. Friedman and Bernard Werth recalled that many of the board members had come to the organization because they loved the programs or they were recruited by friends working or volunteering for the agency. As a result, the board was comprised of many well-intentioned people but it was not well-rounded, and board members with few exceptions, had not taken an active role in agency fund development. Board members did not, for the most part, feel they had primary responsibility for the institution's financing. Bernard Werth recalls that board meetings were held during the lunch-time hour, and that members were either late, distracted by their lunch, or thinking about the tasks that lay ahead of them once they returned to their offices.

Dr. Friedman initiated numerous conversations about the role of the 21st Century Board and began to develop a strong board that was representative of a broad section of the Jewish community and knew what was expected of them regarding agency governance and fundraising. Board guidelines were established, members were given numerous training opportunities, and meetings were moved to the evenings. A new Board and institutional culture was created. In 1985 several more board committees were established, including a Board Strategic Planning Retreat Committee, a By-Laws Subcommittee, and an Ad Hoc Subcommittee on the Sale of the Homewood Terrace Residential Treatment Program Houses, which handled the sale of each of the remaining three houses.

Although the organization had historically been engaged in advocacy in the community, Dr. Friedman emphasized that JFCS needed to be more visible and effective in its advocacy. In 1985 the Board involved themselves in several political issues. A Public Issues Committee was given board approval to act on behalf of JFCS. Activities were numerous in an effort to represent

JFCS constituencies, such as a letter to President Ronald Reagan opposing changes in the tax code related to charitable contribution, or active in opposition of Senator Montoya's Bill to mandate pre-divorce counseling. The Public Issues Committee also opposed California Assembly Bill 80 that would prohibit abortion on unmarried minors without parental permission and supported many other legislative actions that were in line with the agency's mission and vision.

Agency Fund Development also continued to be a priority. The Friends Campaign of 1985 raised close to \$75,000 for the organization through mail and in-person solicitation and an advertisement in the Jewish Bulletin. The first issue of the agency's newsletter, called Outlook, was published in February and the agency actively sought companies to sponsor the newsletter through purchasing advertisements. The organization also scheduled its first special event to commemorate the agency's 135th Anniversary, which grossed over \$48,000. The Jewish Community Federation continued to discourage local agencies from engaging in independent fundraising; however, the agency's initial efforts were not determined to be in conflict with the Federation activities given the urgent need for funds to help people in need.

In April 1985, the Agency Development Committee's first Three-Year Strategic Development Plan was approved. This Plan involved increasing the agency's annual campaign membership base to broaden support for the agency, producing an annual special event to increase agency visibility and generate income, define guidelines and mechanisms to promote individual contributions, establish a program of endowment/planned giving to increase long-term financial support through bequests, and produce literature to support ongoing development²⁴.

The Program and Planning Committee continued to develop and expand their programming to meet the growing needs of the people of all ages in the local Jewish community.

²⁴ JFCS (1985). Agency Development Committee: Three Year Strategic Plan.

The expansion of services was primarily funded through foundation grants. In 1985 JFCS received \$25,000 to fund their Children of Divorce project, which allowed the agency to expand its outreach to families, schools and daycares centers in all three counties served. Grants were also received from many sources; for example from Sinai Memorial Chapel for senior outreach, from the Tenderloin Outreach Project to serve Jews living in poverty, from the National Council of Jewish Women to hire a Parents Place Volunteer Coordinator, from the Koret Foundation to establish a new clinical program to provide outpatient psychotherapy to children and their families, from IBM for computers, and from the Maimonides Fund to expand the Home Support Services Program for the elderly. In 1985 the agency also received its California State licensing for adoptions and foster care placements. The Adoptions Program then expanded comprehensive fee-based adoption services to the entire community.

Implementation of the Strategic Plan (1986-1989)

With a new leader at the helm and a new vision, the organization continued to work in accordance with its Strategic Plan for the remainder of the decade. The agency developed services to clients of all ages in all counties served, and continued to apply for, and receive, growing numbers of foundation grants to expand services in Marin and the Peninsula. Branch sites were remodeled to increase service capacity and new employees for each site were hired. The organization received a significant number of foundation grants. For example, in 1986 the Jewett Foundation provided the agency with a grant to develop a Parents Place Manual to be distributed nationally based on its national acclaim as a new and effective model for supporting families to be successful.

During these years the Board worked closely with Dr. Friedman to not only develop their own fundraising plans, but also to help the organization become financially diversified and self-sufficient. Seisel Maibach, President of the Board 1986-1988, recalls many Board meeting discussions about how to solicit donations and develop social enterprise ventures to generate revenue based on JFCS expertise and community need. For example, the agency had already been successfully providing home support services through volunteer efforts to help the elderly maintain their independence (cooking, shopping, cleaning, personal care, and companionship). In light of long waiting lists for these services and the success of the program, the agency decided to embark on a social enterprise venture called Help at Home. In 1988 this fee-for-service program was implemented to provide home care, nursing care, meal delivery, laundry, personal affairs management, and/or emergency response service to the growing numbers of Bay Area older adults.

In 1987 Dr. Friedman hired Claire Axelrad as the Development and Public Relations Director. She had been recruited by Board member John Blum, whom she met while taking a two-day course on fundraising. Ms. Axelrad recalls that Dr. Friedman had been the Executive Director for two years and was creating a management team to focus on agency development and Ms. Axelrad was hired to help the Board raise money (personal communication, Claire Axelrad, March 24, 2008). Since grant proposals were primarily written by Dr. Friedman and staff members, Ms. Axelrad set about to streamline grant writing and establish a Development Department that was a collaborative effort between program staff and the Development Department. The Agency Development and Public Relations Committee also continued to focus on growth through the annual Friends Campaign, establishing a system to make Tribute Fund Contributions in honor of friends and relatives, implementing a solicitation program to build the

agency's endowment, and hosting an annual fundraising gala. The agency adjusted its fee structure several times based upon a desire to reflect clients' ability to pay and the agency's goal to increase fee revenue. The fee philosophy was based on the idea that market rate should be charged for services and scholarships and fee subsidies offered to those who could not afford market rates.

In 1986 the agency entered a new program area in response to an unmet service need. In the mid-1980s San Francisco was the epicenter of the emerging AIDS epidemic. In response to growing AIDS crisis, JFCS founded the Jewish Emergency Assistance Network (JEAN) to coordinate activity between Jewish organizations and synagogues that Jewish agencies prioritize community education, and both financial and mental health assistance to those with AIDS and their families. Jewish Family and Children's Services became the first Jewish AIDS outreach program in the United States. Funding was secured to initiate the AIDS Family Assistance Project. This program provided counseling and emergency financial assistance to people with AIDS and their families. It also created and trained a volunteer base to coordinate community education efforts and Speaker's Bureau.

The Board continued working on continuously developing new policies and procedures as part of revising the agency's Policy and Procedures Manual. The Board also created new committees and subcommittees such as the Ad Hoc Committee on Social Enterprise and the Personal Affairs Program Subcommittee. Board development continued with the establishment of a Board Training Plan that included a series of special training sessions on how to make meetings work and how to effectively lobby. Dr. Friedman recalls that one of her top goals in her first five years as Executive Director was to build a strong board that was engaged in all aspects of the organization.

The Board also represented the organization on local and national political issues. In 1987 Jewish Family and Children's Services collaborated with Jewish Family Services of Los Angeles to introduce the Personal Affairs Management Bill in the state legislature to provide funding for multi-service centers to offer services to the frail elderly. They also involved themselves politically on issues of mandatory AIDS testing and in 1988 developed an agency policy on AIDS legislation that opposed discrimination against persons with AIDS and promoted community education, prevention, and advocacy. Furthermore, board members wrote letters in support or opposition of a number of proposed legislative acts and ballot initiatives.

The second major wave of refugees from the Soviet Union began in 1986. In 1987 Dr. Friedman urgently requested additional funds from the Jewish Community Federation to meet increasing resettlement needs, especially for the hundreds of Russian and also Jewish Iranian émigrés who were arriving after the overthrow of the Shah of Iran. In 1988, the numbers of Jews leaving the Soviet Union reached a seven-year high and in 1989 the agency opened a temporary Émigré Annex office in response to a dramatic increase in newly-arriving Soviet Jewish families. The cost for the expansion was offset by allocations from individual donors, the Jewish Community Federation, and federal refugee resettlement grant funds. The agency also expanded its émigré services in the South Peninsula to serve the growing population settling in that region in order to work in the growing high tech sector.

JFCS experienced significant growth during these late 1985-1995 years. The number of cases opened in 1987 was 62% greater than in the same period in 1986²⁵ and went up 48% in 1989²⁶. The operating budget for the 1987/1988 year rose to \$4,178,000 with 22% of the agency's revenues reflecting government, private and foundation grants devoted to émigré

²⁵ JFCS (1988). Board of Directors Meeting Minutes: Meeting of January 28, 1988.

²⁶ JFCS (1990). Board of Directors Meeting Minutes: Meeting of January 25, 1990.

services²⁷. During the 1987/1988 year, the agency served 15,887 individuals, an increase of more than 2000 people²⁸.

During this period, the organization began to increasingly use their computerized Management Information Systems to review service statistics and evaluate programming. In 1987 they distributed their first JFCS Client Evaluation questionnaire signaling an increased focus on marketing and client satisfaction with services. In 1988, JFCS also surveyed their growing volunteer base to assess satisfaction as the agency began expanding JFCS services into Sonoma County in response to that community's requests.

Jewish Family and Children's Services once again acted as a first responder following the earthquake on October 17, 1989 with emergency loans, grant assistance, temporary housing, relocation services, crisis counseling, consultation to schools and day care centers, on-site mental health services, and community workshops. The agency's Utility Workshop was destroyed in the earthquake and relocated to temporary quarters while the agency secured the lease on a new site.

Continued Growth and Expansion (The 1990s)

The 1990s was a decade in which Jewish Family and Children's Services continued to grow, expand and become increasingly stable and self-sufficient. The Board of Directors and Dr. Friedman worked to first and foremost diversify the organization's revenue streams in order to help the agency handle increasing needs as well as political or economic and natural disasters. The Endowment/Special Gifts Subcommittee developed a long-range plan to increase the agency's permanent endowment through establishing a base of individuals to participate in the

²⁷ JFCS (1988). JFCS Annual Report 1987-1988.

²⁸ JFCS (1988). JFCS Annual Report 1987-1988.

Heritage Circle. This program, for example, helped donors establish donor-designated funds to honor or memorialize loved ones or achieve social goals. To promote this program, the committee hosted a series of educational luncheons, created an Endowment newsletter, and distributed informational packets about bequests. Board members were encouraged to establish a named fund or charitable trust as role models for others to consider joining JFCS' growing endowment program.

The economic recession at the end of the 1990s and early 2000 was problematic for the organization as the demands for services were rapidly increasing. As allocations from both United Way and the Jewish Community Federation were decreasing and not dependable, JFCS continued to develop a new business model and alternative sources of revenue. The agency hired an additional position, Public Relations Director, to oversee media relations and publications, thereby separating grant writing from public relations.

To continue to finance their programs at existing levels, the agency continued to pursue foundation support, donations to build their endowment, and increased income from fees for service. In addition, the agency developed a new 24-Hour GIFTLINE in 1995 for people to donate memorial, honorific or special occasion gifts to the organization. At the end of 1995 the Board established a New Enterprise Committee to develop new social enterprise programs.

The organization continued to be involved in public issues on both local and national levels. Not only were letters written and petitions signed, but the agency began making selected small financial contributions to support initiatives. The first such contribution made was \$500 to support the Alcohol Tax Initiative of 1990. They also lobbied and made a public statement against the closing of the Mount Zion Hospital Crisis Clinic in 1991, as JFCS relied on the clinic to help with indigent JFCS clients who required medication or temporary institutionalization, and

had no medical insurance. The agency adopted agency policies on many key issues such as Long Term Care, and took steps to advocate for financing of these services. JFCS recognized a growing need in the community for long-term care and identified that the elderly and their families have a difficult time financing such care. In 1993 JFCS also took an official position in opposition to anti-gay discrimination by the Boy Scouts of America.

Programming expanded greatly during the 1990s. The JFCS Sonoma County Office opened in February of 1990, expanding JFCS services to five counties. Services within each of these branches were developed, including senior services in all regions and émigré services in the South Peninsula. In 1991 the agency expanded its services related to the Persian Gulf War with a hot-line and drop-in groups, individual counseling, and crisis consultation as needed. In 1994 the agency established Dream House, a domestic violence and transitional housing program to serve women and children leaving domestic violence situations. The Adoptions Program grew as well, service volume went up dramatically and the program developed a wait-list. In 1996 the program expanded its foster family services to Napa, Yolo, San Joaquin and Sacramento counties. In 1996 the agency received grant funding to initiate mentor and teen volunteer programs and special teen programs to assist with the acculturation of refugee youth.

Parents Place expanded its programming to include such services as a new youth volunteer program called Teens Take Action, a paid Summer Internship Program for teens, and mental health consultation services to after-school programs and camps. Holocaust survivor services also developed during the second half of the decade to deliver services to a growing number of aging survivors residing in the Bay Area. The number of Holocaust survivor clients served by the agency doubled between 1995 and 1998, with more than 350 frail survivors being

served by JFCS in 1998²⁹. In 1998, the agency instituted Café by the Bay, a weekly program that provides a social support and educational opportunity for holocaust survivors. In 1999, the Sonoma County program began to offer a new program called Ways to Work in which low income families are assisted with expenses associated with moving from welfare to work.

During the 1990s there was a growing interest in expanding Parents Place to other locales. As past Board President Alison Ross recalled, Parents Place in San Francisco was a great support for her and thousands of others (personal communication, Alison Ross, April 3, 2008). In 1996, Ms. Ross was pregnant and living in the Peninsula. She looked to the local JFCS office for Parents Place but found that programming was not available. With personal knowledge about the unmet need of the community, over the next couple of years, Ms. Ross along with several other lay volunteers were instrumental in leading JFCS to expand Parents Place to the Peninsula.

The Soviet Émigré Resettlement situation continued to change during this decade when the US Department of State called for 20% of the new arrivals to be resettled using only private sector funding. Since JFCS intended to resettle several hundred émigrés in this category, after the 1991 federal cutbacks they sought active community support through asking community members to volunteer their time, donate furniture and household goods, and local businesses to provide employment opportunities for émigrés. During this time JFCS worked closely with Jewish Vocational Services to jointly operate an Émigré School that provided new émigrés orientation to their new country, casework, assistance with housing, as well as vocational training and English language programs.

In 1992, the Public Issues Committee was closely monitoring President Bush's proposed changes in federal funding of refugee resettlement that included direct budget cuts and a Private

²⁹ JFCS (1998). Board of Director's Meeting Minutes, Meeting of October 22, 1998.

Resettlement Plan that would result in a devastating reduction in refugee resettlement services to newly-arriving families. The agency involved themselves in negotiations among service providers and the federal government to decide how to handle this potential situation. Board members were urged to write letters to legislators to oppose these cuts. In spite of these cuts, JFCS expanded its services in order to meet the needs of aged refugees when they incorporated the L'Chaim Center for Frail Russian Elderly under their auspices. In 1995 the agency began to explore licensure for this program and the feasibility of making site improvements to make it eligible to become a licensed as an Adult Day Health Care facility, which occurred in October 1999 with the grand opening of the newly acquired Judah Street Center. This was a multiservice center that included a full range of Émigré Department services and the L'Chaim Adult Day Center, a medical and social service program.

Funding for émigré resettlement continued to decline when the Jewish Community Federation cut funds to support émigré services in 1995. JFCS, in collaboration with other resettlement agencies, continued to advocate against budget cuts while also seeking supplementary funding from other sources, including a community-wide effort called the New Lives Campaign to generate funds to meet the shortfall created by Federation cuts. This effort was successful in generating new sources of funds for émigré resettlement³⁰ so that essential refugee services were not cut to those who were starting new lives in the US.

During this period, the Émigré Department continued to develop its programming. In partnership with Parents Place, the Émigré Department expanded its Youth Development Program in 1998 to provide additional support to émigré teens. As Gayle Zahler recollects, this expansion was related to a request made by émigré teens for a place to go during after-school hours to help keep them out of trouble and adjust to a new culture. The program was funded by

³⁰ JFCS (1996). Board of Directors Meeting Minutes for April 25, 1996.

several foundation grants and offered bi-lingual counseling, family support, a teen advisory board, a tutor/mentor program, summer internships, Teen Night, a bilingual teen web page, a summer trip to Israel, as well as other services.

During the 1990s the agency was also heavily involved in a collaborative effort to develop senior housing. This was referred to as the Scott Street Project and was a collaborative effort with Mount Zion Health Systems. This effort was to build a facility to serve the full economic spectrum of Jewish elderly and offer a continuum of care. A special Board called the Scott Street Senior Housing Complex Board was incorporated and responsible for all matters related to the evolution of this project and regularly reported to the JFCS board. An Endowments/Special Gifts Subcommittee was formed to help raise the many millions needed for the 215,000 square foot Scott Street Senior Housing and Social Service Complex. A Capital Campaign for this project was initiated in 1998 and \$22 million was raised for the Scott Street Project³¹ in addition to 8 million in donated land and services. JFCS' headquarters, the Miriam Schultz Grunfeld Building and the Rhoda Goldman Plaza assisted living center (157 apartments with a special dementia care floor) was opened in August 2000.

In addition to lobbying the federal government for resettlement funds, JFCS also became involved with the federal welfare reform program. The Public Issues Committee closely followed changes to the federal welfare reform program, from Aid to Families with Dependent Children (AFDC) to Temporary Assistance to Needy Families (TANF) funded through state block grants. This, as well as anticipated Medicaid and MediCal cuts, would mean reduced funding to community providers. Therefore, JFCS prepared itself for the possibility of substantial increases in caseloads and client needs. During this time the federal government was also making plans to eliminate a number of benefits to non-citizens, which also substantially

³¹ JFCS (1999). Board of Directors Meeting Minutes for June 24, 1999.

increased the demand for the agency's émigré program. JFCS spearheaded a Citizenship Initiative in 1995 with Catholic Charities and other organizations serving refugees and immigrants. They also involved themselves in a Tri-Organization Family Services Alliance to respond to the welfare reform policies through a variety of advocacy efforts and Dr. Friedman joined the Governor's Welfare Task Force, then a regular speaker, writer and consultant on effective welfare reform policy. Because of the organization's long history of engaging in community and political advocacy, the agency became concerned by the threat of the Istook Amendment that limited the ability of nonprofit organizations to advocate and lobby.

Although the organization already had a vibrant and active volunteer base, they sought to double their volunteer services during the 1990s. In 1995 the Board established an Ad Hoc Task Force on Volunteerism to study the use of volunteers as well as the extent to which client and community needs were being met. In 1998 the agency distributed 2000 volunteer booklets to local synagogues and agencies in the Bay areas to publicize JFCS' volunteer initiatives and attract new volunteers. The challenges included the need to create meaningful volunteer activities for families and for those who were unable to volunteer on a regular basis and volunteer opportunities at JFCS significantly expanded to involve all age groups.

Expanding Services with Approaching the 160th Anniversary (2000-2008)

Entering the 21st Century was a time of consideration related to all the changes of the previous fifteen years. The Board was well-developed and continued to assess itself and look for ways to improve its governance of the agency through conducting annual board self-examinations. Gayle Zahler was promoted to Associate Executive Director in 2001 to oversee all Émigré and San Francisco Adult Services, Management Information Systems, and

Continuous Quality Improvement Systems (CQI), the Financial Aid Center, Volunteer Services, and administrative and research projects. In 2001 JFCS unveiled a new website, which was developed as a donation from Exeter Group in Boston. JFCS was actively engaged in use of technology to improve all aspects of its functioning, and the new website sought to reach out to more people, obtain feedback and be a place where people could not only learn about the organization but could interact by making donations, volunteering or completing surveys.

The organization also continued to expand and improve upon its regional services and facilities. In 2000 the agency signed a lease for a new facility in Palo Alto that would allow the program to consolidate its services in the South Peninsula. Other properties were purchased in 2001; including a new Scott Street building for Parents Place and a building in San Rafael for the Marin branch. An agency-wide Energy Conservation Program was launched in 2001 to reduce unnecessary energy use in all of the JFCS' offices. In 2006 the agency purchased a building in San Mateo for the JFCS North Peninsula Office (the Eleanor Haas Koshland Center). Overall, JFCS acquired and renovated 11 facilities from 1998 to 2008.

In the 1990's, fundraising and development continued to improve and each year donor gifts and bequests increased. The 150th anniversary of Jewish Family and Children's Services was celebrated in 2000 with the Platinum Anniversary Gala. The Board pledged and raised \$500,000 for the Board Endowment Campaign matching gift fund and the agency worked hard at meeting the 150th Anniversary goal of raising \$25 million for its endowment fund. The JFCS Annual Campaign's goal of \$2 million was achieved through telethons as well as mail and telephone solicitations asking potential donors to help the agency meet its goal. The agency also began to explore new approaches to endowment giving, and created sophisticated and comprehensive planned giving programs.

In 2001 the Émigré Community began planning to host its first annual fundraising and Émigré Gala. The initial gala was held on January 26, 2002 and raised \$25,000 for the Émigré Program³². Current Board Vice President Raquel Newman reports that the Russian Émigré community has become a very large donor base for the organization for the past four to five years, raising more than \$350,000 in 2007. It is clear that the émigrés in the Bay Area want to be a part of the community and give back to the organization that warmly welcomed and helped to resettle them.

The new programs developed in the 1990s and earlier became more grounded in their identity and began to generate new and interesting projects. In 2000, a client of the Émigré Department's Youth Development Program developed and produced a Russian-language magazine for youth ages 15-23. The magazine was called *Transit Magazine* and was distributed to local stores. Each of the four agency branches also continued to develop their identities and expand services. The Sonoma Branch continued to implement the Ways to Work program, helping families move from welfare to work and began hosting an annual Valley of the Moon event, a fundraiser and community gathering at a local winery. The Peninsula expanded its facility to incorporate the expanded Parents Place, Seniors·At·Home, Help·At·Home, Émigré Services and adult programming.

Requests for services continued to increase, particularly after the terrorist attacks of September 11, 2001 (a 200% increase in October 2001³³). These requests were not only a result of mental health after-effects from September 11, but also because of economic hardship and unemployment during a time of recession. Also resulting from the terrorist attacks was communication about agency security. JFCS had received a number of telephone threats

³² JFCS (2002). Board of Directors Meeting, Board Meeting Minutes February 28, 2002.

³³ JFCS (2001). Board of Directors Meeting Minutes, October 25, 2001.

following the attacks and worked with local police to establish measures to maintain the safety and security of JFCS staff and clients. The top attention given to the safety and security of the organization, its clients, its employees and its volunteers continues to this day.

Other programs continued to grow and develop including programs for the disabled, for seniors, for families, and many specialized programs were developed. For example, Adoption Connection became one of the largest infant adoption programs in the State of California by providing open adoption, pre-adoption services, networking to find birth parents, international and domestic adoptions and post-adoption seminars. The program was licensed to provide full adoption services in 19 Northern California counties as well as internationally. The L'Chaim Adult Day Health Services program was also a popular program that had a lengthy waitlist. In 2002 the State budget included funding to support a second shift at the L'Chaim Adult Day Health Center, which would allow the agency to serve their wait list of over 150 people. This ability to bill State MediCal brought in approximately \$1 million in additional revenue to serve frail and low-income clients³⁴.

During this time the agency sought other avenues to recover funds for critical services through strategic partnerships with third party vendors. JFCS expanded contracts with hospitals and insurance companies throughout California to provide services to vulnerable populations. JFCS also created contractual partnerships with HeathNet, Blue Cross, blue Shield, Kaiser, and many other hospital systems as a model for effective services to our nation's growing elderly population.

In 2002 the agency also focused on also expanding the services provided to very old and frail Holocaust survivors living in the community. For several years JFCS had been working with the United States Claims Conference to obtain reparations for survivors. Along with

³⁴ JFCS (2002). Board of Directors Board Meeting Minutes October 24, 2002.

service programs for this population, survivors also required assistance navigating the paperwork and applications needed to file for available reparation and compensation funds. JFCS was able to successfully negotiate grant increases from the Conference on Jewish Material Claims Against Germany, Inc. to aid survivor clients³⁵. To expand their Holocaust Survivor programming, the agency actively sought to develop their volunteer base. They continued to regularly assess their volunteers and in 2004 conducted a large survey of more than 30 volunteer programs serving the Bay Area. The results indicated that 92% found their volunteer experience with JFCS to be satisfactory or very satisfactory³⁶.

In 2003 JFCS began to take new steps in both service delivery and fundraising through collaborating with other local agencies. A partnership was initiated with Goodwill to accept furniture donations for the agency and a collaborative arrangement was made with Catholic Charities to expand the Help·At·Home program to reach the Catholic constituency. The agency also expanded its Car Donations programs and placed print ads to educate the public about this program. This was a very successful venture and brought in significant net donations.

The only area of programming that did not seem to grow and evolve during the 2000's was the Utility Workshop. The program was unable to recover after September 11 and as local businesses began to contract their work out to developing countries in South America or Asia because of cheaper labor. Consultants were brought in to assess the program and develop plans to generate new contracts. In 2005 the agency secured grants from the Haas Foundation and the Mayor's Office of Community Development to develop new lines of business that could compete in the new global economy. In 2005 JFCS launched Cleanerific, a social enterprise business that offers home and commercial cleaning and employment, training and benefits for

³⁵ JFCS (2006). Board of Directors Meeting Minutes January 19, 2006.

³⁶ JFCS (2005). Memo to JFCS Family of Volunteers: January 18, 2005.

underserved segments of the community. Many of the program's workers were former garment industry workers who had been laid off³⁷ when jobs moved to Asia.

In the early 2000's the agency also began to look at a next generations of leaders in the community. They established a Community Leadership Institute to identify, educate, and involve prospective leaders in the next generation of JFCS. In 2002 there were Leadership Institutes in both San Francisco and in the Peninsula, expanding to Marin in 2003. In 2007, the agency applied for and received funding to develop an internal "mini-MBA-type" JFCS Management Training Fellowship Program to train the next generation of JFCS managers and thus ensure continued excellence and innovative leadership. The first class has twenty employees enrolled (all of whom were selected from an application process) and they meet 16-20 hours a month.

JFCS continued its political activism throughout the 2000s. In 2004 the organization successfully campaigned for Proposition 63 that directed increased state funding for previously unfunded services for persons with mental illness. In 2005 JFCS along with other Jewish Family Service Agencies in California formed a new association called the California Association of Jewish Family and Children's Service Agencies to consolidate and strengthen lobbying efforts in Sacramento. The agency continues to actively meet with state legislators to speak about issues that concerned the population JFCS was serving and advocate for increased funding.

In 2006 the Board introduced a new Three Year Strategic Plan for 2006-2009. One strategic goal involved raising the profile of the agency through developing and implementing an updated and comprehensive marketing plan. In March of 2006 the organization unveiled a new community marketing program designed to increase the profile of the organization. This campaign advertisement coincided with the 100 year anniversary of the 1906 earthquake and its

³⁷ JFCS (2006). Board of Directors Meeting Board Meeting Minutes October 19, 2006.

emphasis was on the Peninsula and Parents Place. JFCS also initiated a plan to expand its agency-wide Continuous Quality Improvement (CQI) System to measure performance in all areas of agency activity.

Other components of the Strategic Plan involved developing and expanding some of the agencies programs. Priority areas were identified as programs serving disabled adults, children with special needs, youth, mental health and early childhood mental health, Seniors At-Home and Spiritual Care. The agency hired additional clergy (Rabbi) as part of the spiritual component of their End-Of-Life services. Fundraising and development continues to be a focus of the agency as requests for service were increasing. The Endowment Committee continues to work towards its Board-established goal of an additional \$35 million in endowment funds, and both the JFCS and Émigré Galas bring in significant in-kind and monetary donations. Future planning for the organization involves continuing to find ways to finance the organization in a time of decreasing government services and funding, continuing to advocate for public policy changes to support the organization, emphasizing earned revenue from fee for service and third party payers and increasing contributed income to allow JFCS to continue to serve all in need regardless of ability to pay full market rate.

Conclusion

Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma County is the oldest and one of the largest family service institutions in the US. With a multi-million dollar budget, it delivers a multitude of high-quality programs to 60,000 people across the Bay Area. The organization has a rich and vibrant almost 160 year history in the Bay Area and has grown along with San Francisco. This organization has experienced an unprecedented growth over the last thirty years, a time in which many nonprofits struggled to

stay afloat as a result of changes in the social, political, and economic environment that influenced nonprofit financing and service delivery. Unlike many other nonprofits who had to close their doors in the 1980s and 1990s, Jewish Family and Children's Services expanded to five counties outside of San Francisco, established many nationally recognized programs (e.g., Émigré Services, Seniors·At·Home, and Parents Place), and successfully moved towards financial independence and self-sufficiency. Several themes help to explain the success of this organization.

Community Building

Although Jewish Family and Children's Services delivers programming to members of Jewish and general communities, it is a Jewish organization built upon traditional Jewish ethical principles of communal responsibility and social justice. The organization emphasizes inter-generational ties, Jewish history and continuity, and the value of each human life. Several employees and Board members interviewed noted that being involved with Jewish Family and Children's Services offered them a deep connection to their Jewish culture and community. According to Harvey Schloss, Dr. Friedman frequently reminds both volunteers and employees that the organization is "doing G-d's work." The element of religious identity is also found in some employees, as exemplified by Basia Leaffer in the Émigré Department who acknowledges that it means something to her to work for a Jewish agency. Others have also noted that they are proud to be associated with an organization that has long-served the Jewish community, continues to grow and meet a diverse set of community needs.

For almost 160 years Jewish Family and Children's Services has been at the forefront of supporting the Bay Area Jewish community. From its early years providing assistance to Jewish

émigrés moving to San Francisco during the Gold Rush to its current programming providing multi-generational services, the organization has adhered to its value of promoting Tzedek, or righteousness and justice, in the community. The organization has helped hundreds of thousands over the years and, for many, has helped deepen the roots of Judaism in the San Francisco Bay Area community.

Community Assessment and Programming

A unique aspect of Jewish Family and Children's Services is that they have, historically, assessed the needs of the Jewish and general communities and responded quickly through developing innovative programming to meet identified needs. The organization has a long history of initiating pilot projects to meet identified needs, such as doing outreach to Jewish youth involved in the "hippie" movement, to establishing support groups for inter-faith couples and helping to develop targeted programming for Jews living in poverty (The Tenderloin Project). The agency also believes in using evidence-based practices and conducts researching order to develop new knowledge and best practices; JFCS has published numerous articles in scholarly journals and is regularly represented at professional conferences.

Several of the agency's current programs emerged out of a need that was identified either by staff-led community assessments, assessments conducted by other organizations, or through client voices identifying gaps in service. An example of an agency-initiated needs assessment is Adoption Connection. This program emerged as a result of an assessment conducted by Gayle Zahler that found a gap in service for parents opting for private and open adoptions. The program provides pre and post adoptive counseling among other services and is one of the leading adoption programs in the country. A new program that developed out of an urgent need

identified was the organization's response to the AIDS crisis in the mid 1980s. The Jewish Emergency Assistance Network, convened by JFCS, acknowledged a need for counseling and financial assistance for this population and Jewish Family and Children's Services responded immediately through developing agency policies and programming to support this population. JFCS' Émigré Youth Services program largely developed out of a need identified by émigré youth who wanted to engage with other youth after school hours and who felt isolated and at-risk.

Funding Diversification

An important factor that has contributed to the long-term success of Jewish Family and Children's Services is that the organization's leaders paid close attention to changes within the social, political and economic environment of the 1980s. During this decade many nonprofit organizations struggled to survive as their contracts with public agencies were changed, reduced, or terminated. Dr. Friedman, both as Associate Executive Director and Executive Director, along with several Board members and employees recognized what was happening in the larger socio-political context with regard to the nonprofit community as a whole as well as the Jewish community. Not only were non-profit organizations experiencing reductions in their federal and state contracts, but they were also experiencing cuts in their Jewish Community Federation and United Way allocations.

Although the choice to diversify their revenue streams is not an uncommon decision in the nonprofit community, several leaders of the organization recognized the need early and quickly to take action to help them adapt to the changing external environment. The Finance and Development Committees took on many tasks during this time, from re-evaluating and re-

organizing the organization's financial policies and procedures to identifying and executing plans to generate new sources of revenue. The Board and Executive Team made important decisions to spend valuable resources on hiring professional staff to assist with grant writing, publicity, and fundraising. They successfully developed a fundraising plan that involved annual fundraising campaigns for both the agency and its endowment as well as hosting an annual gala to both raise funds and the visibility of the organization. Over time the organization made decisions to purchase properties, raise its fee schedules, and establish social enterprise businesses that generated income for the organization.

There are several factors that contributed to the success that this organization has had in diversifying its revenue base in order to pursue its historic mission. First, the organization took action early by developing and adhering to a widely agreed-upon, agency-wide strategic plan. Second, leadership and advocacy play key roles. In previous decades, central funding organizations such as the Jewish Community Federation and United Way had been the primary vehicles from which local organizations were funded. In fact, this model of non-profit funding had been changing since the 1970's, donations in both the Jewish and general communities began moving away from giving largely to centralized fundraising entities like United Way to direct giving, and elimination of the "middleman". JFCS leaders were early to recognize that philanthropic giving trends locally and nationally were changing and that they needed to institute fundraising plans so they set about hiring skilled staff and forming volunteer committees to do so. Although this decision by JFCS was not originally popular among some Federation-oriented community members, JFCS' leadership continued to focus on diversification and fundraising. Now, all Jewish and general community organizations locally and across the US have adopted similar diversification plans for diversifying revenues and becoming more business-like and self-

sufficient in financing their operations. Third, San Francisco had a vibrant and thriving philanthropic community during this time. JFCS's fine reputation and social and work-related connections that both Dr. Friedman and the Board of Director's had with their community enabled them to attract foundation funding and major individual donations. Additionally, the organization did not shy away from charging fees for services, including those that had previously been free, regardless of clients' ability to pay. Jewish Family and Children's Services regularly increased its fee schedule while also providing scholarships and sliding-scale options for those who could not afford to pay full fee-for-service. Finally, the Board made creative decisions around social enterprise ventures, such as the establishment of Help·At·Home (now called Seniors·At·Home) and Cleanerific.

Governance

One of Dr. Friedman's initial strategies when she was promoted to Executive Director was to develop the Board and actively engage them in all aspects of governance and agency oversight. This was a process that took several years but was successful as current board members reflect that the board is changed, diversified, and appropriately involved in governance. The 30 current board members are all Jewish, and despite religious similarities, the Board reflects diverse manifestations of Judaism, diversity in residential location, political views, education, economic status, lifestyle and areas of expertise. The Board includes several members of the Russian Émigré community.

Because of its large size, much of the organizational decision-making process occurs in smaller board committees. At present, Jewish Family and Children's Services has a number of committees including a Development Committee, a Finance Committee, a Public Issues

Committee, a Personnel Committee, a Facilities Committee, and a Program and Planning Committee. These committees have several subcommittees that come together around specific issues. For example, the Endowment Committee that is working to raise \$35 million is part of the Development Committee. There are also subcommittees for each of the branch sites operated by the organization. The agency's committees and subcommittees examine specific issues, develop recommendations on how to best address the issues, which they then present to the entire Board during its monthly meetings. According to current Board members, this process works smoothly and most board members are actively engaged in several committees or subcommittees.

Several employees interviewed commented that both the Board of Directors and Dr. Friedman are incredibly supportive of their programs and program staff. This may, in part, be due to agency priorities and use of methods to focus on service such as the educational presentation that is included in each board meeting. At least one program is presented to the Board during each regular meeting. In many instances the program employee making the presentation brings with him/her a client or two who have benefitted from the program. This offers the Board with an opportunity to have a better understanding of the programs that they oversee and the clients who are being served.

Leadership

In 1985 the Board of Directors recognized its identity as a struggling nonprofit organization and began to ask difficult questions about what it takes to lead a nonprofit organization into the 21st Century. The Board came to the conclusion that the Executive Director at that time did not have the management skills or leadership qualities necessary to help the

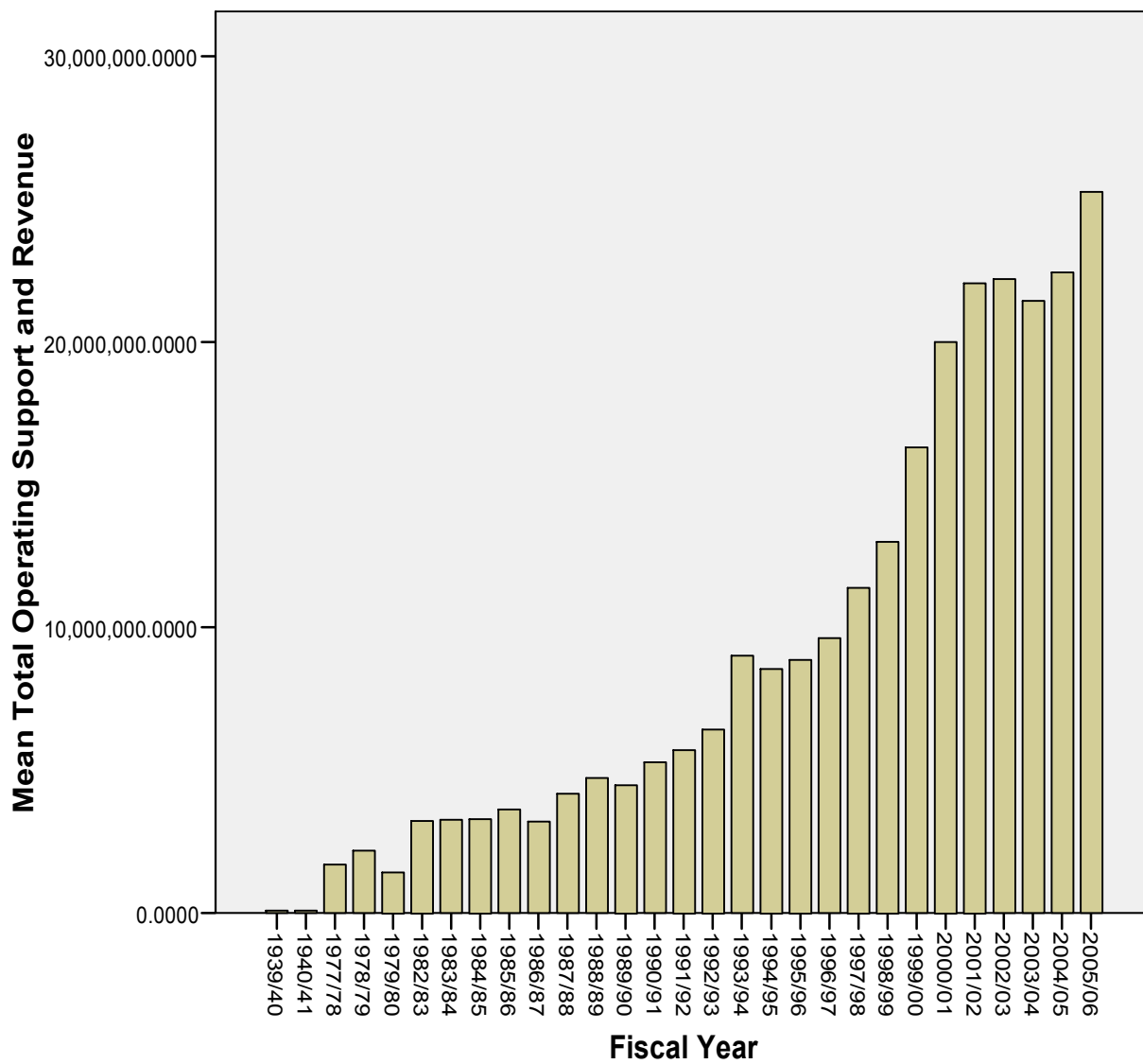
organization survive the turbulence of the decade. The Board then made the difficult decision to replace him and promote Dr. Friedman to the Executive Director position. Almost everyone interviewed for this project reflects that this change was beneficial because an organization in transition requires a leader with a strong vision and management skills to facilitate change.

Both board members and employees assert that the Executive Director is an energized leader and has built the organization in a significant way. Dr. Friedman's success as a leader is attributed to many factors, including personal qualities. Many of those interviewed recall that Dr. Friedman was an early leader in the émigré resettlement community prior to beginning her tenure at Jewish Family and Children's Services. As a leader in the community, Dr. Friedman was and is considered to be a person who has both a vision and the dedication to help her vision materialize. Leadership qualities that are important to JFCS include commitment, management skills, recognition of the organization within its larger environmental context, vision, decision making skills, and ability to professionally deal with the sometimes unpopular consequences of agency decisions.

Leadership at JFCS is also attributed to the Executive Director and Board's decisions to hire and promote talented employees into positions to help them achieve organizational change goals. When she initially accepted the position of Executive Director, Dr. Friedman set about building both a board and a management team who shared her vision and had the skills and tenacity to facilitate organizational change. Many of those interviewed reflected that the organization's success and development is largely due to a strong executive team and highly skilled workforce. Another factor that has been attributed to the success of the organization is that it has taken a leadership position in the community as both the Executive Director and the Board have developed and maintained long-lasting relationships with community members and

with many other organizations, with whom JFCS often collaborates. The agency's political connections, both local and national, have also helped the organization successfully advocate on behalf of the constituencies whom JFCS serves.

Appendix A – JFCS Financial Trend Line



Appendix B:

Interviews were conducted with the following people between February and May 2008:

Claire Axelrad

Randie Bencanann

Carole Breen

Cynthia Cox

Marga Dusedau

Dr. Anita Friedman

Basia Leaffer

Gail MacGowan

Siesel Maibach

Raquel Newman

Alison Ross

Harvey Schloss

Bernard Werth

Gayle Zahler